TRANSFER PORTAL

Transfer Lead and Inquiry Toolkit

This resource can be used to design new processes and content for improving communications with prospective transfer students.

Table of Contents

Tool 1: Buying Cycle-Based Lead Naturing Map

Diagrams the progressions of lead-scoring stages, the prevailing mindset of prospects in each stage, and corresponding marketing messages to nurture leads toward applications and enrollment.

Tool 2: Communication Plan Builder

Includes a decision tree to help partners understand the strategic variables that impact communication plan development, as well as a sample communication plan for prospective transfer students who have used the Transfer Portal.

Tool 3: Lead-Prioritizing Phone Script

Provides phone script examples and guidance. Phone conversations used at the right stage can be highly compelling to a prospective student and useful for gauging their interest and likeliness to convert. Successful use of student ambassador-delivered phone calls can be a way to save a transfer counselor's time.

Tool 4: Personalized Email Builder

Distills lessons learned and includes a sample template designed to help staff build engaging emails – from the subject line to the signature.

Tool 5: Follow-up Conversation Scripting Tool

Provides a series of talking points that can be used by enrollment counselors to solicit the information needed to develop a prospect's customer profile and better tailor future communications.

Tool 1: Buying Cycle-Based Lead Nurturing Map

Crafting communication material suited to prospects' needs and expectations as they move through the funnel is a highly effective way of keeping transfer leads engaged. However, most recruiting units struggle with the seemingly high-touch nature of such exchanges because they do not develop tailored content. Instead, they use one-size-fits-all communications across the funnel or re-purpose first-time in college messaging.

The **Buying-Cycle-Based Lead Nurturing Map** will help you develop lead-nurturing content that better meets prospects desires as they progress through the funnel.

Implementation Note: Though it can be difficult to accomplish, collaboration between marketing and academic subject matter experts yields the highest quality communication material. This tool can facilitate such collaborations by providing a checklist of communication materials to which subject matter experts are best suited to contribute, while leaving the branding and strategy components to marketing.

Stage in the Funnel	Place in Buying Cycle	Preferred Messaging	Targeted Content Checklist
Prospect / Inquiry: • Initiated contact (email, phone call, inquiry form, visit) • Was referred by someone else • Visited website and explored Transfer Portal tool	*Interested* *Researching* *Considering*	*High-level educational information*	**Emails covering:** ☐ How to complete the application and FAFSA ☐ FAQ ☐ Testimonials and outcomes ☐ Financial aid ☐ Faculty profiles ☐ Curriculum
• Stopped responding to emails/calls • Completed one or some of the above actions but stalled	*Anxious*	*Specific, program-level information*	**Emails, scripts/talking points for conversations and live chats, in-person event agendas covering:** ☐ Testimonials ☐ Career outcomes ☐ Faculty profiles
Application in Progress: • Started an application	*Anxious*	*Reassurance and reminders*	**Emails, scripts, for conversations, and live chats:** ☐ Outcomes ☐ Expectations ☐ Deadlines
Applicant: • Completed an application			**Emails, scripts for conversations, and events:** ☐ Outcomes ☐ Expectations
Enrolled			

Tool 2: Communication Plan Builder

A strong communication plan is instrumental for nurturing prospects through the funnel without making unrealistic demands of Admission counselors. However, the myriad of factors involved like duration, frequency, content, and program type make the process of building communication plans daunting.

The **Communications Plan Builder** simplifies this process by bringing order to it. It lays out key considerations when building a plan and describes an example communication plan.

Primary Consideration: Program Type

This table explains how automated communication plans should differ according to program type, which is the primary "independent variable" that communications can be configured around.

Program Type	Max Frequency	Duration	Content

Certificate	1-2 times per week	3 months	• Alumni outcomes
			• Faculty's field experience
			• Credit transfer to degree program
			• Curriculum alignment with industry standards
			• Convenience
			    ○ Modalities
			    ○ Start dates
			    ○ Duration
			• Financial aid

Undergraduate Degree Completion	1-2 times per week	4-6 months	• Convenience
			    ○ Modalities
			    ○ Start dates
			    ○ Duration
			• Financial aid
			• Student profiles addressing key concerns:
			    ○ Work-life-school balance
			    ○ Academic rigor
			• Curriculum
			• Credit transfer
			• Experiential credit

Example Communication Plan for a Transfer Prospect Who Used Transfer Portal

This plan suggests the order and variety of content that could be communicated to a prospective transfer student who has used the Transfer Portal.

Day	
1	**Introduction** • Introduction of transfer counselor • Segment-specific paragraph about credit evaluation process and Transfer Portal • Top three benefits of interested program and labor market outcomes • Upcoming priority deadlines (scholarships, app)
3	**Program Features** Learn more about the curriculum. Download transfer guide.*
7	**Role of Transfer Counselor** Learn what questions a transfer counselor can answer. Schedule an appointment.*
12	**Scholarships, Financial Aid, Application Info** Read our instructions for completing the FAFSA and download our transfer financing guide.*
15	**Invitation to Info Session** This [insert delivery mode (e.g., transfer day)] will address [xyz] content on [date]. Register now!*
25	**See How your Credits Transfer** Learn the credit evaluation process, credit policy, and access the Transfer Portal.*
30	**Meet Former Students, Alumni, Employers** Former transfer students and alumni explain the value of their degree at Example University. Visit our website to watch video testimonials.*
35	**Designating Time to Complete Application** We'd love to develop a personalized strategy with you. Schedule appointment with your transfer counselor. *

Emails for Appointment Schedulers

Day	
8/31	Appointment confirmation.
?	Manually send thank you after appointment with follow-up info.

Emails for Info Session Registrants

Day	
22	Thanks for registering.
26	Day-prior reminder to attend.
27	Thanks for attending! Contact counselor with further questions.

**Opportunities to collect additional prospect information*

Implementation Tips for Creating a Communication Plan

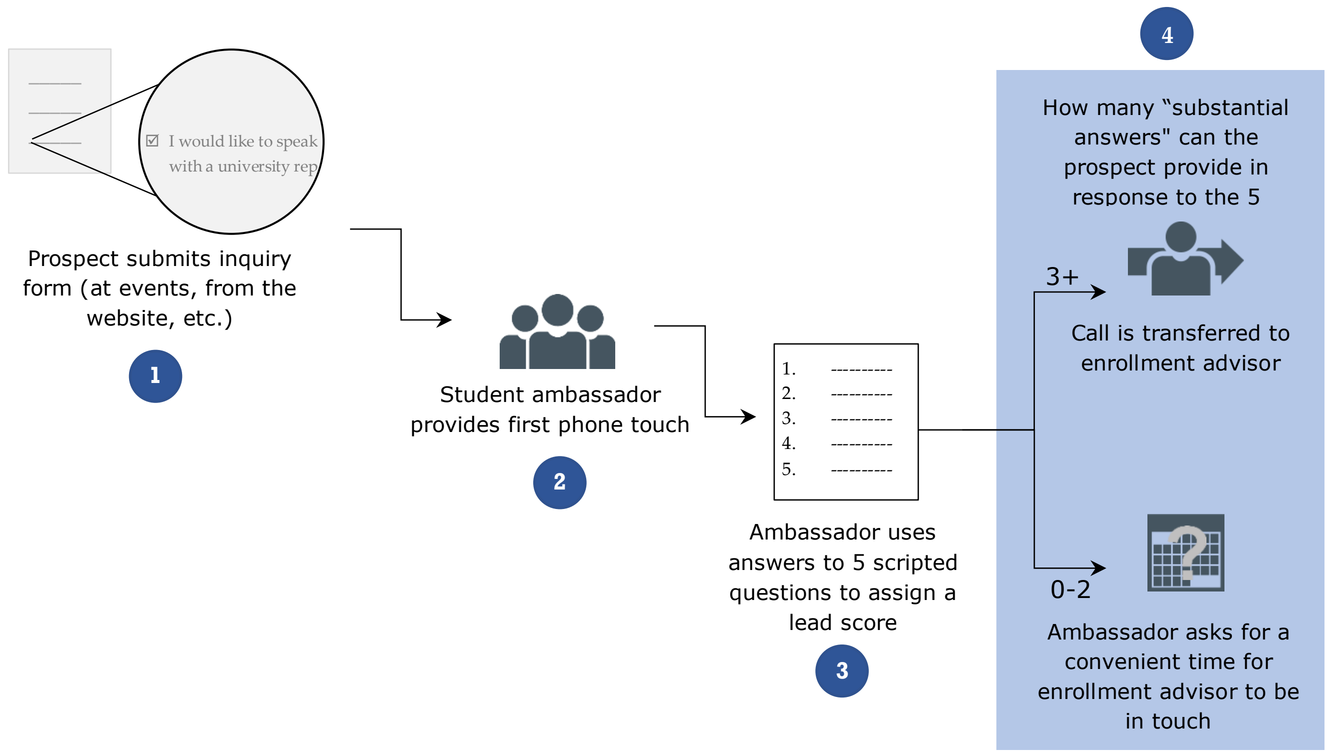
- ✓ **Always Look for Low/No-Pain Ways to Collect More Information**: Each prompt to follow a link (e.g., to register for an event, schedule a conversation, use the Transfer Portal, or a net price calculator, etc.) is an opportunity to collect additional information about the prospect through a quick survey or RFI.
- ✓ **Save Time by Recycling Material**: To the extent possible, aim to create a communication plan that confines program-specific unique content to just a few steps in the communication plan (i.e., Program Features, Faculty are Experts). The emails at each of the remaining steps can reuse content from other communication plans and be reused themselves.
- ✓ **Consistently Incorporate Calls to Action**: Contacts advise that each message should contain one or two calls to actions. Popular ones include: Application Deadline, Register Now, Talk to Your Transfer Counselor, See How Your Credits Transfer, and Register to Attend a Transfer Event.

Tool 3: Lead-Prioritizing Phone Script

Research shows that phone conversations used at the right stage in the buying process can be highly compelling to a prospective student and useful for gauging interest and likeliness to enroll. However, many units struggle to provide such high-touch interaction with all prospects with limited staff capacity. A large public university worked around their staff size by using student ambassadors as ancillary phone staff. By completing the initial phone screen, student ambassadors prioritize phone follow-up delivered by enrollment advisors.

The **Lead-Prioritizing Phone Script** profiles the university's ambassador-driven phone screen process, including the script ambassadors use to score leads before making recommendations to enrollment advisors.

The Lead Scoring Process



1. The process begins when a **prospective student submits an inquiry form**.
2. To save enrollment advisors' time, **student ambassadors provide the first phone touch**.
3. Over the course of the conversation, **ambassadors ask the prospect 5 questions** (see below). The script ensures the quality of the conversation as well as the uniformity of lead scores.
4. The number of "substantial answers" (defined as a response of more than 5 words) a prospect can provide **earns them a score from 0-5**.
    a. Ambassadors **immediately transfer hot leads, those with 3+ significant responses, to an enrollment advisor** for more in-depth conversation.
    b. Ambassadors **ask warm leads, those with a score of 0-2, for a preferred date and time window** during which an enrollment advisor should be in touch. This gives cooler leads more space, while also providing enrollment advisors with greater scheduling flexibility.

Building a Transfer Student Script

Develop a script that asks meaningful questions in a thoughtful tone. Ideas for types of questions to ask prospective transfer students are listed below:

1. Motivations for transferring
2. Sources of worry
3. Programs/areas of interest
4. Need-to-have components of a program/institution/experience
5. Previous educational experience and expected transfer courses

Lead-Scoring Script

1. What's going on that is driving your decision to transfer?
2. What are some of the considerations you're weighing as you choose to transfer?
3. What type of program and college will help you achieve your goals?
4. Are there specific characteristics you are looking for in a program or university?
5. Do you have questions or concerns about transferring to Example University?

Ideally, the intelligence derived from the call will be used not only to score the lead, but to identify meaningful ways to continue the conversation in the future. For example, a prospect who voices worries about how their credits will transfer would highly value an email about connecting with a transfer advisor or using the Transfer Portal.

Tool 4: Personalized Email Builder

Templatized emails save staff members time as they manage a large volume of outreach. However, many templatized emails are impersonal or bland. This tool outlines a framework for templates that feel personalized through an engaging voice that fits the email's purpose and the institutional identity.

Complete the worksheet below to help your team think through how to craft each email component for the best possible open and action rates.

Email Builder Worksheet

From Field: taylor.smith@example.edu

➢ **Send e-mails from a transfer advisor's email address.**

Subject Line

Consider the following subject line strengtheners:

- Prospect's Name Example: Ben, thanks for your interest. I have a few answers to your questions.
- Question Example: Why do you want to transfer to ExU?
- Casual Greeting Example: Hello from ExU! We have stress management tips to share!
- A Call-to-Action Example: Meet with a Transfer Counselor: Register for the next session before Friday.

List two elements from the list above that you would incorporate into a subject line.

______________________________ ______________________________

Compare answers with a colleague and craft a sample subject line. Write your sample below:

____

Salutation:

➢ **It is recommended to address an email to the prospect's first name or eliminate the salutation and begin the email with a casual greeting.**

Consider the following salutations. Check the salutation that you think will best resonate with your prospective student audience based on the age and career level of your typical prospective transfer student:

- ☐ Dear Brian,
- ☐ Hi, Brian:

Generally, more appropriate for older, more executive audience, but test to be sure.

- ☐ Hello and thanks for your interest in Example University!
- ☐ Hi there! We're glad you are interested in the XXX program at Example University.

Email Body

See the example below for sample text.

Sign Off and Signature

➢ **Sign emails with a first name and including contact information in a signature**:

Have a nice day!
Taylor
taylor.smith@example.edu
xxx-xxx-xxxx

Alternative sign offs:

- *All the best,*
- *Thanks again!*
- *Take care,*
- *Warm regards,*
- *University Specific Signoff*

Sample Email: Thanks for Your Interest

Subject: Padma, your transfer advisor is here to help

Hi Padma,

Thanks for your interest in the XXX degree at Example University. I'm excited to hear you're exploring your transfer options with us.

As you review how your credits may transfer through our Transfer Portal, I'm happy to connect and answer any questions you have. We can meet by Zoom, phone, or in person, whatever works best for you.

You can schedule a time using the link below. Feel free to share what you'd like to talk about ahead of time, and we can keep the conversation quick or dive deeper based on your needs.

https://www.scheduletimewithme.com

In the meantime, I recommend checking out a few helpful tools in the Transfer Portal. The Transfer Checklist can help you stay on track, and the Campus Resources section has more details about life and support at Example University.

I look forward to connecting soon.

Have a nice day!
Margaret

Margaret Grainger
Transfer Counselor
Example University

mgrainger@example.edu
xxx-xxx-xxxx

Tool 5: Follow-up Conversation Scripting Tool

Programs with dedicated frontline prospect services staff typically equip call centers with tried and tested scripts. However, not every unit (or every program) employs call center staff and instead may rely on staff with other responsibilities (e.g., program directors, advisors, recruiters) or student workers for prospect outreach. This tool offers simple guidelines to ensure prospect phone outreach gathers the information needed to complete prospect transfer student profiles.

Implementation Note: Establish a process and shared space for recording responses (e.g., CRM)

Phone Conversation Script

Corresponding Segmentation Tactic

Fill Out Prospective Student Profiles

1. "I noticed you did not indicate your intended term. When do you intend to transfer?"
2. "Are you currently enrolled at another institution? Which one?"

Questions build upon optional inquiry fields that were left blank.

Illuminate a Prospective Student's Motivations

3. "What are some of the considerations you're weighing as you choose to transfer?

   [Note to transfer advisor: be prepared with thoughtful responses to financial aid/cost questions and concerns]
4. "I see you selected XX program. Tell me more about your interest in this area and other programs of interest?"
5. "What factors will affect your program start date? What is your estimated start date?"
6. "What are your educational goals? Why are you interested in transferring to Example University?"

   Possible Prospective Student Answers:

   a. To advance in my current career
   b. To change careers
   c. For personal enrichment

7. "Do you have any questions or concerns about transferring to Example University?"

   [Note to transfer advisor: be prepared with thoughtful responses to transfer credit questions and concerns]

Segment by Motivation
Consider motivation when differentiating communication.

Understand a Prospective Student's Demographic

8. "Which institutions have you attended in the past?"
   a. "What did you study? What did you like about those courses? What study tips will you apply in future courses?"
   b. "What challenges did you face at your last institution?"
9. "Tell me about your career goals."
10. "What responsibilities occupy most of your time? Let's talk about how Example U's curriculum and modality offer flexibility to meet you where you are."

Segment by Demographic
Consider demographics when differentiating communication.