Process Name: Follow-up Contact with Prospect
Date: 12/1/05
Time: 3:30 pm
Location: BAB 203
Participants: Saul Garza, Gregory M. Schwab
Session Lead:

Narrative/Description: Information on prospective students from various sources, including phone contacts, walk-ins, e-mail inquiries, school visits, recruiting trips, purchased lists, are extracted into a focus report, using a filtering tool, and converted into a excel file.

Daily, a focus report is used by the recruiting staff to extract a particular prospect list in order to communicate to the potential students either electronically, by phone, and/or by mail. The following day an electronic or physical letter will be generated and sent to the prospect.

Weekly, using a focus report, lists of prospects by academic program and by extracurricular interests are generated and distributed to the appropriate departments or programs.

Currently the system will generate the first contact letter, after that the recruiting staff must pull a focus report in order to follow-up with each prospect for specific events, such as Preview Nights and Sully’s Super Saturday, and to distribute information, such as scholarship deadlines, housing information, and upcoming school visits, and to contact the prospects by telephone.

Currently, the recruiting staff manually logs in when each report has been generated.

Electronic Inputs: SAT/ACT prospect lists;

Manual/Paper Inputs: Next Step prospect lists; College Bound prospect lists, e-mails/web requests for information; inquiry cards; phone inquiries; mail inquiries; National Hispanic Institute prospect lists;

Key Decision Points (list all): Excel is used for tracking management system. Screen 2e5 in SIS system flags initial date of contact and coding for various types of sources. (Visitor, walk-in, phone contact) etc.

Related Policy(s): None

Interface to Other Systems: Data is downloaded into mail merge format; or excel format

Web Features: Request for information online

Electronic Outputs: letter generation; daily; emails to prospects

Manual/Paper Outputs: letter generation; mailing lists;
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Business Process Analysis – Student Module

Customer(s):
Prospective students; SRSU academic departments and programs; administration and staff

Regulatory Items:
None

Frequency/Volume:
follow-up cycle is ongoing; limited; by request only

Potential Break Points:
poor real-time recording on excel file; no automated reminders to run reports or send letters; inability of system to automatically generate letters/contacts beyond the initial letter

Automation:
Limited

Issues:
system is capable of automatically generating only one contact per prospect; creating focus reports in time-consuming and not user-friendly; system needs an automatic timeframe for follow-up contacts; to develop geographic focus reports multiple steps must be used; staff keep a notebook for follow-up or repeat the steps of pulling reports each time. Staff is dependent on a name list for follow-ups. It is not known that the system can automatically notify recruiting staff if a prospect needs a follow-up. We lack a tracking system to record when last time it was we corresponded with student via phone; letter; email; etc.