HubSpot for SPC Inquiry to Application Outreach
Tasks Version
Updated 5.21.2020

Contents

One: Background

The "enrollment funnel" is they steps that someone takes to become a graduate of SPC. For the College to generate successful graduates, we nurture those at the first step, so that they can move up the funnel, to enroll, persist, and graduate.

This deals with that first step, 'the inquiry to app' phase.

The basics of what happens:

1. Someone completes an online form requesting more information about SPC.
2. A record is created in HubSpot for that person/contact.
3. The person is assigned an inq to app advisor in HubSpot via round robin.
4. The person is sent a welcome email, from your email address and containing your name and email address, and info to encourage them to apply.
5. If the person requested to be called on the form, the inq to app advisor is assigned a TASK to reach out and call.
   a. Remember that regardless of whether someone asked to be called, each inquiry is assigned an inq to app advisor and may be emailing you with questions, even if you have not been assigned a task for them.
   b. Being responsive to all inquiries is key.
6. The contact is added to a postal mailing list to receive a welcome packet aligned with the area of interest they select.

Two: Setting up and Reviewing Contact Information

1. Log in to www.hubspot.com.
2. Locate the search bar and type "Alisha Test."
3. Click on matching result name to go to a test contact record.
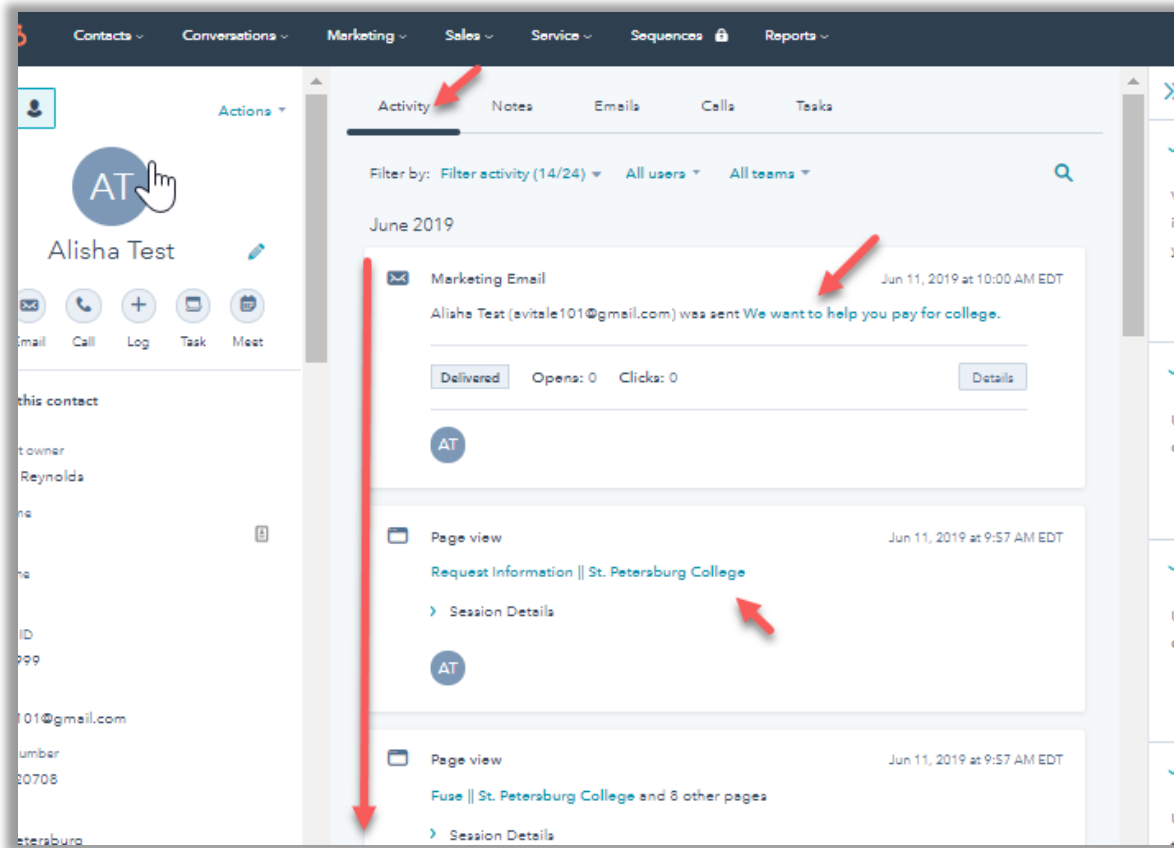   a. You can also type in a contacts phone number or email address to bring up matches.
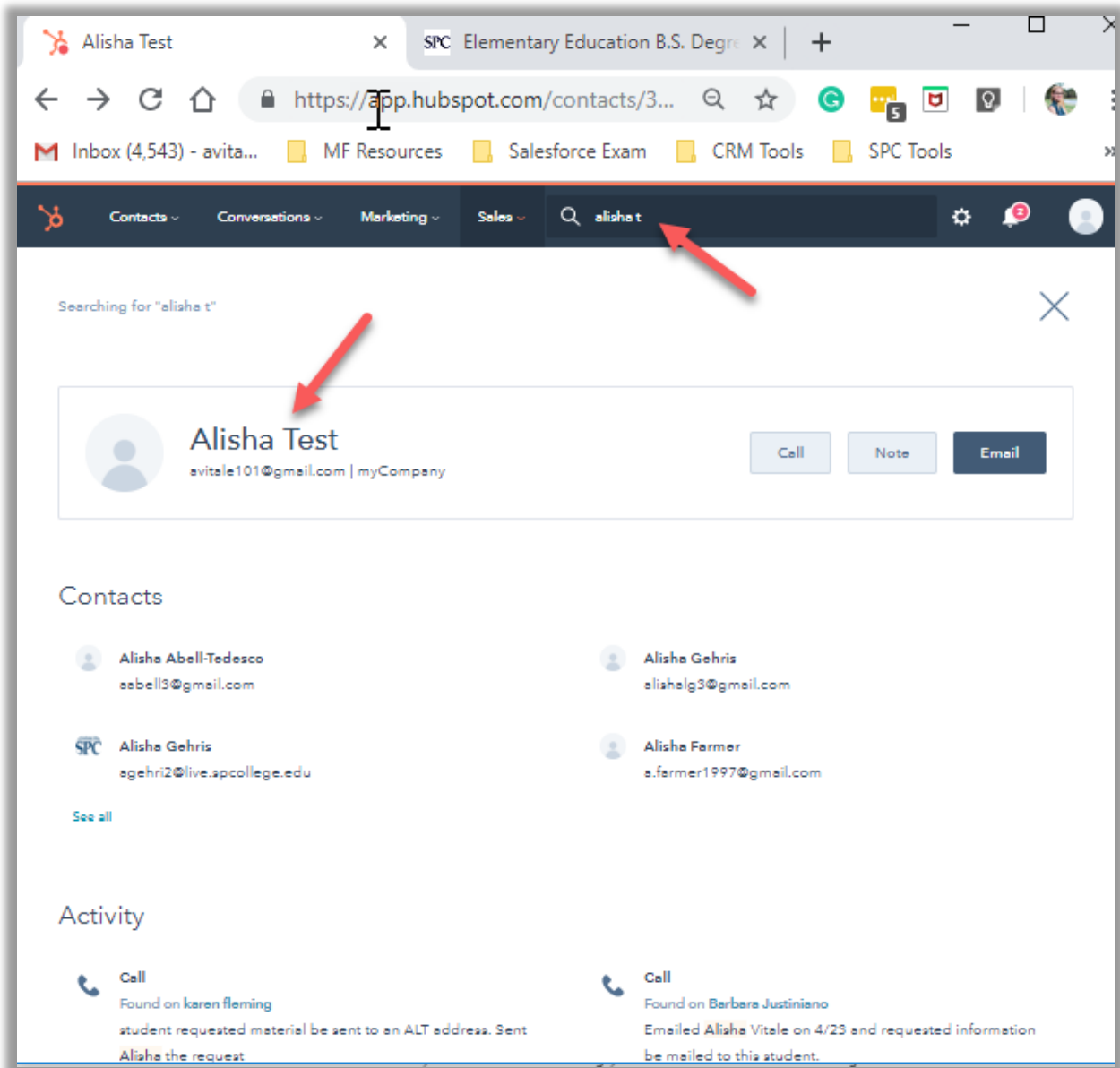
4. Once you get to the contact, click on "Filter activity" to choose the activity you want to see in the activity tab of your contract records.
5. Select "Communication," "Team Activity," and "Contact Activity."
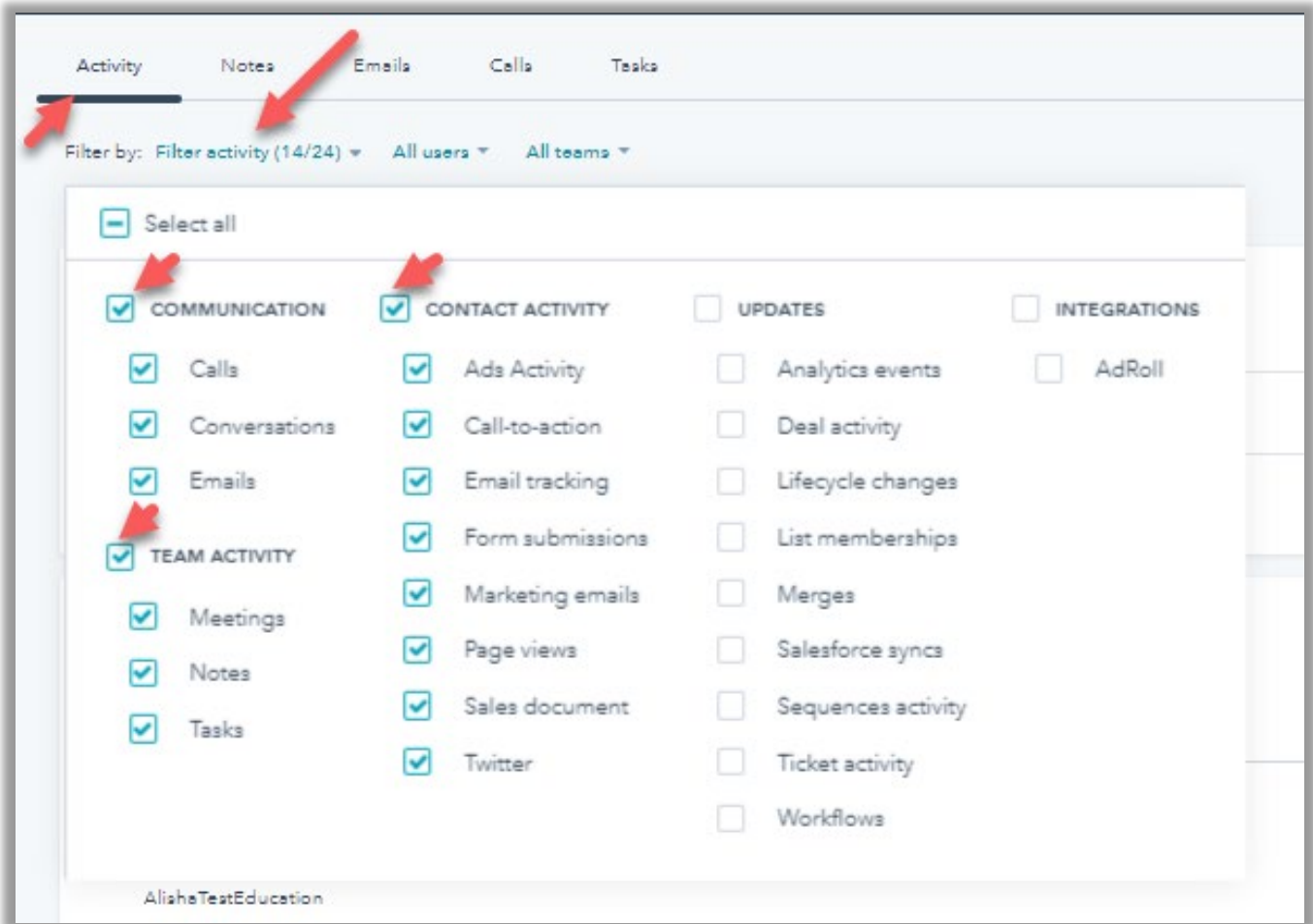
6. Review some of the activity that is shown for contacts.
   a. You can click hyperlinks to take you to the pages viewed or email **templates** used in the send.
   b. Activity can include:

i. SPC web page views.
ii. Form submissions.
iii. Emails sent with delivered, opened, and clicked information.
iv. Tasks assigned.

7. Review the "About" section to view the information available to you on your contacts.

Field Key

Email.

Email used by the contact when they entered the web RFI. It is the key ID for records. There may be a record for the same person with a live.spcollege.edu email address if they already applied. Disregard those records. They are only used for College email sends.

Phone.
This is the number you call if you are assigned the call task.

Active Application.
The goal for Inquiry to App is for this field to show "Yes." "Yes" means this person is eligible to register, i.e., they have completed the inquiry to app part of the enrollment funnel. The field will show yes if ANY of the following are true.
- The person applied within the last two years.
- The person reapplied / was 'readmitted within the last two years.
- The person enrolled in the last two years.

In general, you are focusing on encouraging contacts to Apply. If you see that someone has already applied but Active Application = No, then you are encouraging them to Reapply. If a person is already an active application, and you received a task, they did request a phone call and will be expecting one. Call them to answer any questions but let them know that they have been assigned an advisor and should make an appointment with their advisor for help to get enrolled.

Apply Date.
Date of application. Will show **1/1/1900** if they have NOT applied.

Reapply Date.
Date of readmit. Will show **1/1/1900** if they have NOT readmitted.

Last Enroll Date.
Date of last enrollment. Will show **1/1/1900** if they have NOT enrolled.

Student ID.
This will be populated if they have applied. Remember that it could have been more than two years ago, in which Active Application = No.

Last Web Inquiry Date.
The date the person last filled out a web RFI. If the person requested a call, this would be the date the task was assigned to you.

Inq to App Advisor.
This does not change. It should be you. This is the "owner" field used for reporting.

Inquiry Source.
This is the main method of receiving this inquiry. In your case, it should show "web," because the contact filled out a web request for information.

Inquiry Secondary Source.
This gives you more information on where the person filled out the RFI. Pay attention to it and use it in your conversation. Examples of what you may see there:

- A program, such as "Elementary Education B.S. Degree." This means that they were researching the program and filled out an RFI on the actual program page.
- FUSE. They complete the form on the FUSE page.
- IGNITE. They completed the form on the IGNITE page.
- FOCUS2. They completed the form to access the FOCUS2Apply career exploration tool. This tool gives them information about potential career matches and SPC aligned programs. Ask them about their results!

Area of Interest.
This is the area of interest that the person selected on the form, aligned with academic communities. Each week, welcome packets are sent out based on area of interest.

Inquiry Program.
If the individual was on a specific program page when they completed the form, that will show here.

Prospect Type.
This field indicates how the prospect describes themselves, e.g., International student, Returning student, etc.

NOTE:

When you encounter the delete option on anything, **DO NOT delete.** This will cause discrepancies in reporting between reporting mechanisms. If there is a reason for any contact, or anything else, to be deleted, notify vitale.alisha@spcollege or essix.shirell@spcollege.edu .
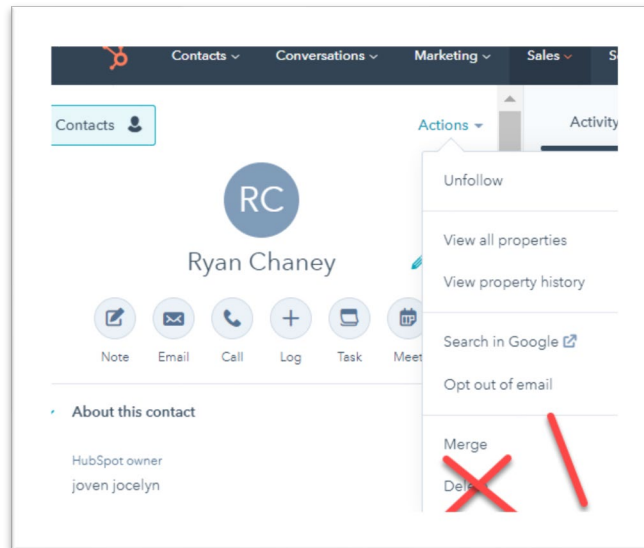
Three: Tasks

1. Call tasks are assigned for web inquiries that have requested a call.

2. To find them, click on "Tasks," on the top of your screen. Then select the "Table" view.
3. Select "Open tasks," and then your name.
4. Note that if you are working more than one process, the title of the task will be important.
5. You will then see your list of open tasks. Click on a **name** to work a task.
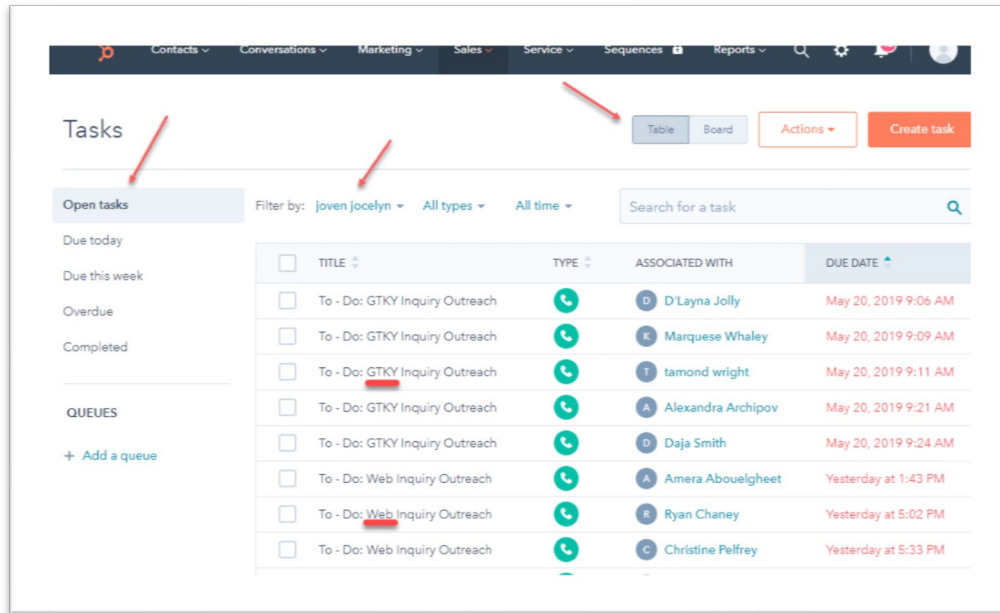
6. Review the information about the contact in the "About" section and the "Activity Feed" first to find out all about the person.

7. Keeping the goals in mind, make your phone call or email. (See page 13, section 4.)

8. When you are done with the call, log it by clicking on "Log," and selecting "Log a call."
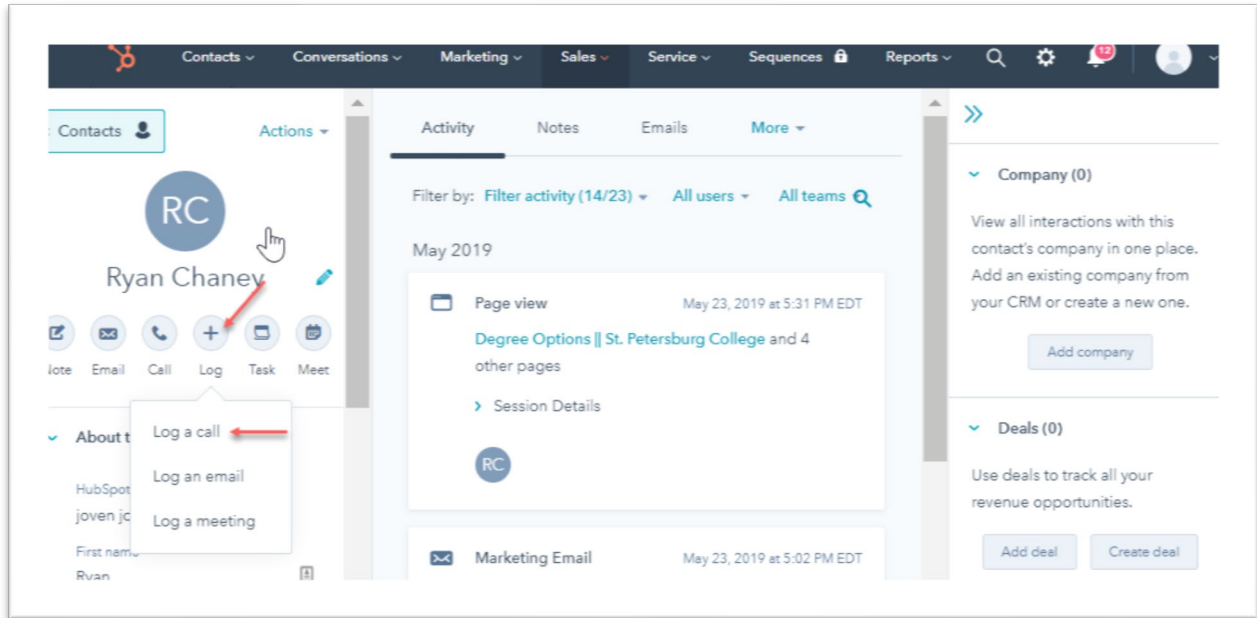
9. Select the appropriate outcome, enter notes, and then be sure to select "Log Activity" to save.
   a. The disposition "Connected" means you spoke with the person.
      i. ALWAYS include notes for that to describe what you talked about.
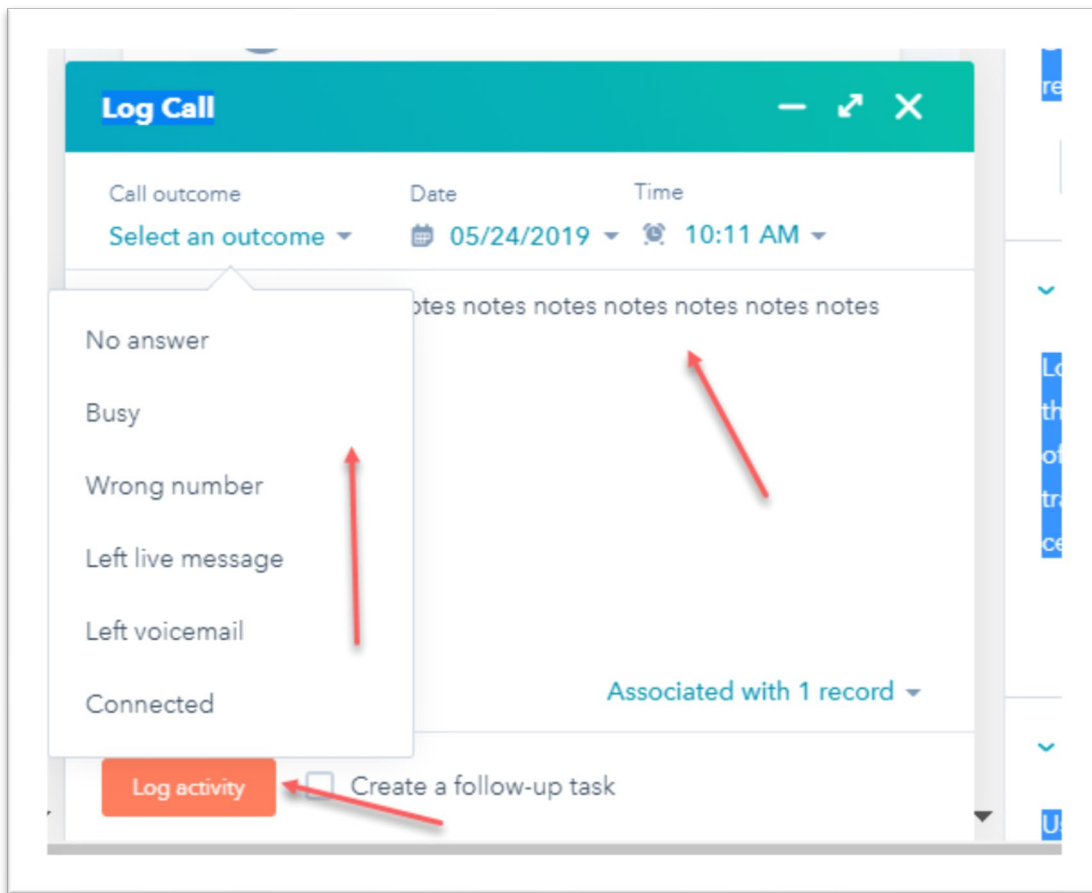
10. Mark your task as complete, by moving over to the "Task" area of the contact record and clicking on the checkmark circle to make it green.
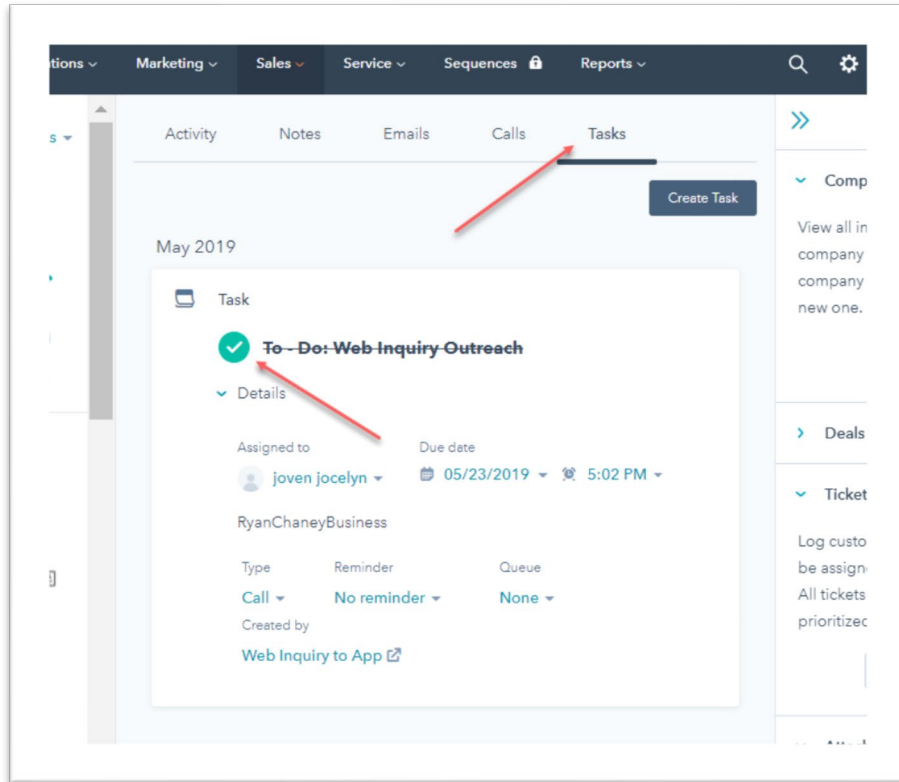
The expectation is that you will be making the phone calls every day. Make sure you have reviewed all of the person 's info, including SPC sites they have visited and the secondary source information first.

The goals.

The purpose of the call is to make a connection with the prospective student. With your call, you want to:

1. Find out what their current situation and past educational and work experience.

2. Learn about what they may be interested in.

3. Discover any obstacles you might be able to help them through.

3. Let them know that you are their correct, first contact and that they can call you or email you anytime to ask questions.

4. Encourage them to apply now so that they can get any to-do items done so they can register in time for the classes they need, at the times and locations that will work for them.

5. Make sure they know exactly how to apply.

6. Show them that you care about them and their future.

Sample Scripts to Get You Started

Voicemail content.
Hi, this is _____from SPC. I understand that you recently completed a form for more information about SPC. I wanted to connect with you personally to let you know that I am your pre-admissions advisor, so you'll know who you can call when you need help or have questions. It would be great if you could all me back at _____, so we can talk more about SPC and so I can answer any questions you might have.

Call content.
Hi, this is _____from SPC. We got your request for information about our _____ program. I wanted to connect with you personally to let you know that I am your pre-admissions advisor so you'll know who you can call when you need help or have questions.

So, are you still narrowing trying to decide which college you will attend?

Continue the conversation keep the **GOALS** in mind.

What if the person is already an active applicant?

Call them in any case. Individuals that trigger tasks for you have asked to be called and may have questions. You can also take the opportunity to inform them about their assigned app to enroll advisor. Advise them to make an appointment with their advisor.

Other resources.

You will need to be a researcher to continually gain knowledge about SPC to help your inquiries.

The best way to do this is to communicate often with your academic and career advisor colleagues and be familiar with all of the information found under "Future Students" on our web site.

Inquiries will want to know everything from specific program requirements, to where the application page is. Be aware of the different types of applications (the main one being the New Undergraduate Student application.) Read about residency requirements.

Remember that you cannot always answer all questions, but you can be a good researcher and know that SPC has a great case management system. So; once your inquiry applies, they will be assigned an academic advisor that can answer all their additional in-depth questions. This is template for the email they receive upon application.

Five: Optional Additional Interactions

1. To attach the emails that you send to your inquiries to their record.
   a. Paste 3793416@bcc.hubspot.com into to the BCC line and the email will appear in the contacts activity area.
2. To forward incoming emails you receive from your inquiries forward the email to 3793416@bcc.hubspot.com .
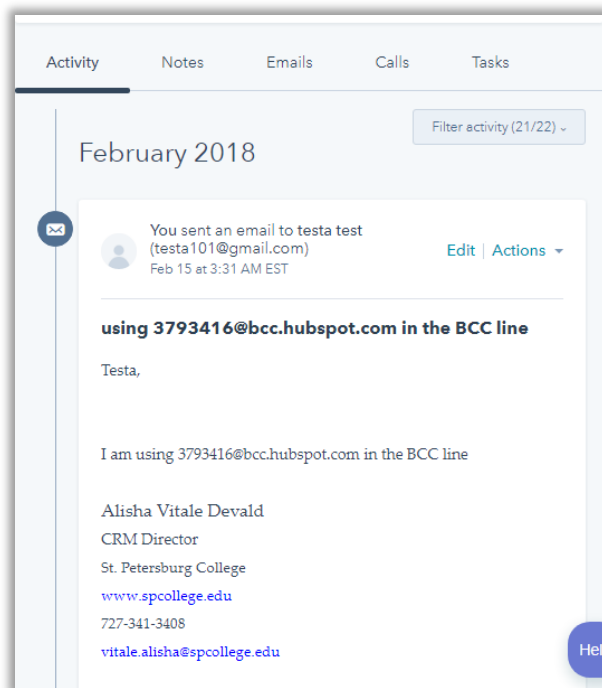
3. To make notes on additional incoming our outgoing phone calls relevant to inquiry to app, make a note!
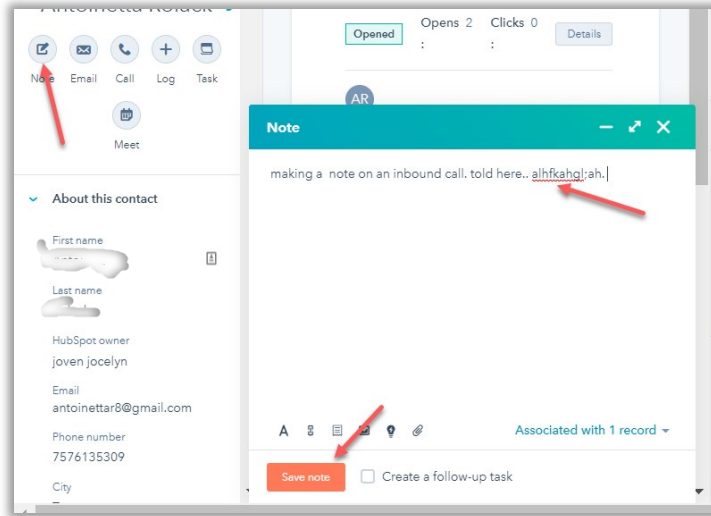
4. Create follow up tasks for yourself. They will appear on in 'Open tasks' on your task list and you will get an emailed task reminder.
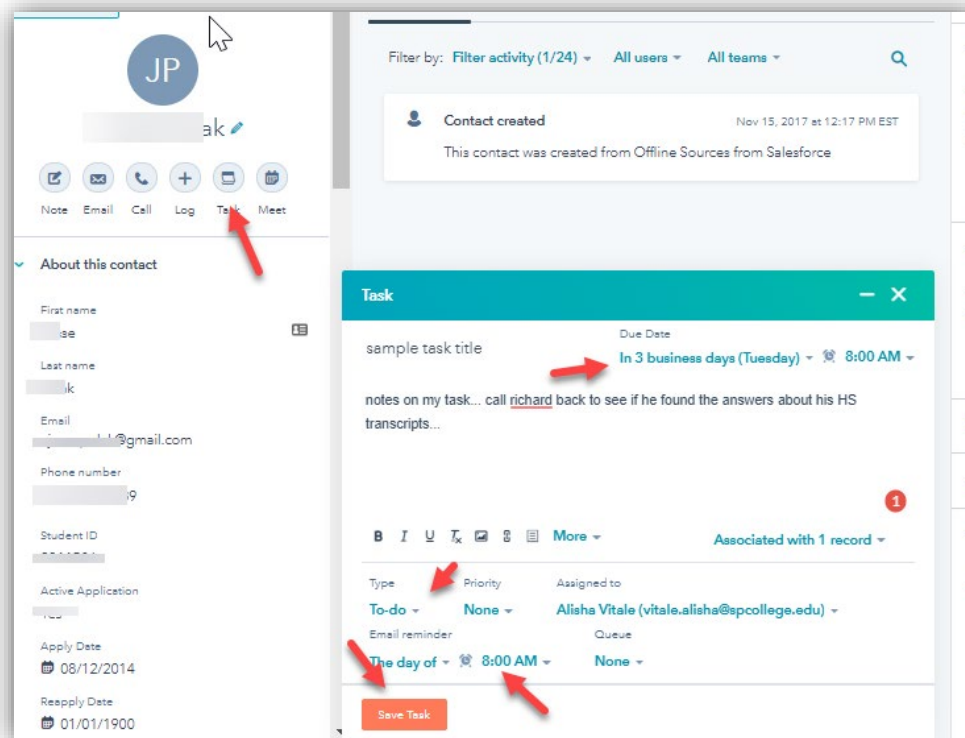
5. Email your contact directly from the record.
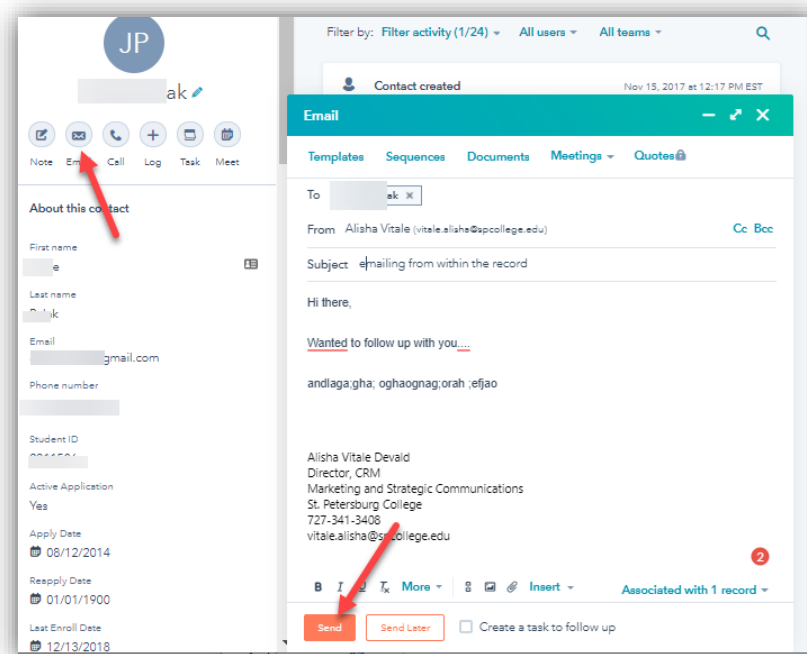
Six: Automated Communications

1. Every time you are assigned a task to call, you will receive an email that looks like this -

HubSpot

You have been assigned the task "To - Do -- Outreach to Web Inquiry"

testtripleCommunications

TASK: To - Do -- Outreach to Web Inquiry

DUE DATE: 12 February 2018 at 1:39pm

CONTACT
test triple
triple333@gmail.com
7777777777

Emailed notifications are sent to you for every new task you receive as well as new contact assignments, whether or not they requested a call. To turn off notifications for contact assignments:

- *Navigate to your profile icon, select "Profile and Preferences," then "Notifications."*
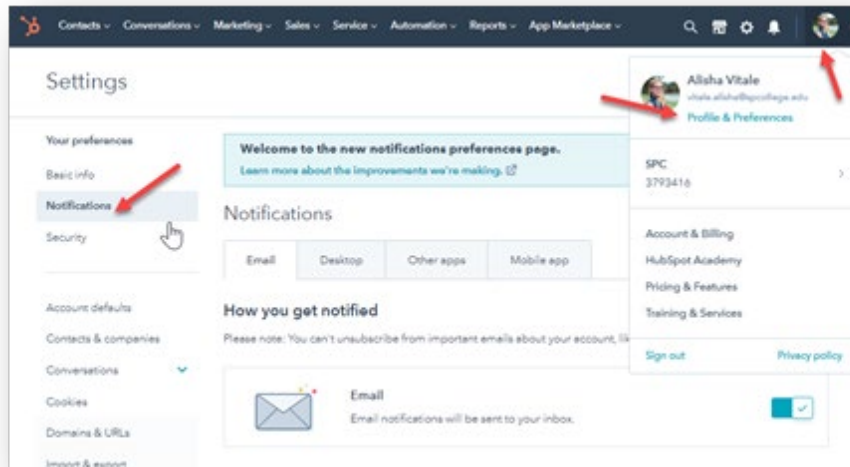
- *Scroll down, expand "Contacts and companies", deselect "Contact assigned to you", and hit Save.*
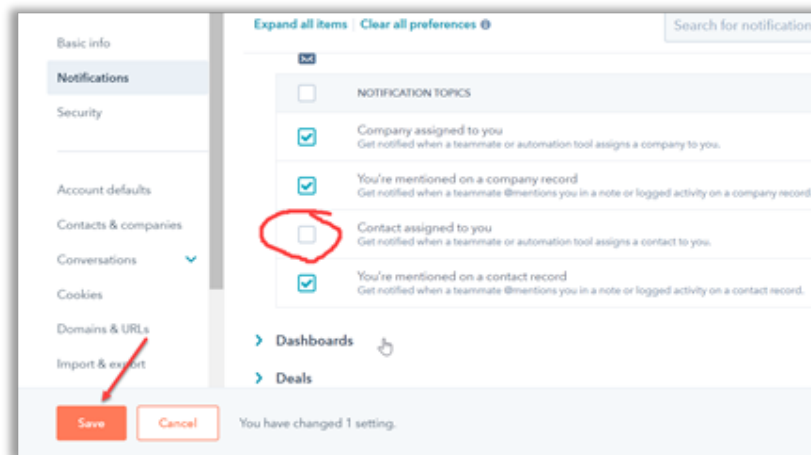
2. On Day One, inquiries receive an email like this -

Hi Student!

I'm Alisha, your personal pre-admissions contact.

Thank you for your interest in our Degrees program. As requested, a packet of information tailored to your interest is on its way in the mail.

Choosing the right college can be both exciting and challenging. As your personal admissions advisor, it's my job to make sure you have all the tools you need to be successful and to make the transition to St. Petersburg College as seamless as possible. The first step is to apply. It only takes about 10 minutes. I am pleased to answer any questions you may have and I look forward to talking with you.

727-341-3400
Email: vitale.alisha@spcollege.edu

APPLY NOW

Titans Live Webinar

Attend one our next interactive Titans Live Webinar to learn more about our application process, how to find classes that work for your schedule, ways to pay for college. Get all of

- The email contains your name and email address. In addition, the "from" email address is your SPC email address.

- The phone number is the main 3400 "pre-admissions" phone line. This ensures that the caller will receive a live person. Be prepared to use the SPC contact directory to provide the requested advisor direct line necessary.

- !! You will receive emails and calls from inquiries assigned to you, even if they did not request to be called (were not assigned as a "task.")

3. Additional emails are sent from YOU to individuals where active application = No, on Days 2, 7, 11, and 14.
   a. Remember that you can click into emails on activity history to see their content.

4. A survey email is sent out from YOU day 20. You will get a copy of each submission made by one of your inquiries for feedback on your service.
   a. This is what the 20-day survey email looks like –
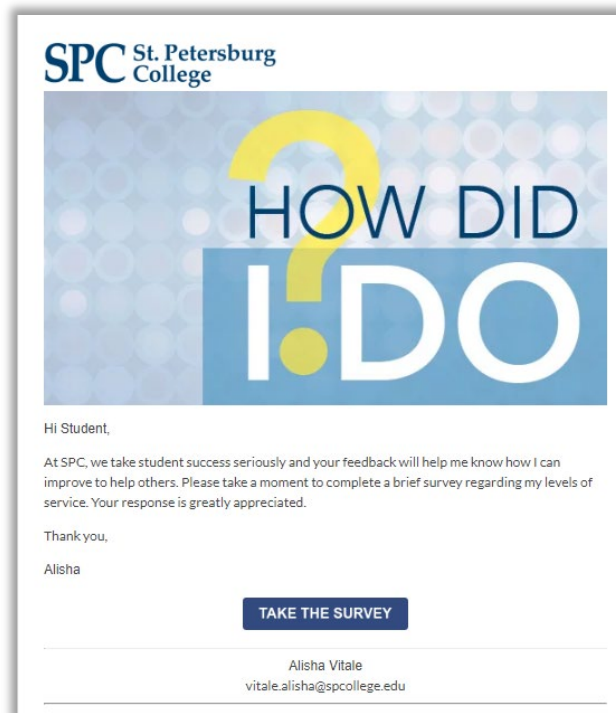
b. This is what the survey looks like –

How did I do?

Please take a few moments to:

- Rate my performance in each area.
- Provide any other feedback.
- Help me learn how to best help others.

Professional*
(1 = least effective, 5 = very effective)
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ⦿ 5

Informative*
(1 = least effective, 5 = very effective)
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ⦿ 5

Responsive*
(1 = least effective, 5 = very effective)
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ⦿ 5

Helpful*
(1 = least effective, 5 = very effective)
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ⦿ 5

Knowledgeable*
(1 = least effective, 5 = very effective)
- ○ 1
- ○ 2
- ○ 3
- ○ 4
- ⦿ 5

What else would you like to share?

Enter your email address.*

Submit

5. Another survey email is sent out from YOU for inquiries where active app = No after 30 days. You will get a copy of the submissions. Many times, people ask for extra help in the comments section. If this is the case, please reach out to help!

   a. This is what the email looks like –

b. This is what the survey looks like.

It's been 30 days since I reached out to you.

What is preventing you from applying?

Please take a few moments to complete this form so that I can better understand how to serve our potential students.

- Check all that apply.
- Add additional information.

Check one or more reasons you have not applied to SPC.
☐ Financial reasons
☐ Course availability
☐ SPC application
☐ Decided on another college
☐ Other

Please provide your "other" reason or any additional information you would like to share.

Enter your email address.*

SPC needs these contact details to provide information about SPC and our offerings. You may unsubscribe from these communications at any time by clicking "unsubscribe" at the footer of our emails. For information on how to unsubscribe, as well as our privacy practices and commitment to protecting your privacy, check out our Privacy Policy.

Submit

c. Occasionally, you will receive an email with survey submission information if one of your inquiries submitted the form with comments. The subject line says '30 Day Inq, No App Submission." This is what it looks like:
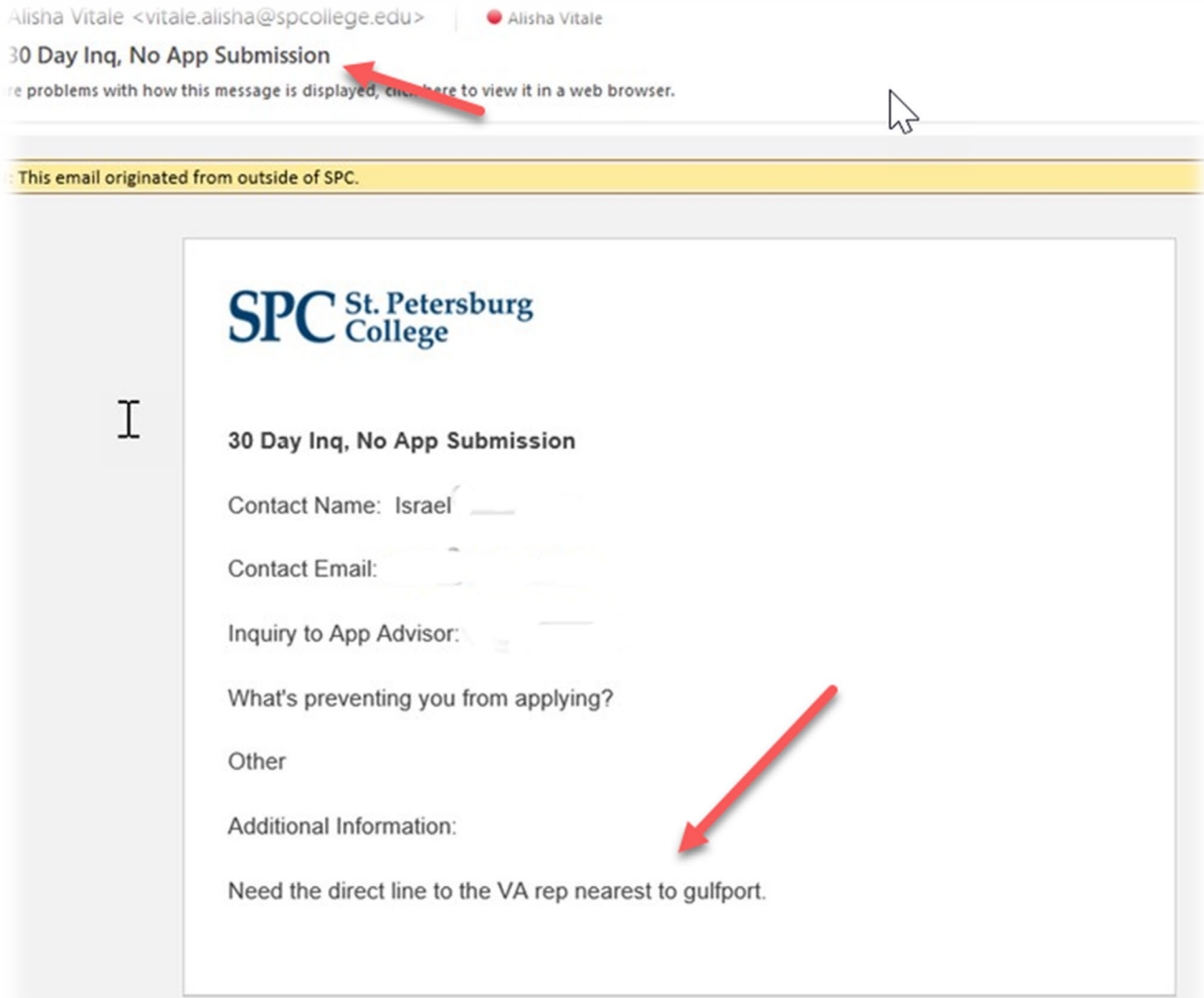
d. In most cases, the comments are really a request for additional help.
   1. Respond to those. And log your call or email, whichever is most appropriate, the same way you log a call with your tasks.

Five: Additional Notes

1. For help or questions about using HubSpot for Inquiry to app:
   - i. Contact Alisha Vitale and/or Shirell Essix and/or other end user colleagues in HubSpot CRM Teams > End Users Channel, or their office contacts.
     1. If you provide an explanation along with any screen shots or contact links, it will help us answer your question more quickly.
   - ii. Please contact Alisha or Shirell if you or your colleagues would like additional one-on-one training or help.
   - iii. In emergencies can also text Alisha @ 727-432-0708.

2. Changing your password:
   - i. You can change your password by going to your person icon, selecting "Profile and Preferences", going to "Security", and "Password" > "Change Password"

3. Reporting.
   - i. A conversions report is updated every Friday. It contains information on the conversion rates from inquiry to app (measured at 30 days), as well as numbers showing tasks that have not been completed for the prior week.