CampusLogin | Leads

Recruiter Training Manual

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1. **New Lead List**
   a. All new leads appear to the right of the calendar under the heading "New Leads"
   b. Web leads are automatically assigned to you and added to your new lead list
   c. You are able to manually enter leads using "Input a New Contact" on the left navigation
   d. Click on the leads name to go to their lead profile
   e. Leads get removed from your new lead list once they are worked in anyway
2. **Lead Profile**
   a. Contact information is automatically filled out from your web forms
   b. You are able to add/update the profile (be sure to save your changes)
   c. The profile middle column contains all of the details about the prospect:
      i. The "Admissions Progress" section outlines what stage in your process the prospect is in
      ii. Leads are marked "Active" by default while you work them through your process of converting them from a lead to a student
      iii. At any point you can mark them as "Inactive" if you no longer wish to work the lead, and you can select a reason as to why, and enter a note with more details
   d. The right column provides all of the communication history
      i. All incoming and outgoing emails are automatically saved to the lead profile
      ii. All incoming and outgoing text messages are automatically saved to the lead profile

iii. You are able to print letters/documents and create custom packages for your prospect.
iv. All previous communication is stored chronologically and listed by the type of follow up
v. You are able to communicate with the lead by using the "Follow Up Options" on the top right of the page
vi. Click the "Schedule a Follow Up" button to schedule follow up phone calls and appointments on your calendar

3. **Appointments**
    a. When scheduling an appointment, you must select an appointment type (Phone Call, Tour, etc)
    b. For phone calls, you will need to disposition your call and save a phone call outcome (Call Attempted, Call Received, Call Left Message, Call Complete)
    c. For all appointments you must specify if the appointment showed (all appointments are defaulted to no show, and you can select if they showed)
    d. Phone calls can be scheduled at specific times or added to the generic call list below the calendar
    e. When dispositioning appointments you are able to schedule your next follow up on the same screen, under the "Book Your Next Follow Up" heading
    f. All appointments appear in the prospects communication history and on your calendar
    g. You are able to book an appointment on someone else's calendar by selecting their name in the staff drop down (at the top of the calendar page).
4. **Calendar**
    a. You can double click on any calendar item to view the appointment details
    b. You can view other users calendar in the "Staff" drop down
    c. You are able to schedule appointments on other users calendars
    d. Items that have not been dispositioned appear in bold
    e. Once items are dispositioned they are no longer bold
    f. If an item if not completed it will automatically be carried over to the next day (this can be enabled/disabled by appointment type)
5. **No Follow Up**
    a. To the right of your calendar you will see your "No Follow Up" list
    b. These are all of the leads in your database without a future follow up scheduled on the calendar
    c. Any leads you convert to students will automatically be removed from this list
    d. Any leads you mark as "Inactive" (point #2, c, iii above) will automatically be removed from this list
    e. This list is the leads you want to follow up with that do not have anything booked on your calendar
    f. Once you work a lead, and schedule a follow up, the lead will be removed from this list

g. Therefore the goal is to keep the no follow up report as zero (if you wish to remove old leads from this report that you no longer want to follow up with please speak to your schools administrator)

Searching & Mass Communication

1. **Searching Your Database**
   a. To find a lead by name, email, or telephone use the “Quick Search”
   b. To query your database by any field on your lead profile use the “Advanced Search”
   c. The “Advanced Search” is also used when mass communicating
2. **Mass Communication**
   a. In the “Advanced Search” results you will see short cut links to “Send a Mass Email”, “Print Mass Letters” or “Send Mass Text Message” to your targeted group of leads
   b. These options are also available on the left navigation
   c. If you do an “Advanced Search” with too many results to call in one day you are able to create a “Call Campaign” and work that group of leads over a longer period of time
3. **Templates**
   a. If you wish to save an templates for future use (E-Mail, Letter or Text Message) you can create them using the “Edit Templates” page
   b. These templates will appear when you send a message or print a letter
   c. You can draw any field into your template from the lead profile of the lead (such as First Name, Program Name, Start Date, etc) by using the “Insert Field” drop down

E-Mails and Text Messages

4. **Un-Read Messages**
   a. On the left navigation you are able to access your “Unread Mail” and “Unread Text Messages”
   b. These new messages stay on the page until you have read and/or replied to them
   c. Once you read them they will be filled away to the leads lead profile indefinitely
   d. If you wish to follow up with a message later you can click “Keep as Un-Read”
   e. If you wish to view a traditional inbox of all messages in chronological order you can by selecting “Inbox” in the “View” drop down
5. **Sent Emails**
   a. When you send a mass email or individual email CampusLogin will automatically track if it is received, opened and if they click a link within the email
   b. You will see this information on the “Sent Mail” page
   c. This is done by encoding a unique, non-visible image in all emails, and if that image loads we know the email was read
   d. A tracking code is also added to each hyperlink so you can see if it was clicked or not

Best Practice Recruiting

Essentials

1. **Clear Your New Leads**
   Follow up with all leads on your new lead list keeping it at zero
2. **Complete Calendar Follow Up**
   Follow up with all activity scheduled on your calendar. Items in bold are not complete
3. **Reply to Un-Read Messages**
   Reply to all new e-emails and text messages and ensure there are zero un-read messages
4. **Clear Leads with No Follow Up**
   Ensure your leads with no follow up list is at zero, ensuring all active leads are being worked