Transfer Lead Management Process Mapping

1. How do you currently store, track, and manage inquiry data?

2. What sources (inquiry form, etc.) are you currently using to identify transfer prospects?

3. How frequently do you review this data to determine which students require follow-up?

4. What methods of communication are used to contact transfer students and follow-up?

5. How does this differ for concurrent admissions students/ international students with transfer credit?

6. How do transfers know what enrollment steps need to be taken? How do they know if they are on-track?

7. How do you capture prospect information from internal influencers?

8. How do you load portal data into your CRM?