Maximising direct bookings using best practices, automation and CRM technology

Philippe Taza CEO
Higher Education Marketing

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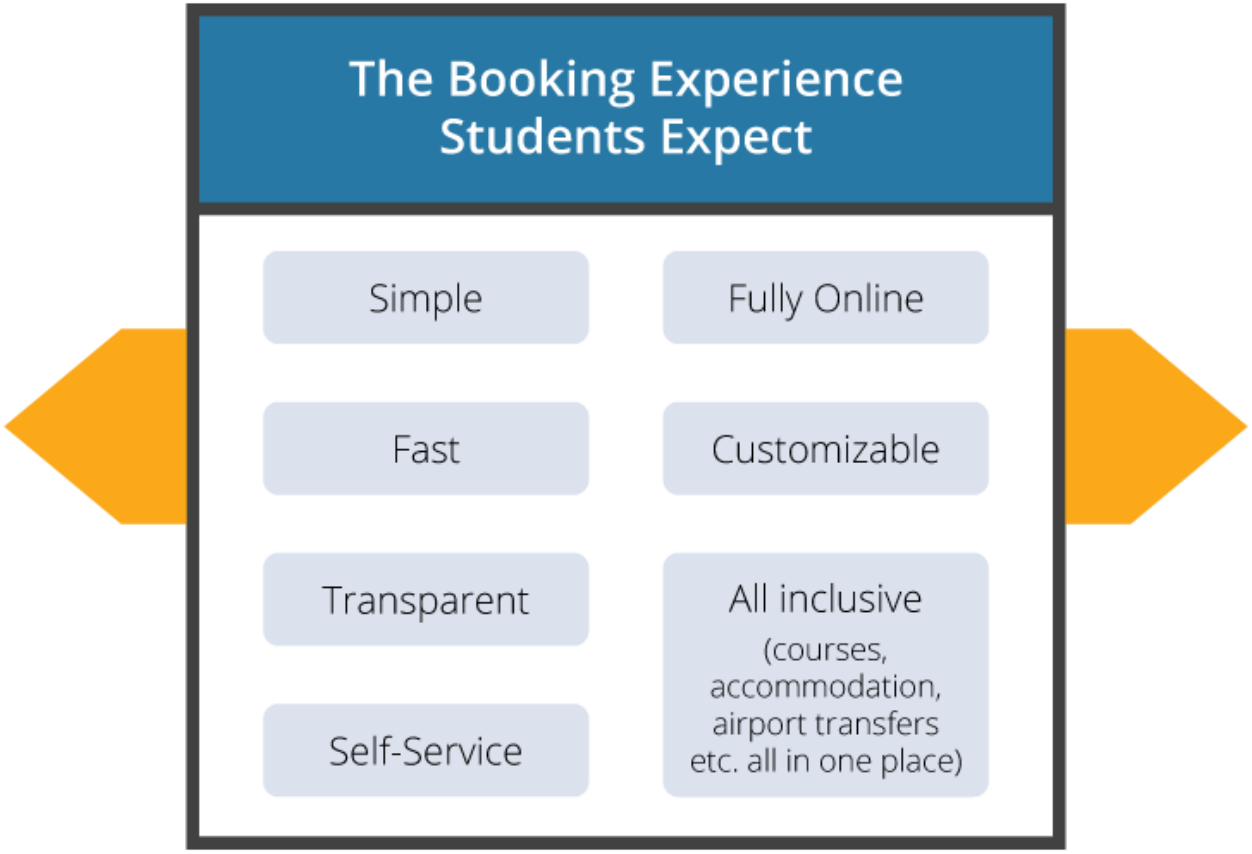
DATA-DRIVEN STUDENT RECRUITMENT SOLUTIONS

Google Partner

Today's Presentation

- Delivering the Online Booking Experience Students Expect
- Common inquiry channels
- Nurture contacts using Marketing Automation
- Using CRM to support your Admissions Process
- Reporting

Delivering a Modern Booking Experience



Language Schools need to provide the **same standard of service** as other online businesses.

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Common Features of a Booking System

Application Builder

Quote Calculator

File Uploads

Agents Gateway

CRM Integration

Payment Gateway Integration

Booking/Quote System Options for Schools

Class Systems
Language School Software

Fidelo
Software

HEM Application
Portal

CoursePricer

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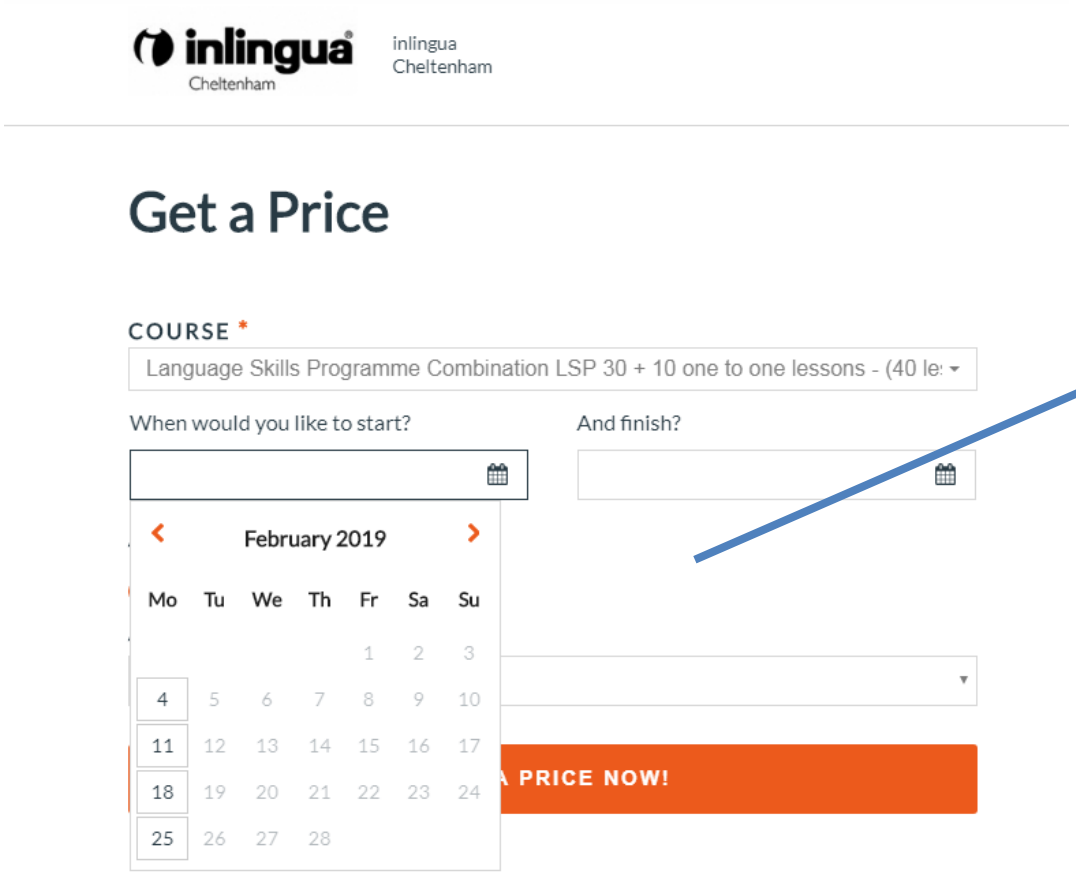
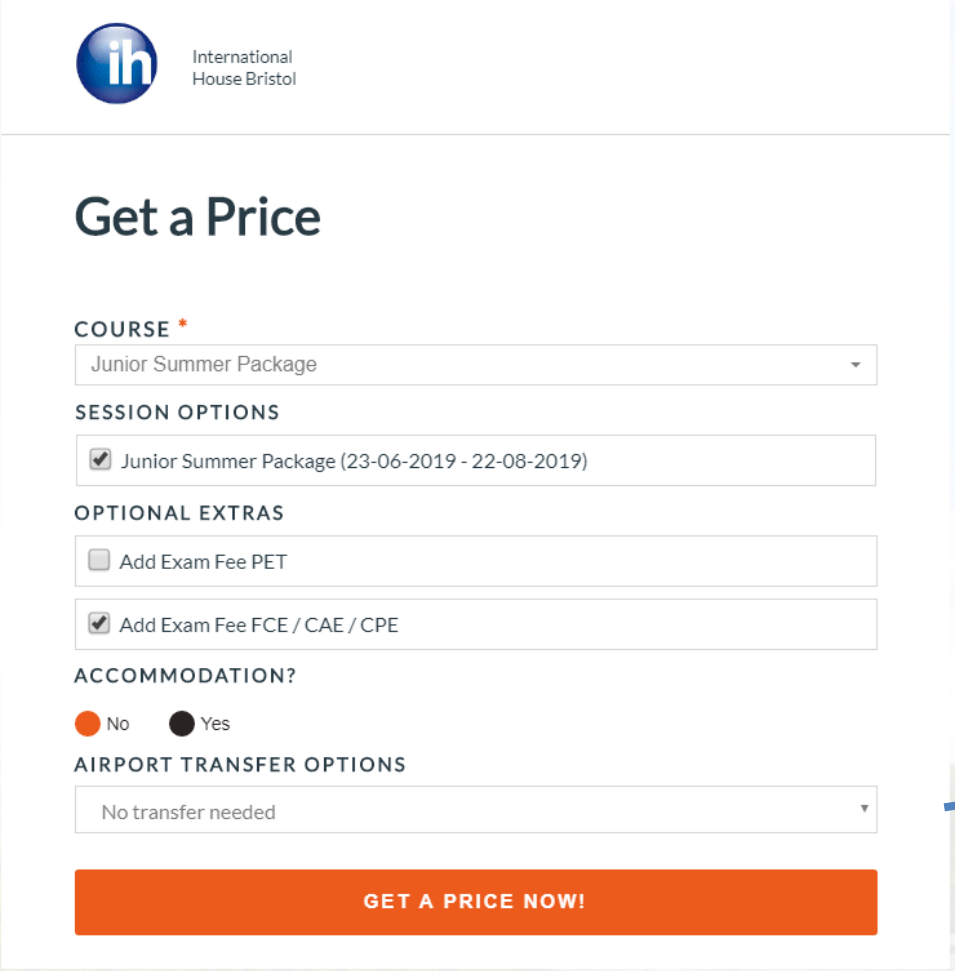
Creating Online Quotes



Offer multiple dates (factor in price adjustments for high season)

Include Optional Extras



Factor in exams and extra course fees

Add accommodation and travel transfer options to give students an all-inclusive price

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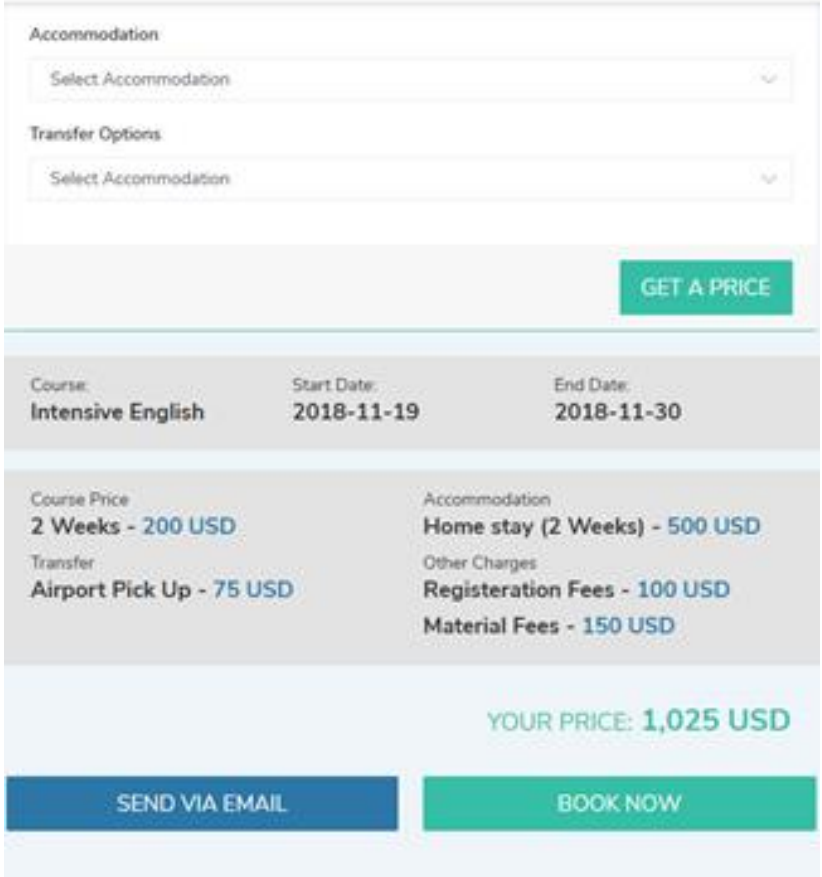
Personalized Quote Breakdown



Students can choose to proceed to booking or have their quote emailed

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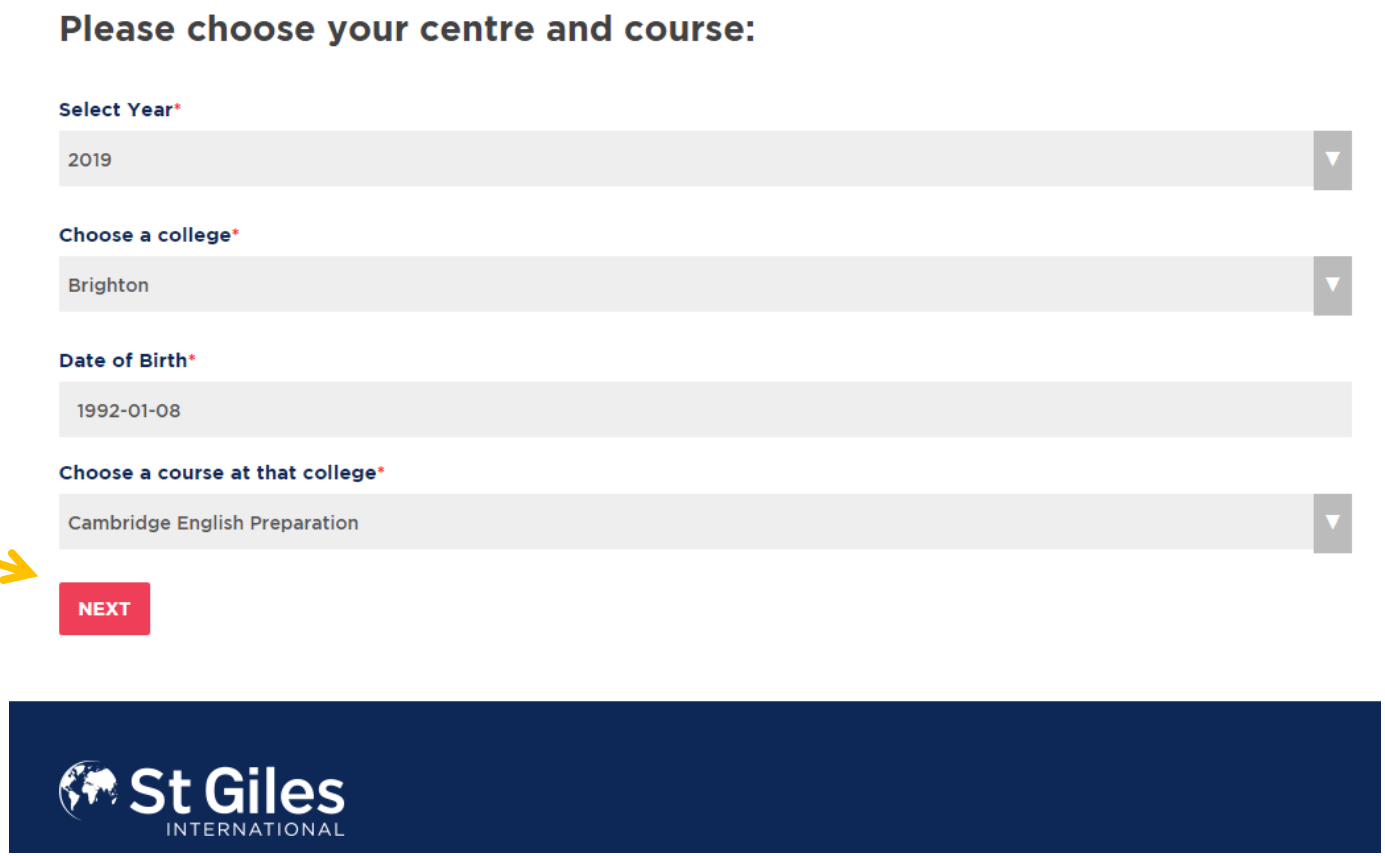
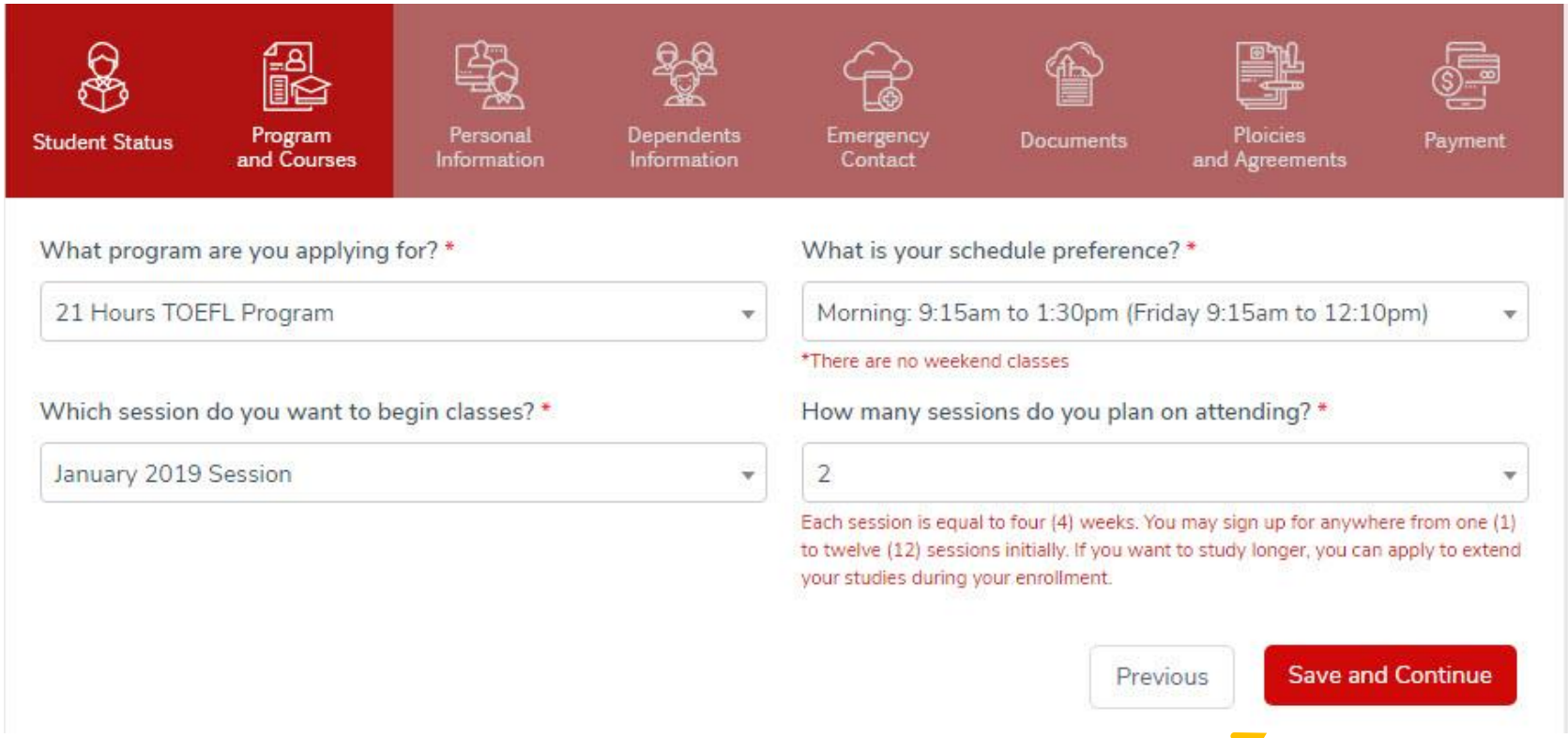
Use a Step-by-Step Application Process

Include as many steps and form fields as necessary



Build Flexibility into Your Booking Forms



User can abandon mid-application and save progress

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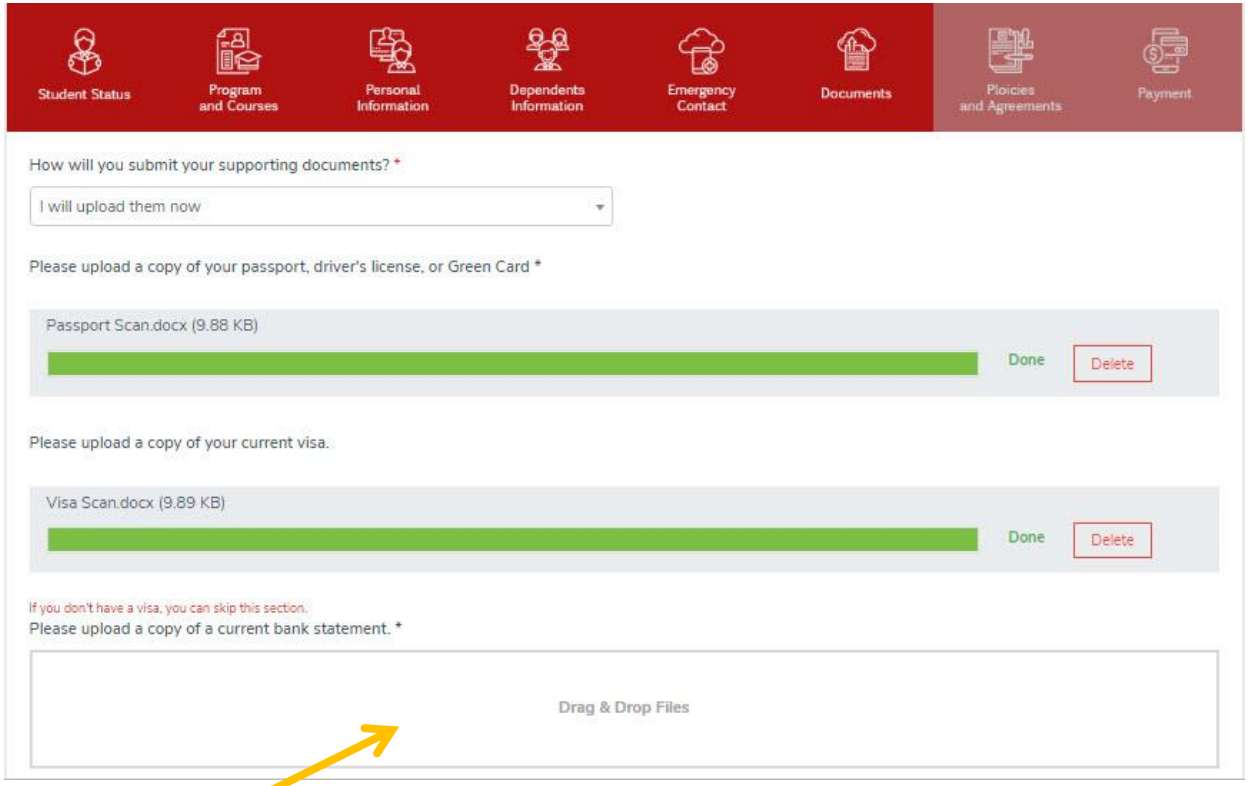
Allow for Document Uploads



This Application Form supports all common file types (PDF, doc, jpg etc.)

Documents can be uploaded via an easy drag & drop system

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Include Relevant Terms & Conditions

Acknowledgment of Terms & Enrollment Agreement

I have read and understood the policies and procedures outlined in this application. By submitting this form for enrollment at Boston International Academy, I agree to comply with the registration, payment, and refund terms outlined in this application page.

By agreeing to the terms of this agreement, I acknowledge that I have been given reasonable time to read and understand its contents and received information explaining the courses, policies, and procedures of the school.

Please maintain a copy of this agreement in your records. No payments from the student will be accepted by the school until this agreement has been submitted by the student.

Please Note: If you need this application to be translated or clarified, we will provide you with a translator or translated copy.

Do you accept the terms and conditions of this enrollment agreement? *

☑ Yes, I agree to the terms.

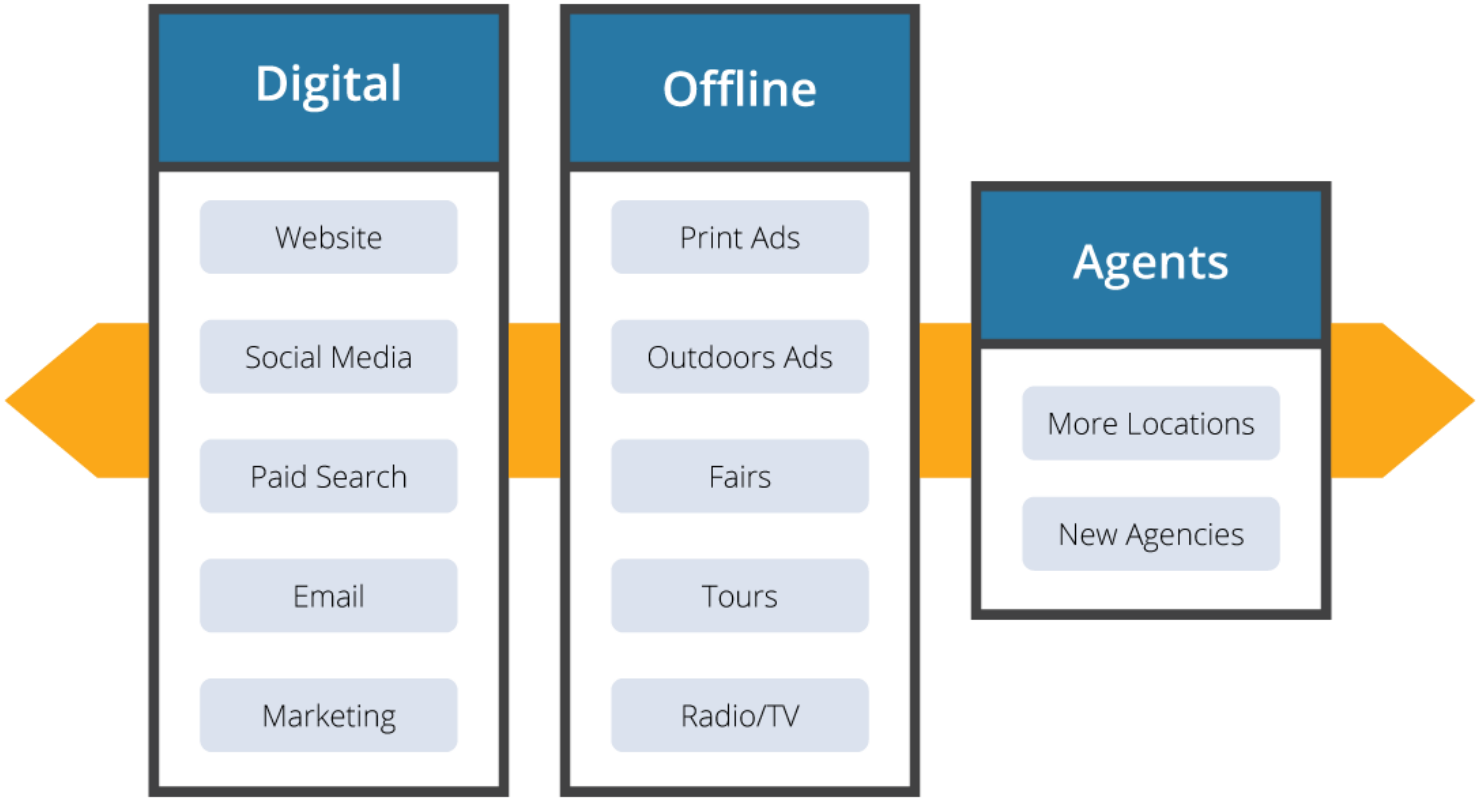
Signature *

Please use a mouse or finger or other devices to draw your signature.

Previous | Save and Continue

E-signature option allows students to complete entire booking online

What Are The Main Recruitment Channels?



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How Digital Marketing Attracts New Students

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CALLS-TO-ACTION

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Examples:

- Online application form
- Ask a question form
- Contact us form
- PPC inquiry form
- Online payment gateway
- Live chat event
- PDF brochure download event

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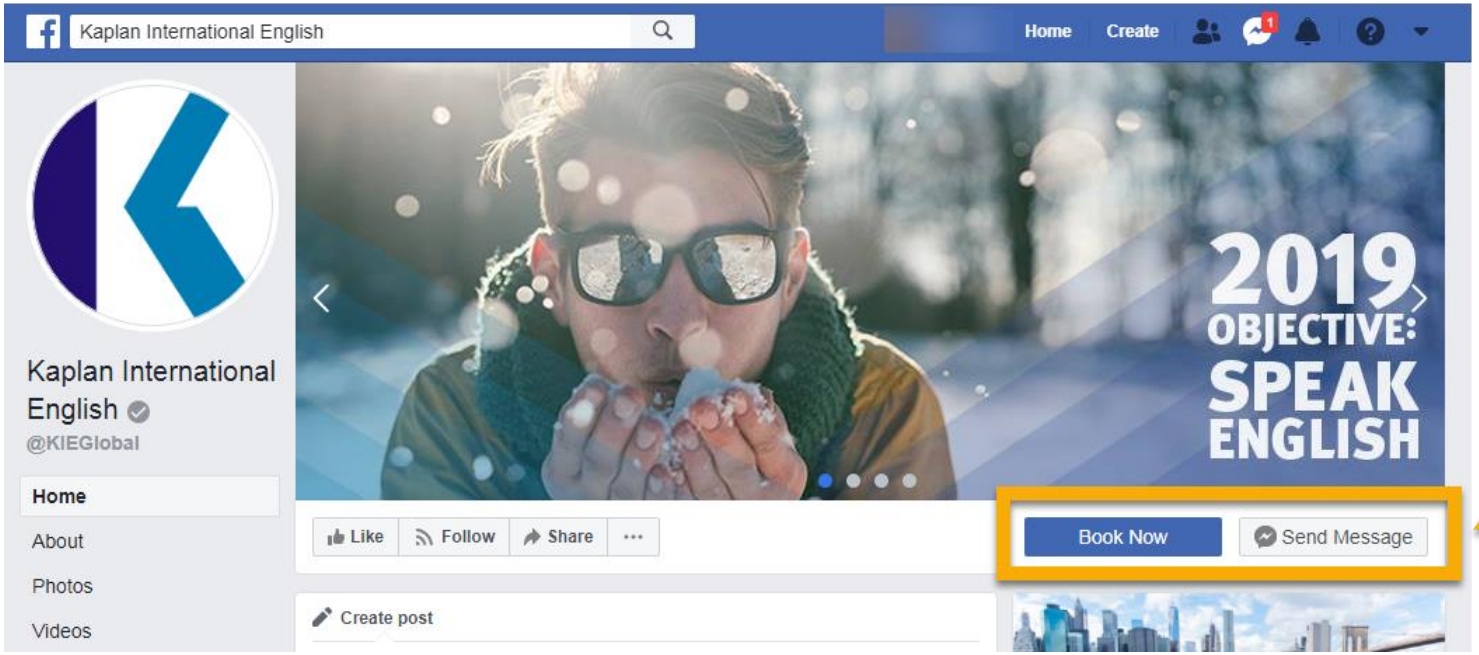
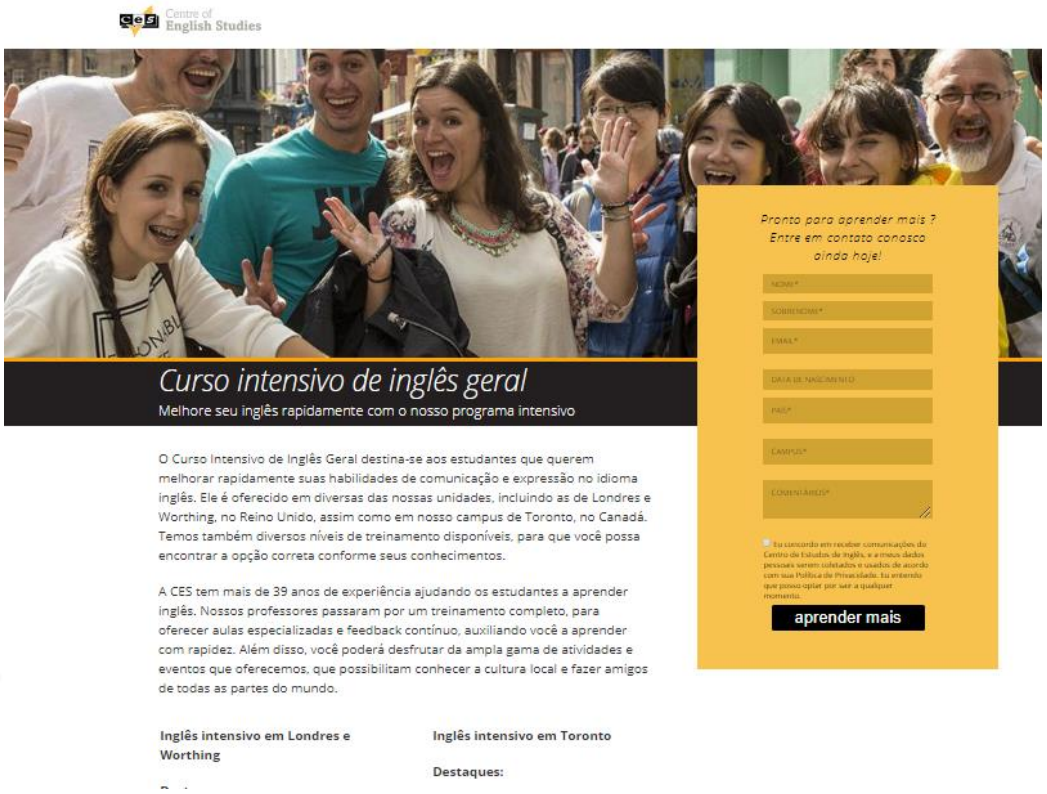
Driving inquiries on social media

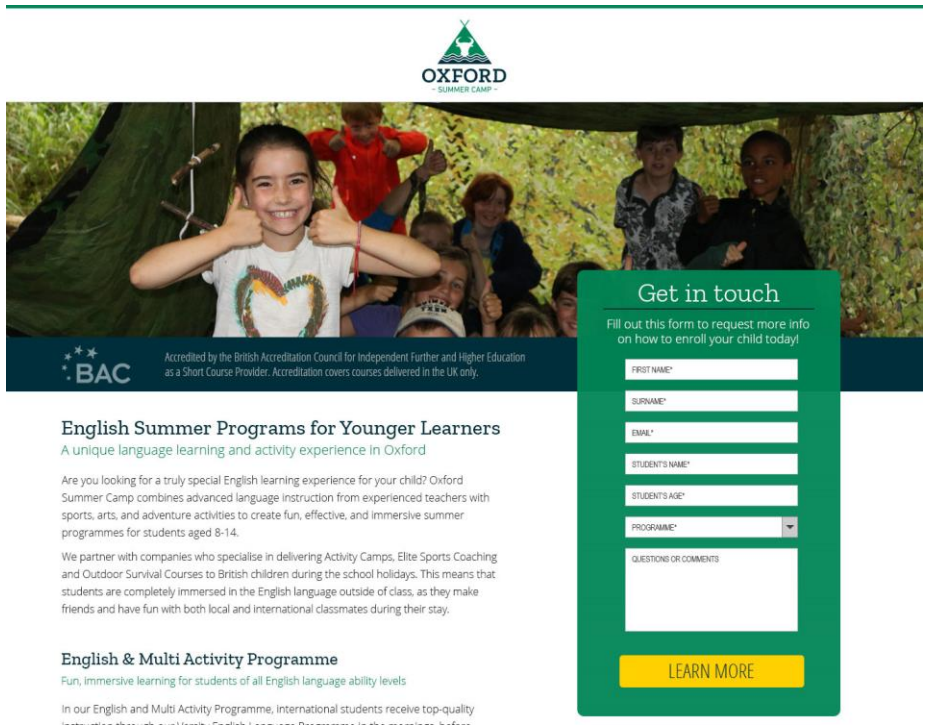


Creating Social Media Ad Campaigns



© Equals

Use Responsive Landing Pages



Desktop View

English Summer Programs for Younger Learners

A unique language learning and activity experience in Oxford

Mobile View

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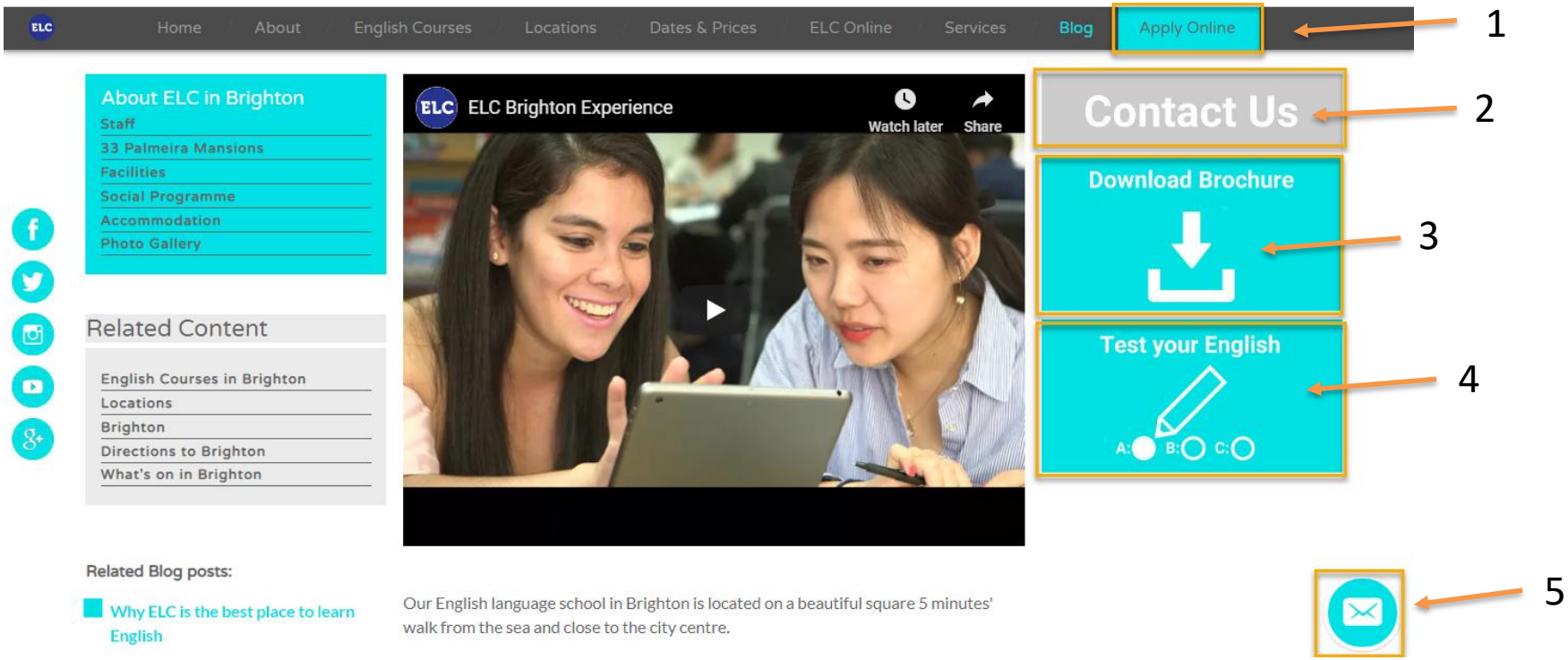
Using Calls to action on your website

This homepage has 5 calls to action:



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The Channel Report

	Default Channel Grouping	Sessions	% New Sessions	New Users	Bounce Rate	Pages / Session	Avg. Session Duration	Goal Conversion Rate	Goal Completions
		135,065 % of Total: 100.00% (135,065)	78.82% Avg for View: 78.75% (0.09%)	106,456 % of Total: 100.09% (106,364)	73.55% Avg for View: 73.55% (0.00%)	1.80 Avg for View: 1.80 (0.00%)	00:01:28 Avg for View: 00:01:28 (0.00%)	2.58% Avg for View: 2.58% (0.00%)	3,482 % of Total: 100.00% (3,482)
1.	Organic Search	**80,421** (59.54%)	84.91%	68,285 (64.14%)	70.12%	1.96	00:01:40	2.03%	1,629 (46.78%)
2.	Paid Search	**25,892** (19.17%)	76.71%	19,862 (18.66%)	91.25%	1.22	00:00:27	5.18%	1,342 (38.54%)
3.	Direct	**10,864** (8.04%)	75.11%	8,160 (7.67%)	69.91%	1.96	00:02:35	1.81%	197 (5.66%)
4.	Display	**6,235** (4.62%)	23.03%	1,436 (1.35%)	93.78%	1.09	00:00:18	0.63%	39 (1.12%)
5.	Referral	**5,556** (4.11%)	82.36%	4,576 (4.30%)	54.16%	2.18	00:01:54	2.29%	127 (3.65%)
6.	Social	**3,269** (2.42%)	83.54%	2,731 (2.57%)	38.91%	1.83	00:01:20	1.53%	50 (1.44%)
7.	(Other)	**1,685** (1.25%)	38.22%	644 (0.60%)	58.34%	2.50	00:03:11	2.61%	44 (1.26%)
8.	Email	**1,143** (0.85%)	66.67%	762 (0.72%)	53.98%	2.69	00:02:29	4.72%	54 (1.55%)

The **Channels** report under Acquisition, gives you macro level insights into the various channels you are using to attract traffic to your website.

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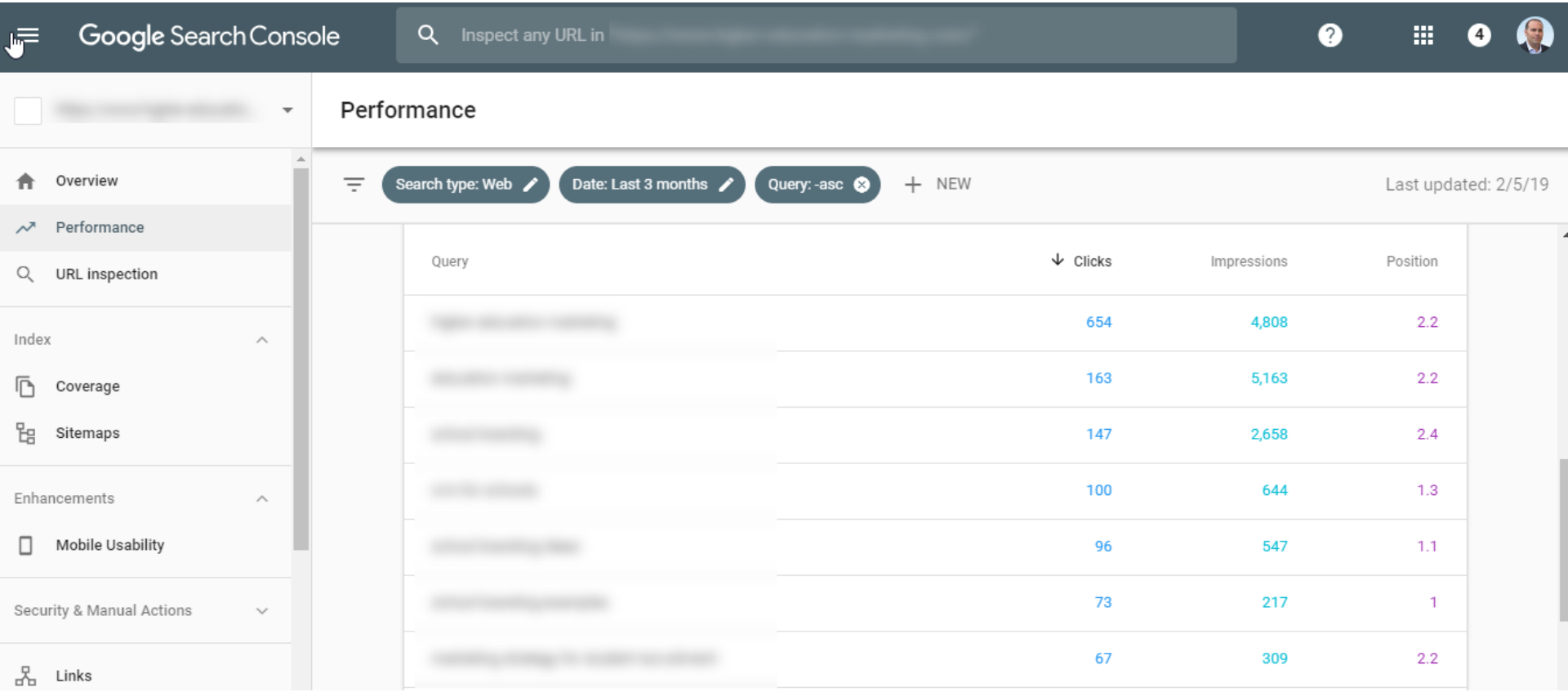
Monitor your SEO Keyword Activity



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Features of Marketing Automation Platforms

Email Marketing

Landing Pages

Lead Scoring

Campaign Management

Marketing Analytics

Integration

Marketing Automation Options for Schools

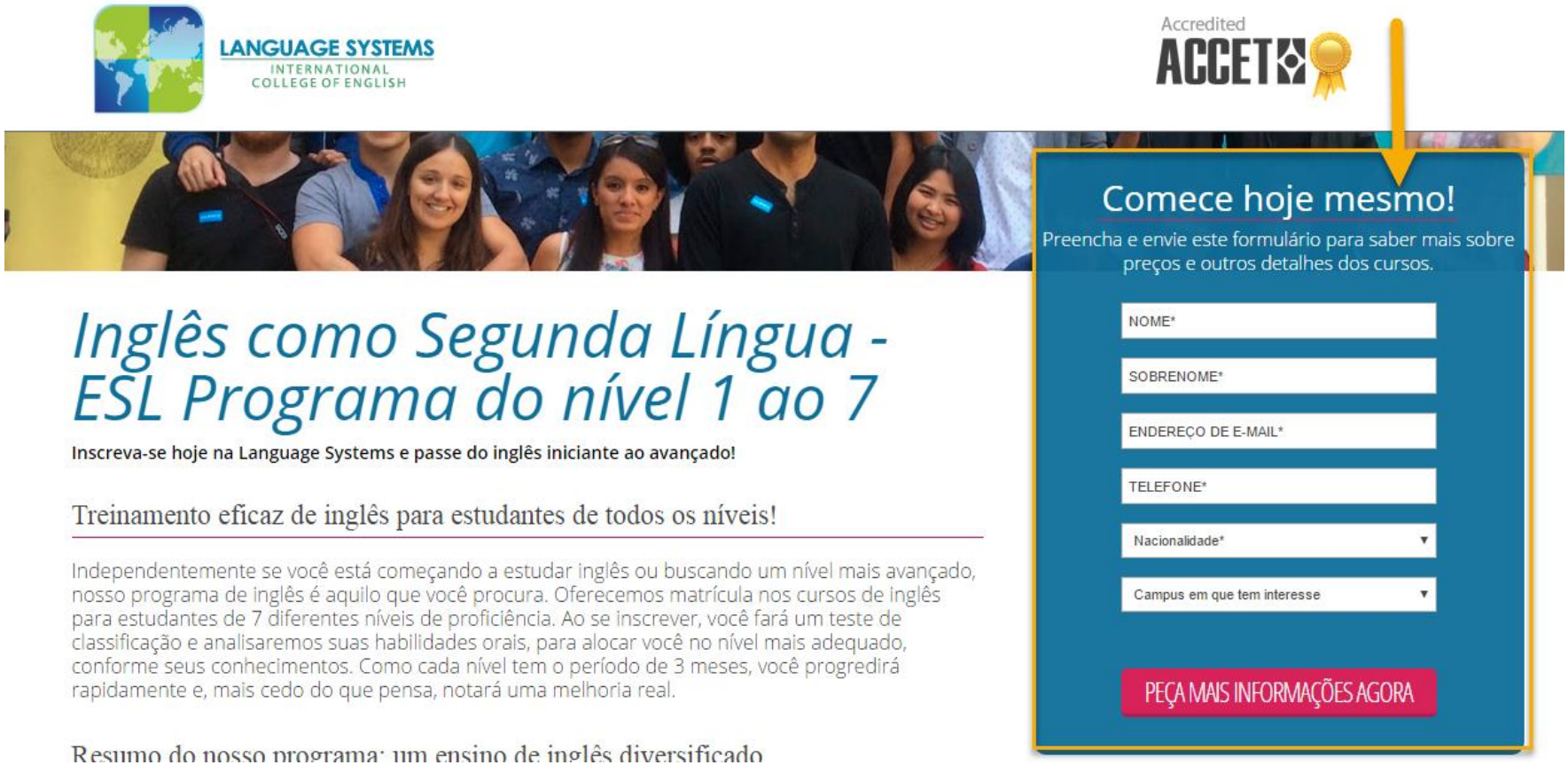
mautic

salesforce marketing cloud

Marketo™ An Adobe Company

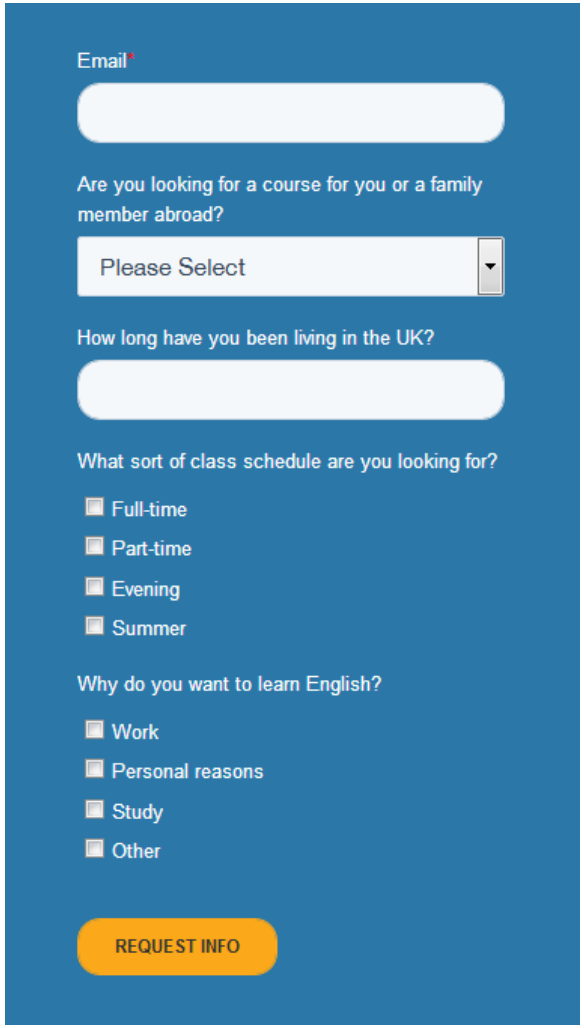
HubSpot

Use lead capture forms



Create Unique Forms for Local Campaigns

You may want to ask specific questions to local prospects



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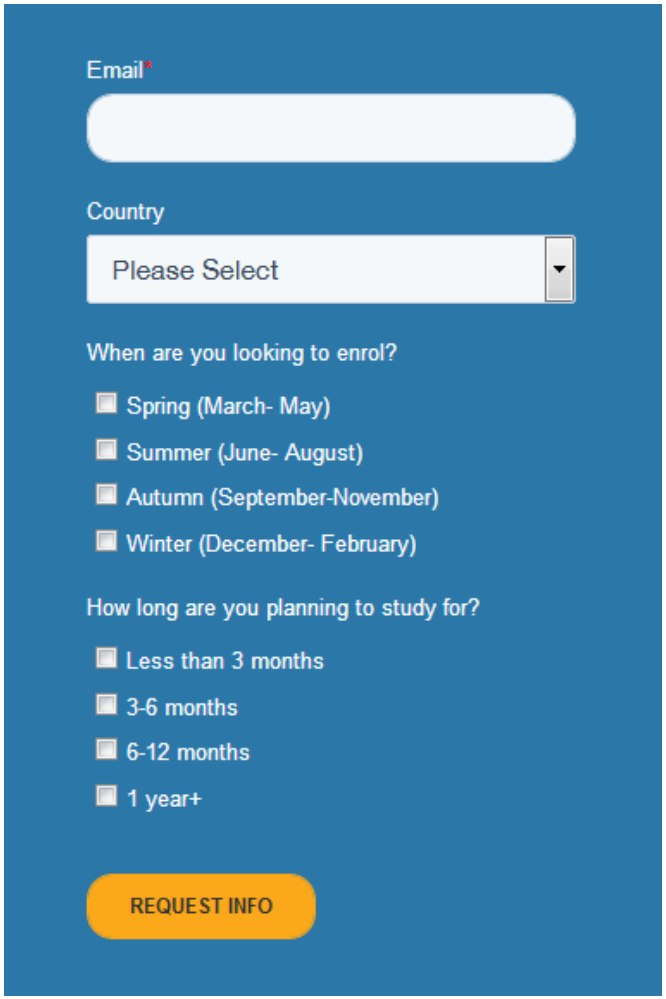
Create Unique Forms for International Campaigns

Collect different information for international prospects



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What is Lead Scoring?

Lead Scoring is a methodology that allows you to assign a numeric value to contacts based on actions they take

Lead Scoring Variables

- Downloaded a price list or brochure
- Country – assign more points for top source countries
- When they plan to study?
- Demographic info (age, gender etc.)
- Engagement with website/email
- Different CRMs have different capabilities in this area

Sample Lead Scoring Matrix

Parameters	Value
Country of origin	Assign higher scores to student in your main target markets
Gender/Age	Assign higher scores to students that fit your target profile
Program of interest	Assign a higher score once this is known
Email interactions	Add to a student's score when emails are opened, read, clicked through etc.

Viewing Lead Scoring

DETAILS

4 History | 0 Notes | 16 Email History | 1 SMS History | 0 Phone Calls | 0 WhatsApp Messages

2 Meeting | 0 Skype Meeting | 0 Campus Tours

Filter...

Email read × | Point gained ×

Exclude events by source

Export

	Event Name	Event Type	Event Timestamp
	Custom Email: Generic Email	Email read	December 11, 2018 3:20 pm
	Custom Email: Thanks for getting in touch	Email read	December 10, 2018 5:07 pm
	Auto-Response	Email read	December 10, 2018 12:17 pm
	4: Open Auto Responder Email - Add 10 Points / 10	Point gained	December 10, 2018 12:17 pm

10 points

Student

Lead Status: Hot

Stage: Initial Email Read

Contacted

Contact owner

Address

Canada

Email

Phone - home

Phone - mobile

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Segmenting Your Leads Using Lead Scoring

NEW LEAD

Workflow A	Workflow B	Workflow C	Workflow D
Lives in your local market	From tier A source countries	From tier B source countries	From tier C source countries
Scheduled a level test	Completed info request	Completed info request	Downloaded brochure
Assign High Score	Assign Good Score	Assign OK Score	Assign Low Score

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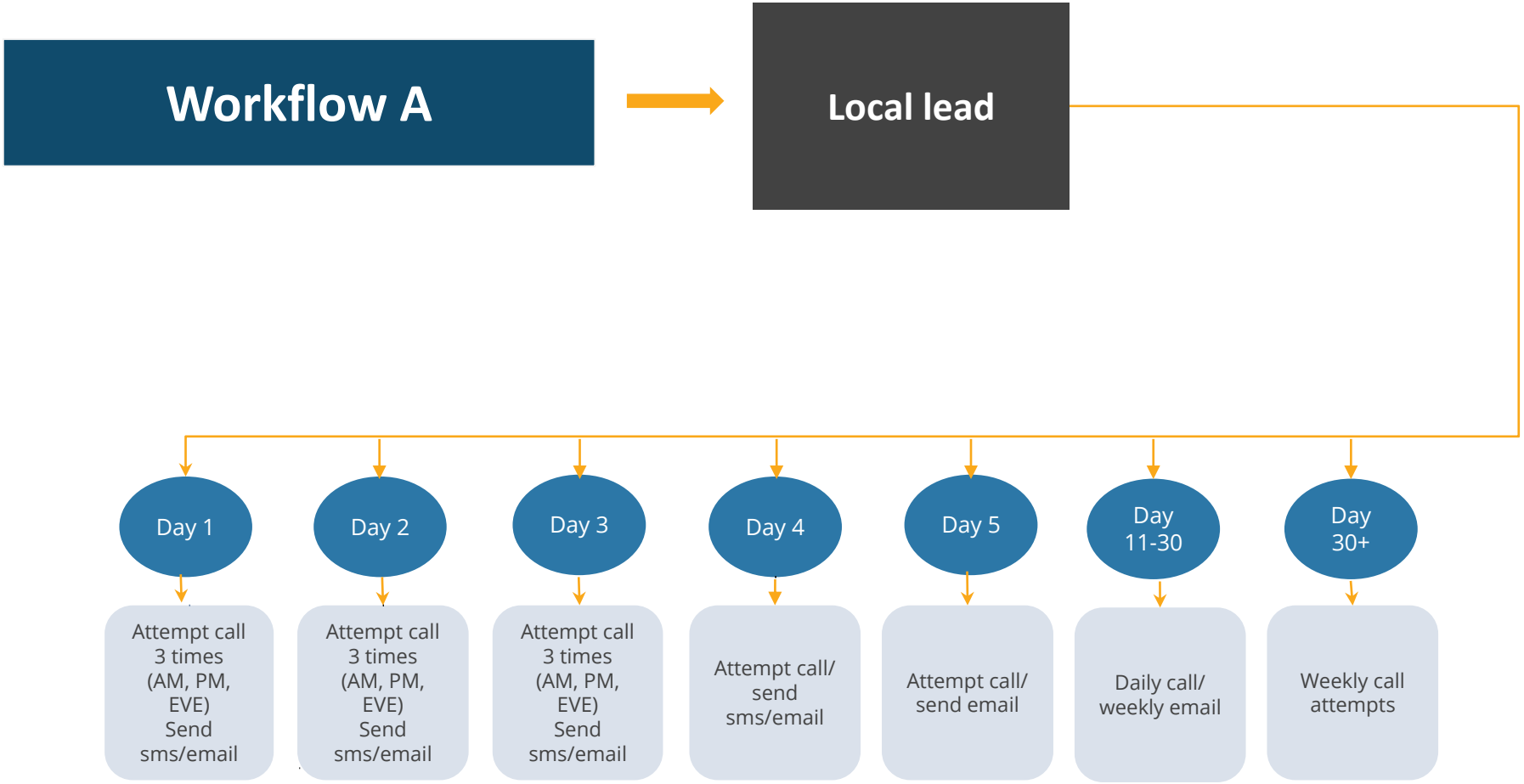
Sample Follow-Up Workflow



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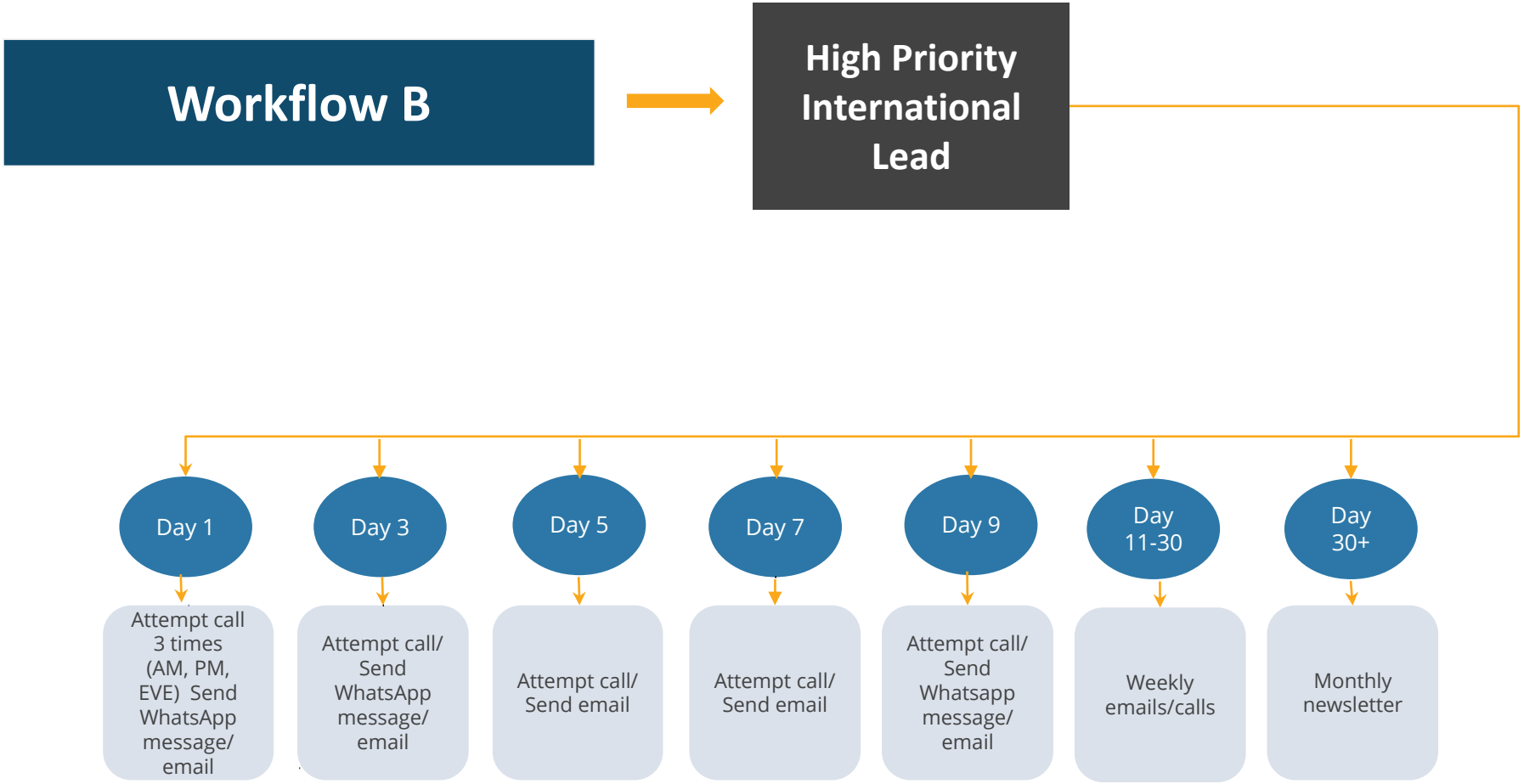
Sample Follow-Up Workflow



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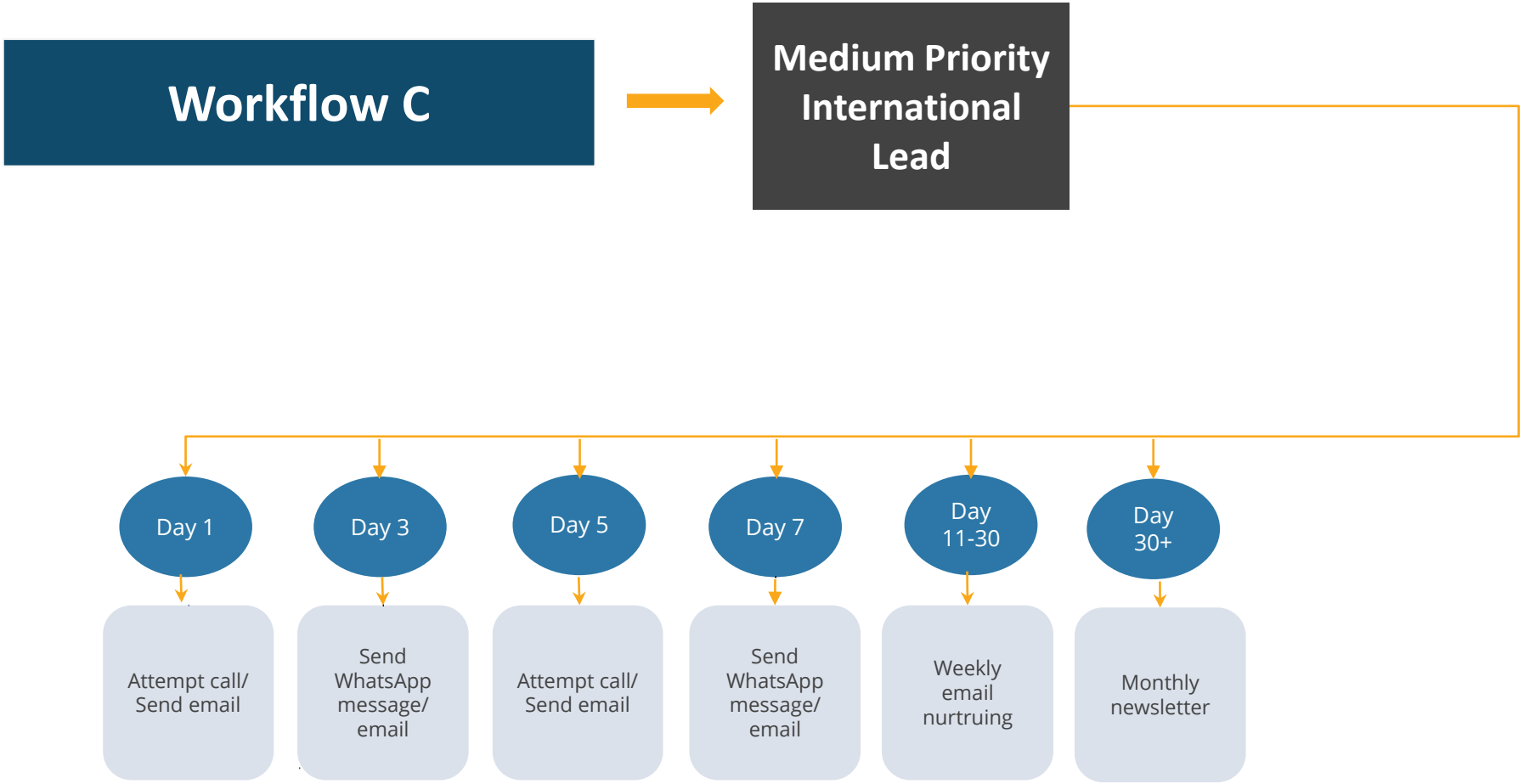

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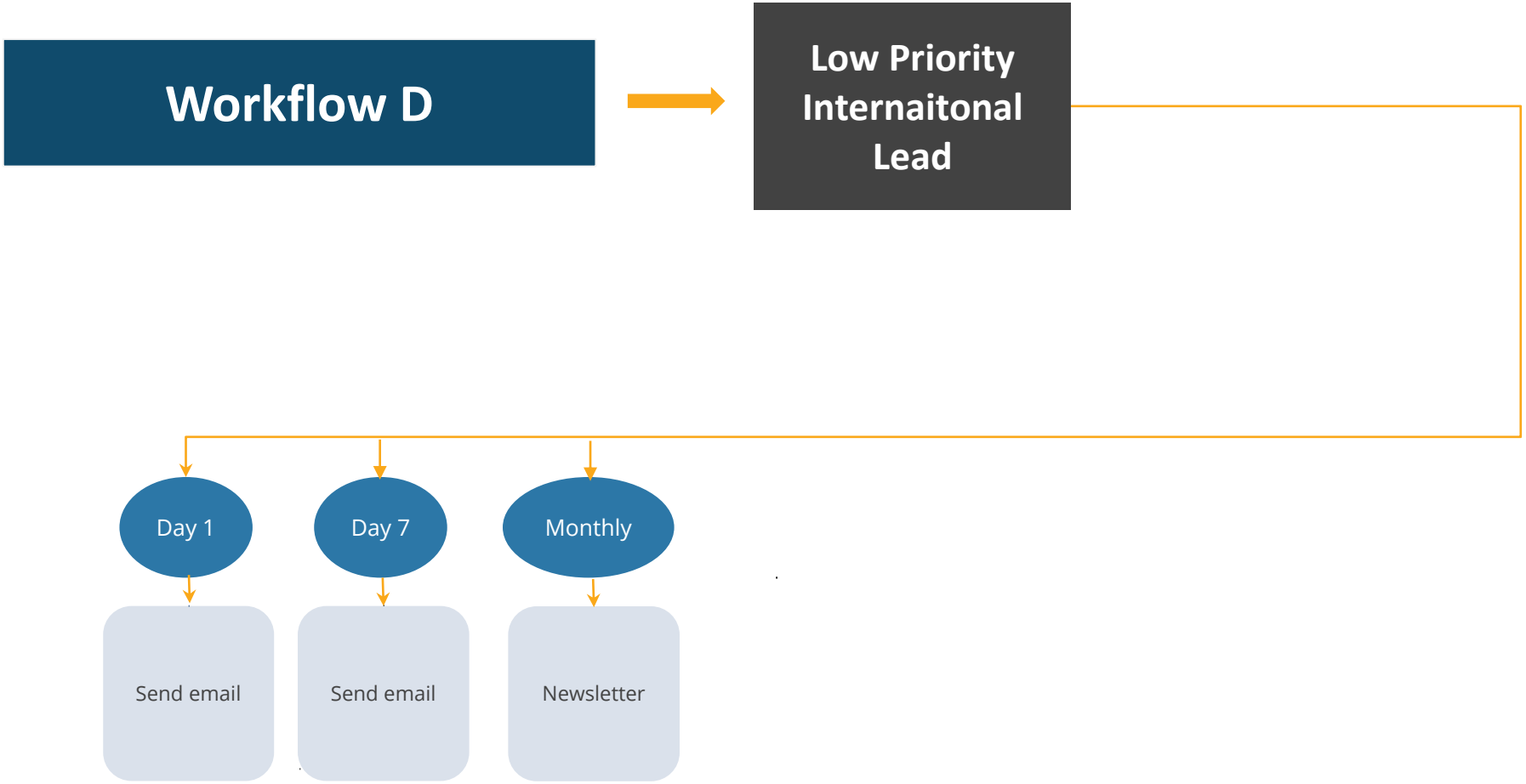
Sample Follow-up Workflow



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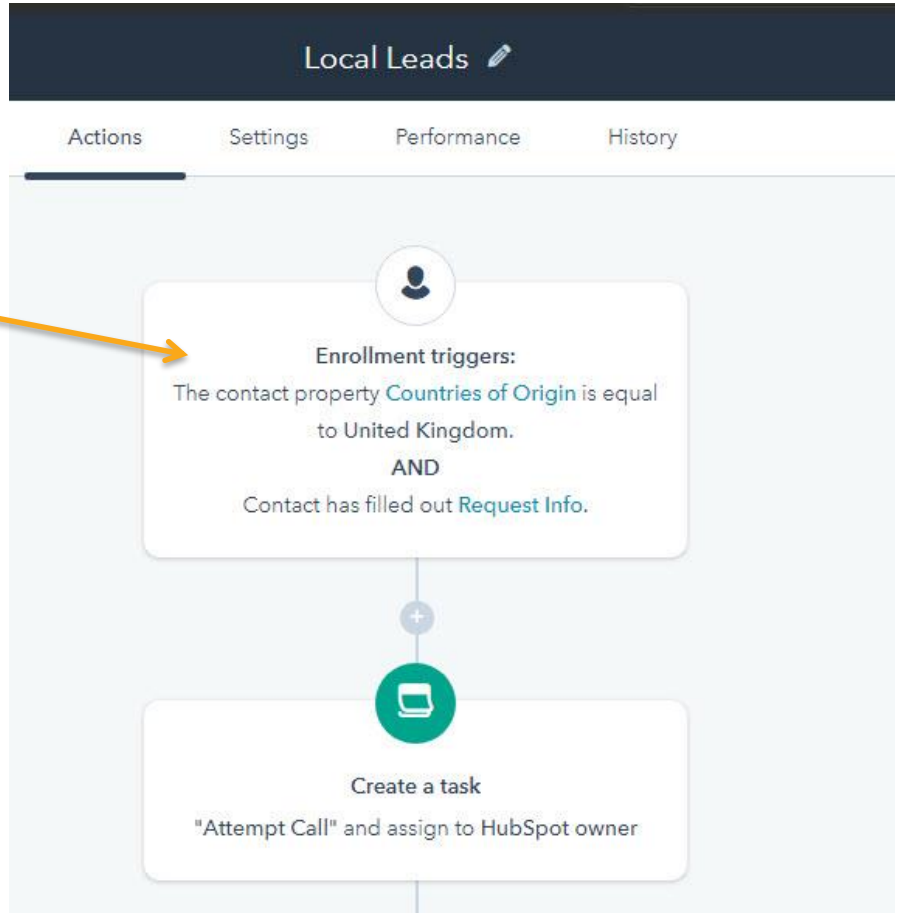
Workflow A Setup: Local Leads

Set triggers to enroll leads in a specific workflow



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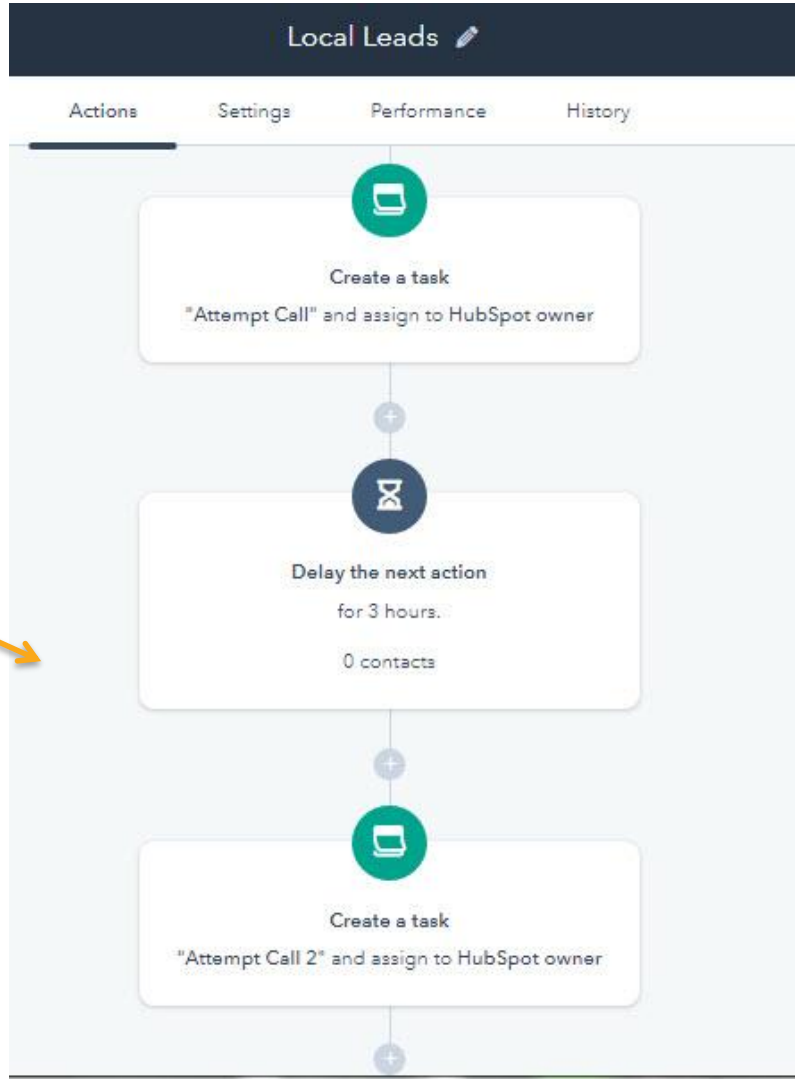
Workflow A Setup: Local Leads

Use system to map out your workflow activities



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Common Features of an Email Marketing System

A/B Testing

Workflow Automation

Subscriber Management

Integration

Template Design

Reporting

Email Software Options for Schools

Constant Contact

mailchimp

iContact

AWeber
we are email marketing

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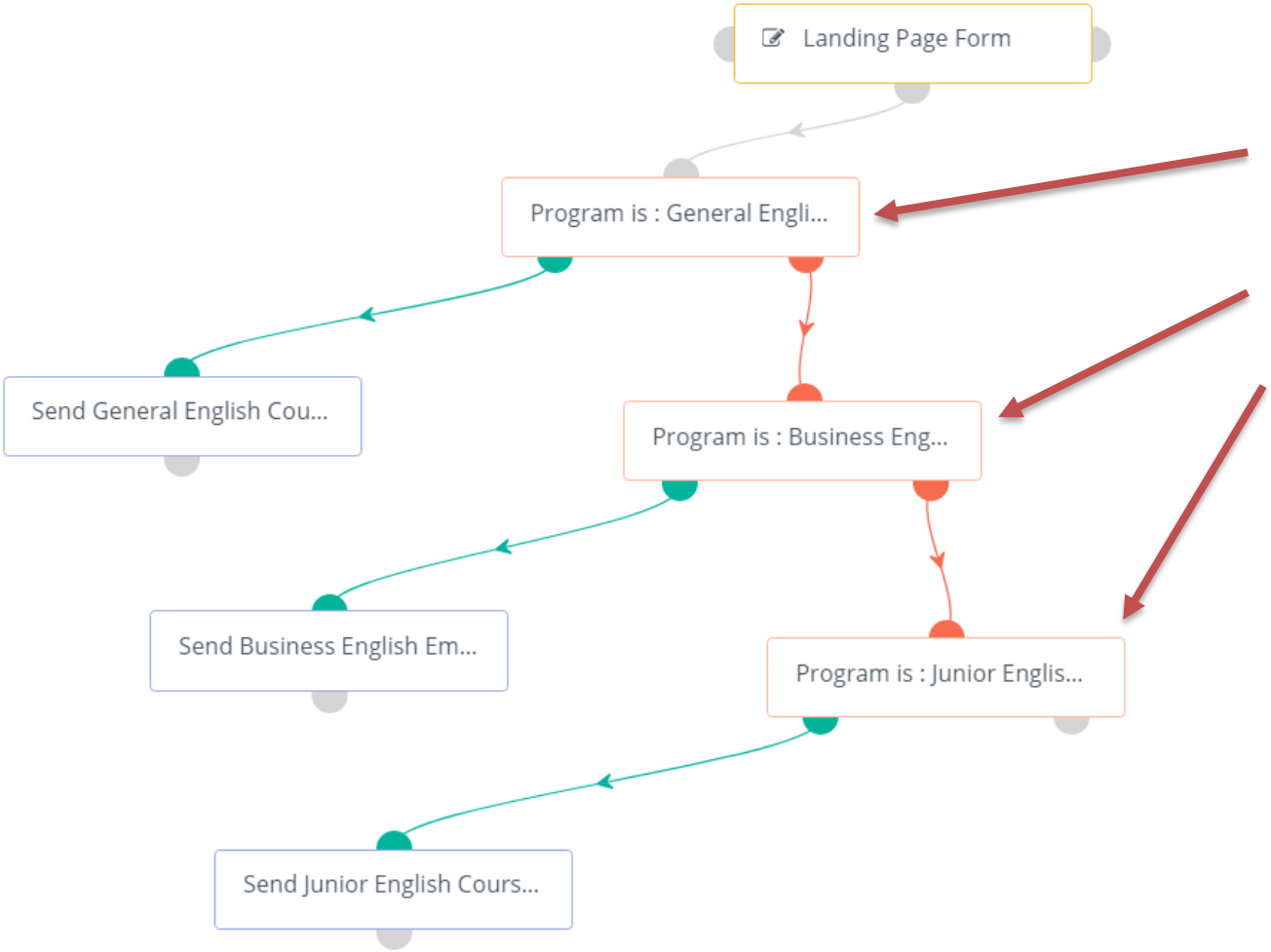
Create Autoresponders By Program



The program field determines which auto responder the new lead will get

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Create email templates for common queries

Visa info

Prices

- Email 9 - Working During Your Intensive English Program (English)
- Email 8 - Pre-Arrival (English)
- Email 7 - Application (English)
- Email 6 - Visa (English)
- Email 5 - Campus Life (English)
- Email 4 - Accommodation (English)
- Email 3 - Study in (English)
- Email 2 - Prices (English)
- Email 1

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How CRM Helps Schools Manage Inquiries

Lead Management

Reporting

Calendar Integration

By Phone

By SMS

By Email

WhatsApp (beta)

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CRM Options for Schools

mautic

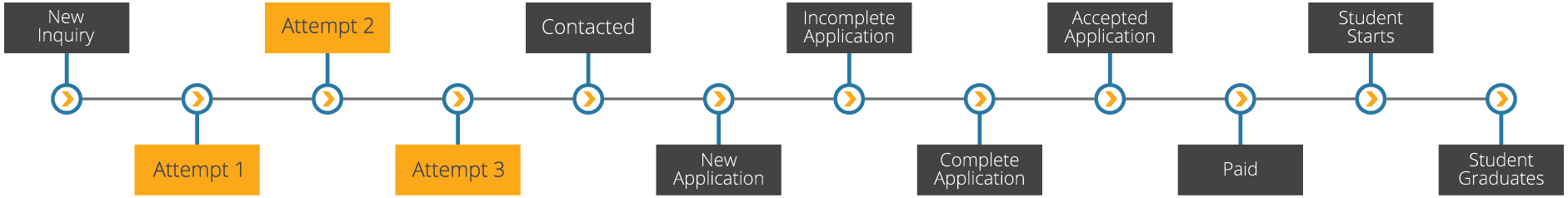
salesforce

ZOHO

pipedrive

HubSpot

Stages In The Admissions Process



These are the common stages which typical leads and applications go through

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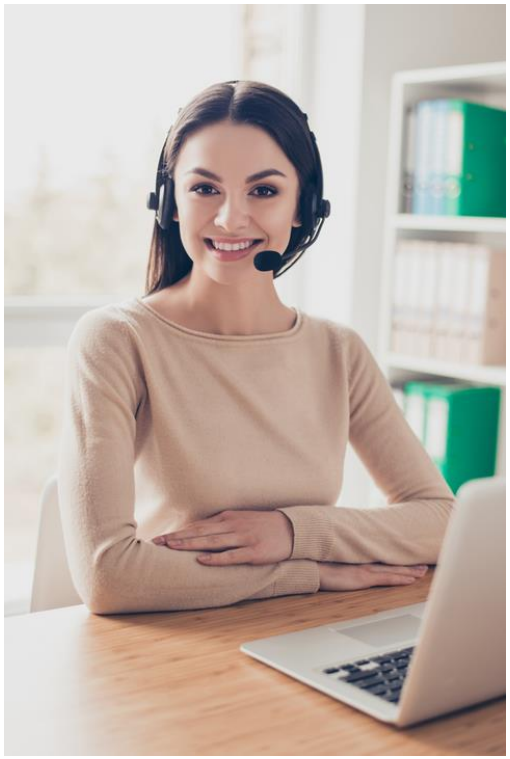
Have The Right Staff Doing The Follow Up

Mainly processing applications

Vs.



Taking care of a lead's every need!

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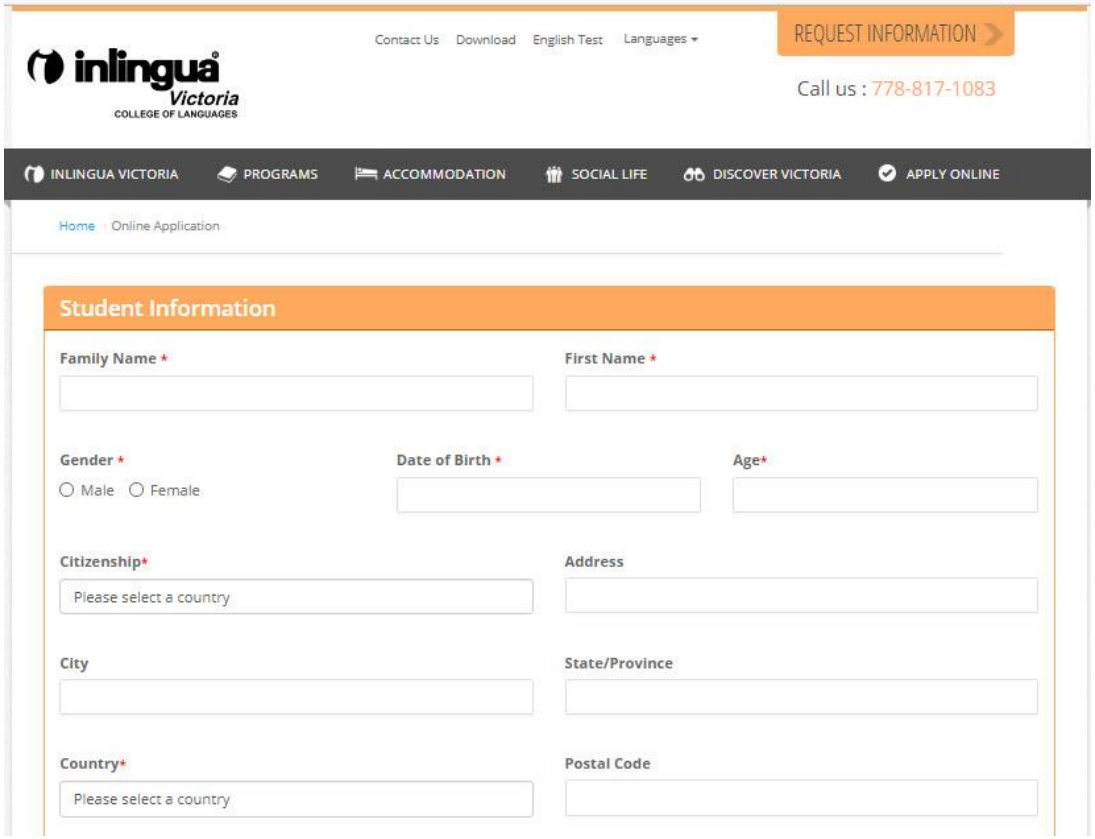
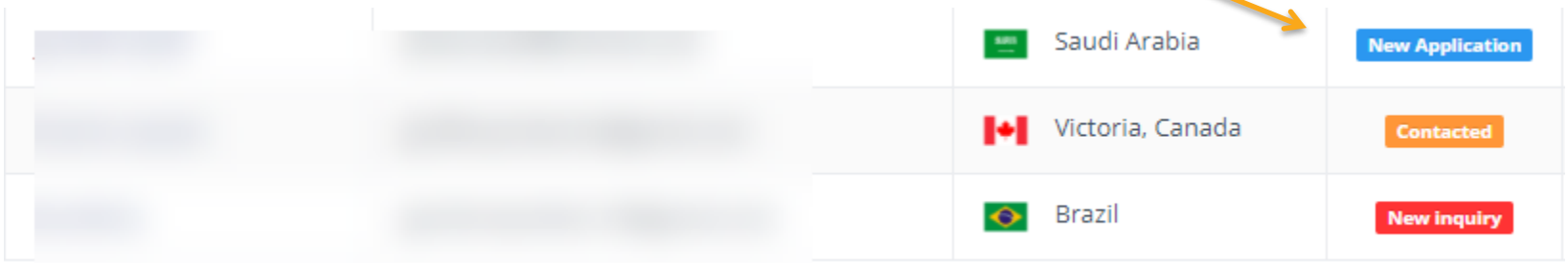
Separate Applications from Inquiries



Completed application forms can be automatically sent for processing



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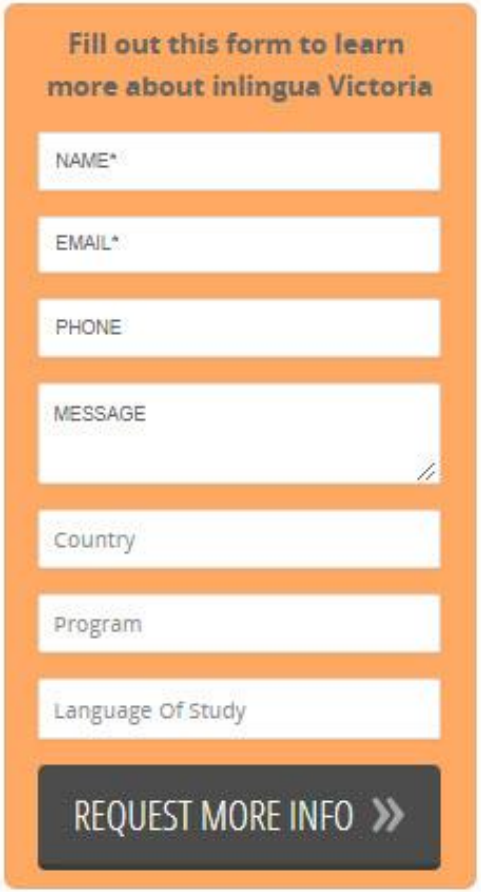
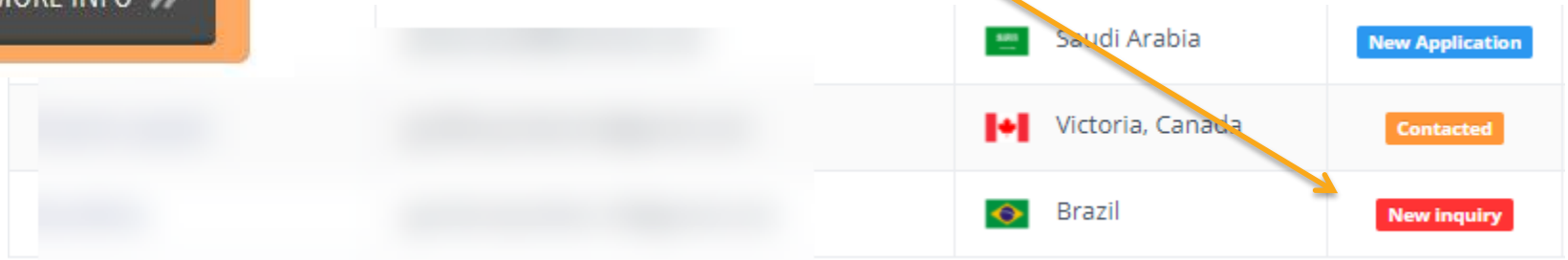


Inquiries may need to be handled by different staff than applications



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Viewing Contacts on CRM

Lokonde Geewan

Contact Information | Agent Information | Program | Educational Background | Arrival | Accommodation | Emergency Contact

Show Empty Fields

Contact Type	Lead
Lead Status	Hot
Channel	FB Paid
Name	Lokonde
Last Name	Geewan
Language	Korean
Page	http://iep.uga.edu/intensive-english-program-kr/
School	University of Georgia
Country	South Korea
Email	jgeewsn@gmail.com
Phone	+821074312097
Questions	Hello I wanted to know more about your program thank you

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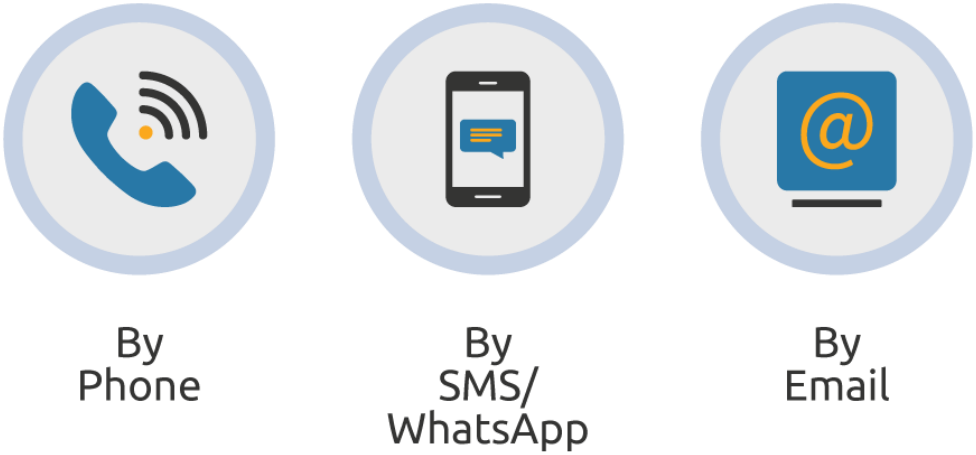
Follow-Up Approach

Making contact with new leads take time! Be persistent with your attempts and contact leads through multiple channels



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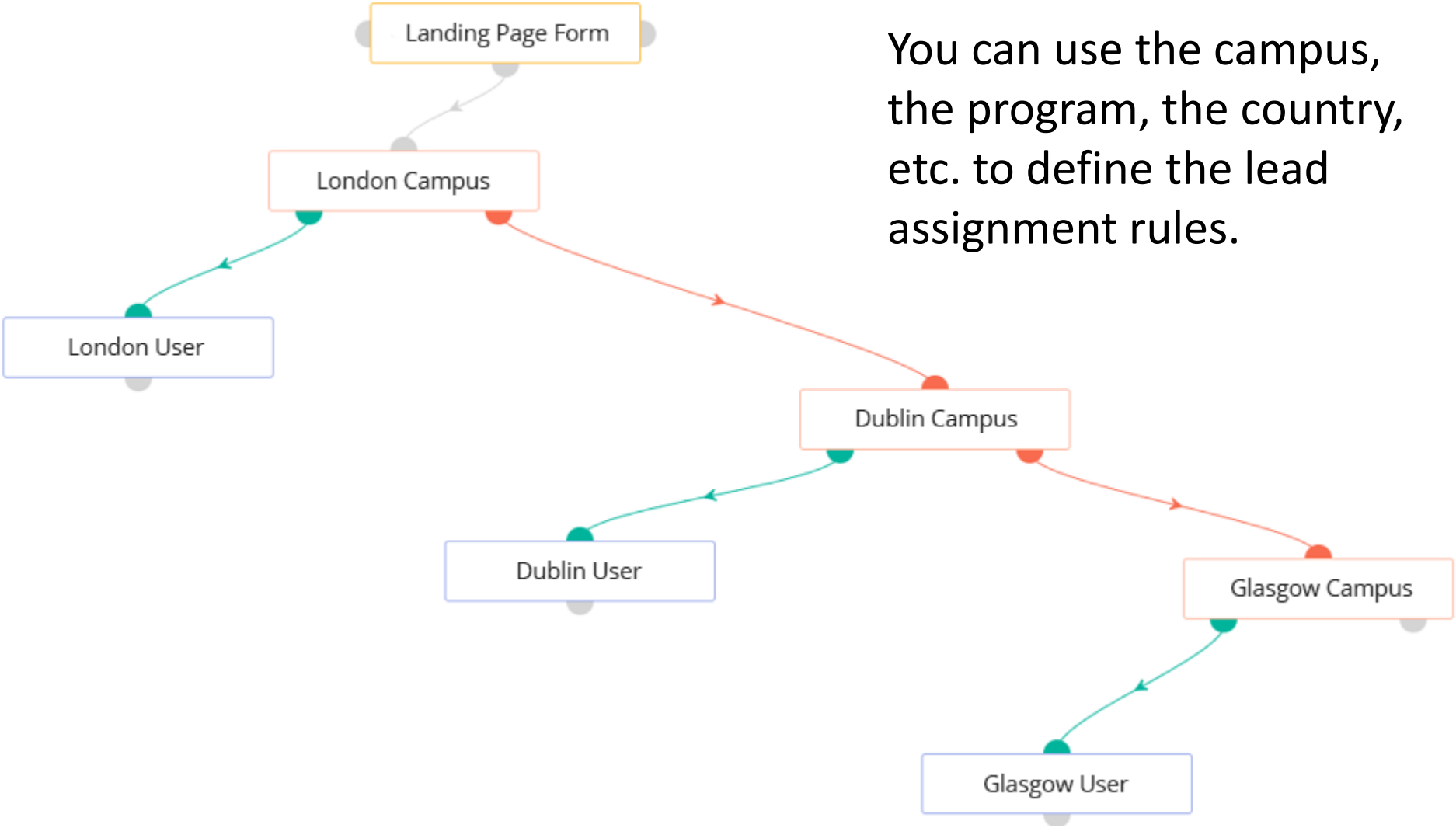
Use CRM to Rotate Leads Round Robin



You can use the campus, the program, the country, etc. to define the lead assignment rules.

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Record and View Each Lead's Contact History

33 History | 0 Notes | 4 Email History | 3 SMS History | 8 Phone Calls | 0 Meetings

Event Name	Event Type	Event Timestamp
Custom Email: Conceituada Certificação é concedida ao Programa de Inglês Intensivo da	Email sent	October 12, 2017 1:53 pm
Custom Email: Programa de Inglês Intensivo da recebe conceituada certificação	Email sent	October 12, 2017 1:52 pm
Custom Email: Como aplicar	Email read	August 1, 2017 10:32 am
22:Application Form Sent	Stage changed	August 1, 2017 8:53 am
Custom Email: Olá da !	Email read	July 5, 2017 10:10 am
21:Transferred	Stage changed	July 4, 2017 11:21 am
Custom Email: Como conseguir um visto de estudante -	Email read	June 29, 2017 8:43 pm
3:Contacted	Stage changed	June 28, 2017 11:00 am
Custom Email: Os Custos -	Email sent	June 28, 2017 10:57 am

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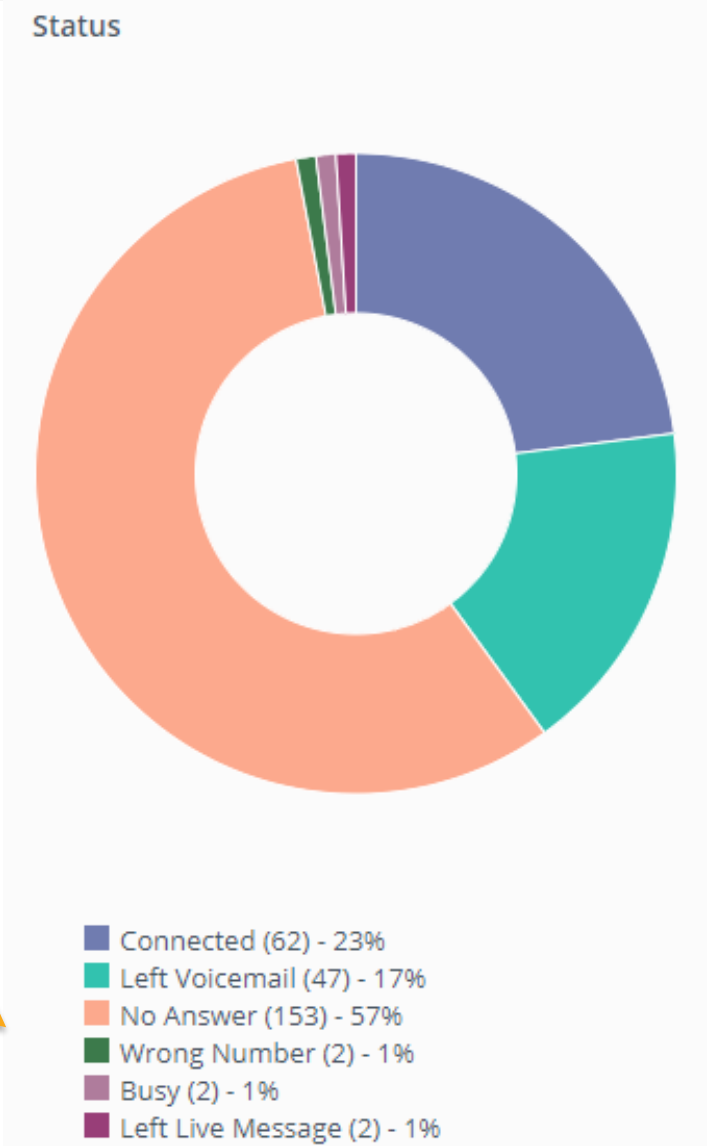
Call Outcome Report

Some CRM Systems give you the ability to monitor phone call volumes and their outcomes.



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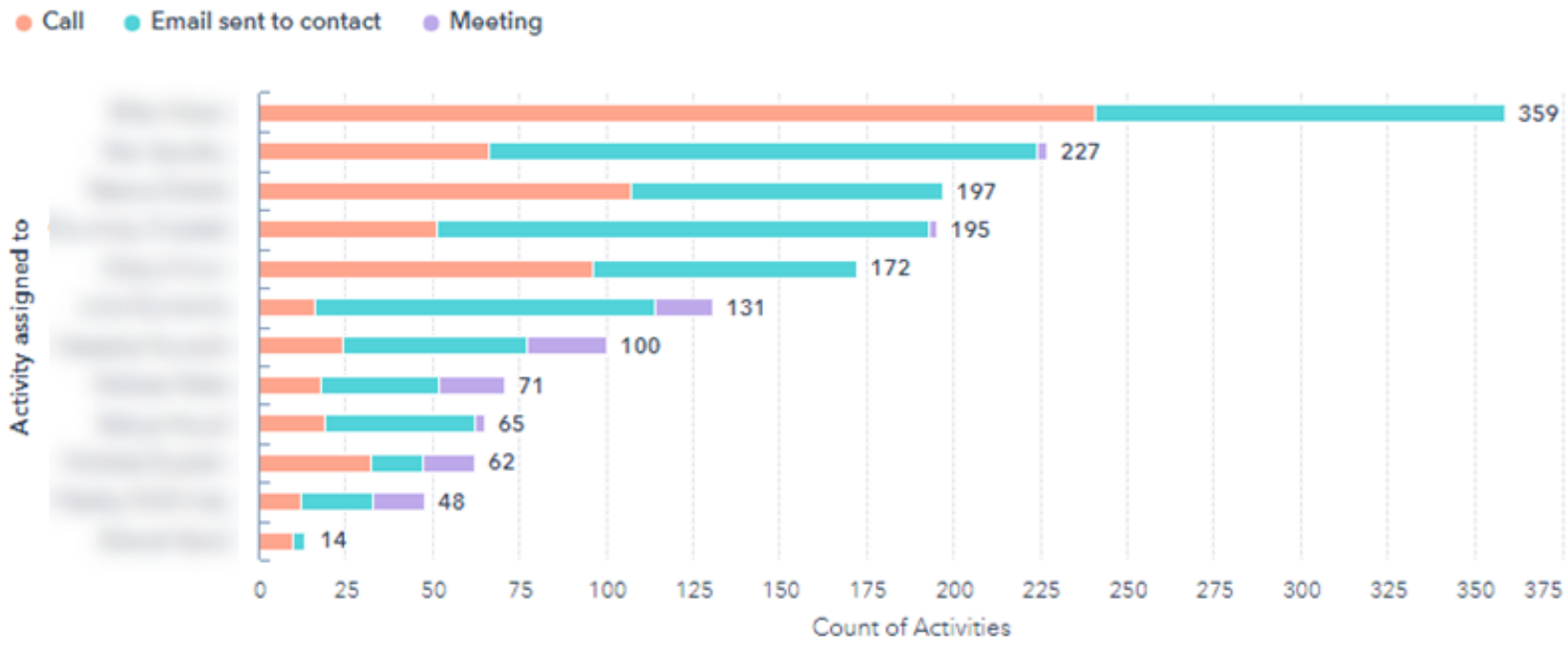
Admissions Activity Report

Activities

Date range: This month so far | Owners: 12 owners



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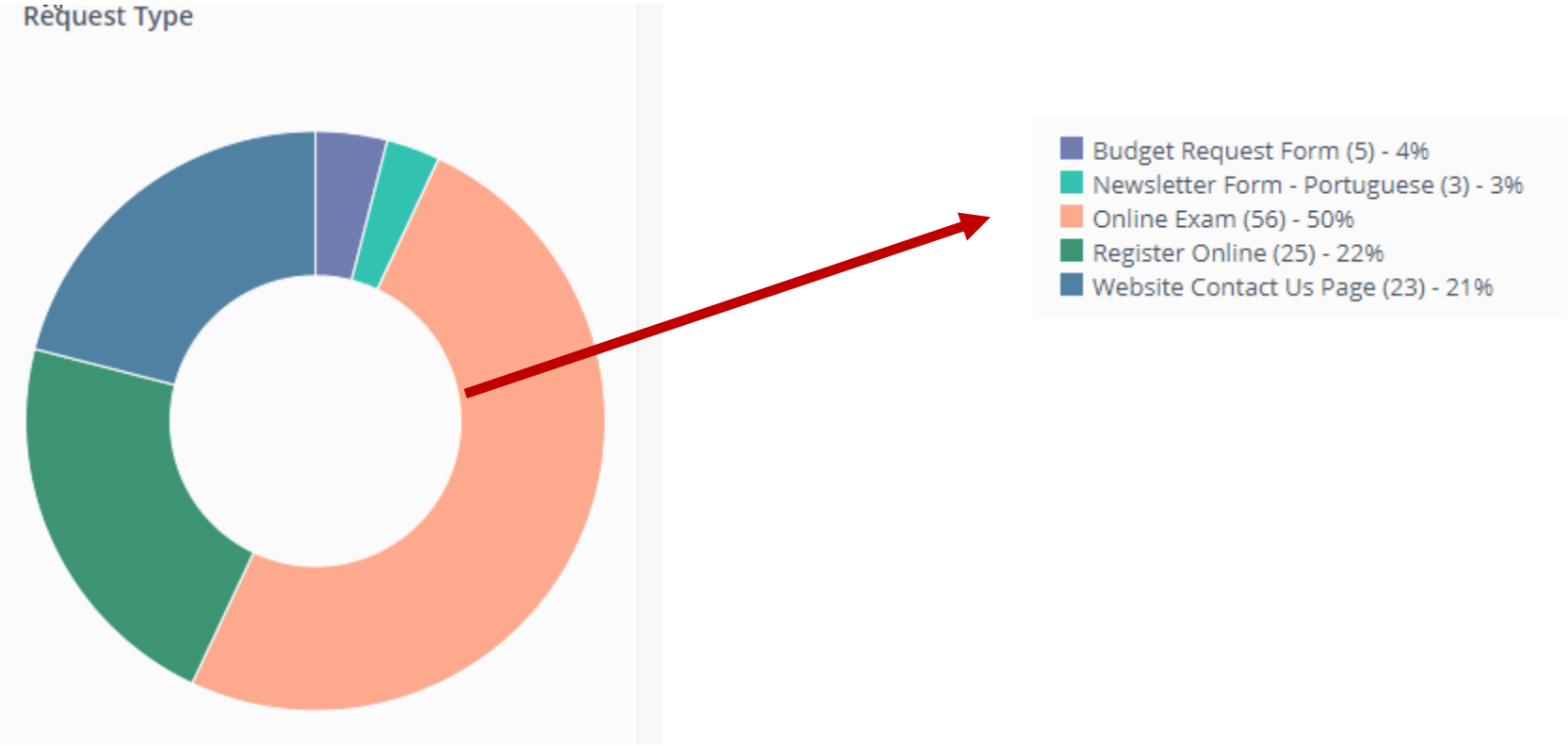
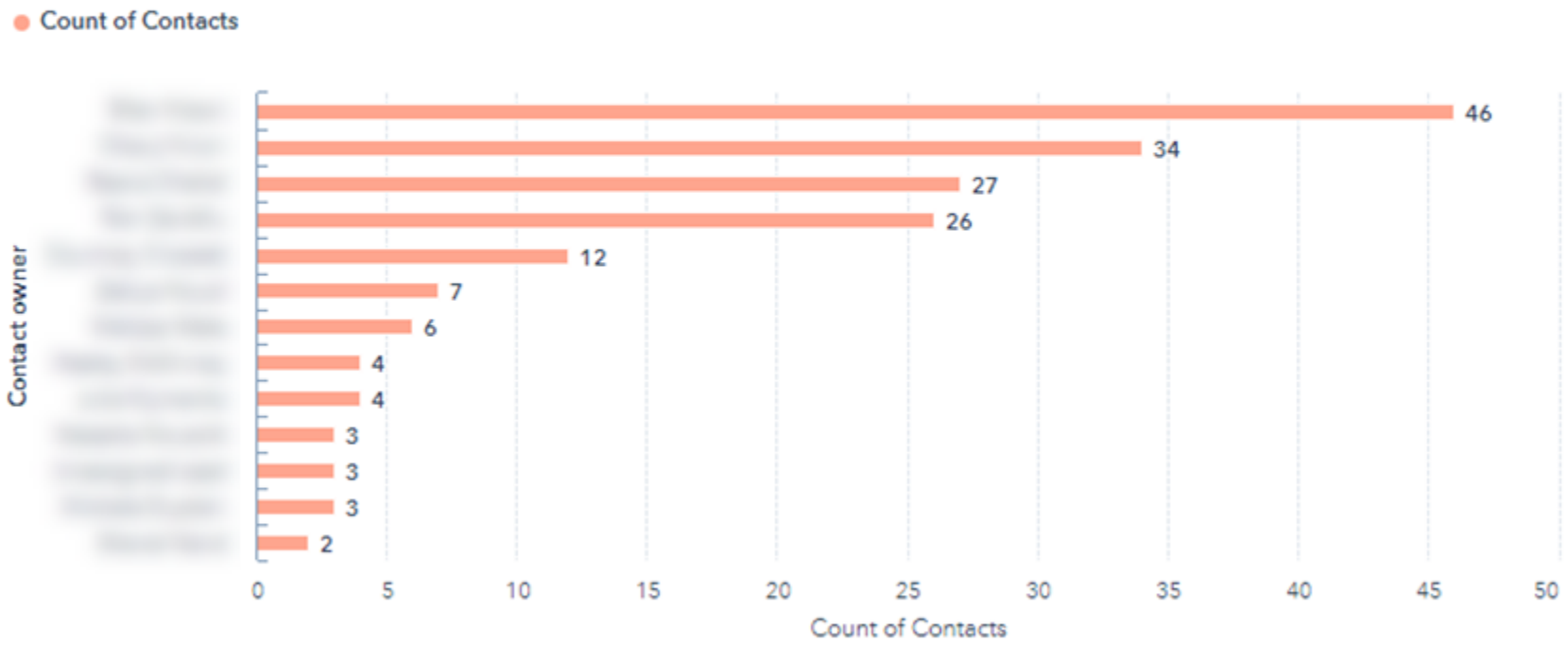
Leads by Request Type



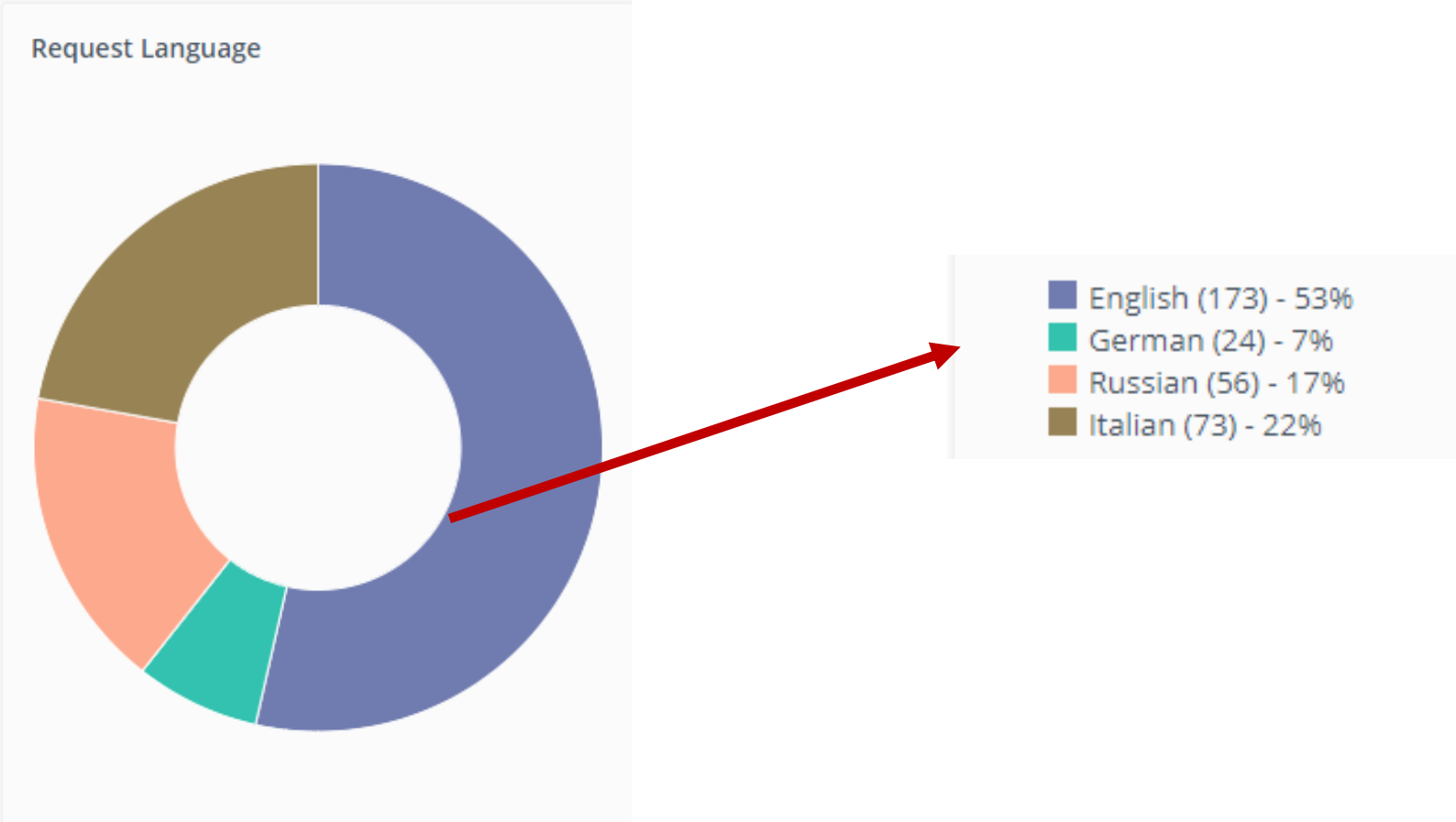
Leads by Owner

New Leads this Month

Date range: This month so far | Teams: 4 teams



Leads by Request Language



Leads by Channel

New Contacts By Source

Date range: This quarter so far

PROGRAM	ORGANIC SEARCH	PAID SEARCH	SOCIAL MEDIA	REFERRALS	DIRECT TRAFFIC	OFFLINE SOURCES	PAID SOCIAL	TOTAL
CTPP	4	28	-	-	20	20	68	140
CATD	26	3	1	-	79	13	-	122
MLA	10	33	-	-	11	18	35	107
SEA	8	29	1	1	22	32	10	103
PN	8	2	1	1	30	28	3	73
Total	56	95	3	2	162	111	116	545

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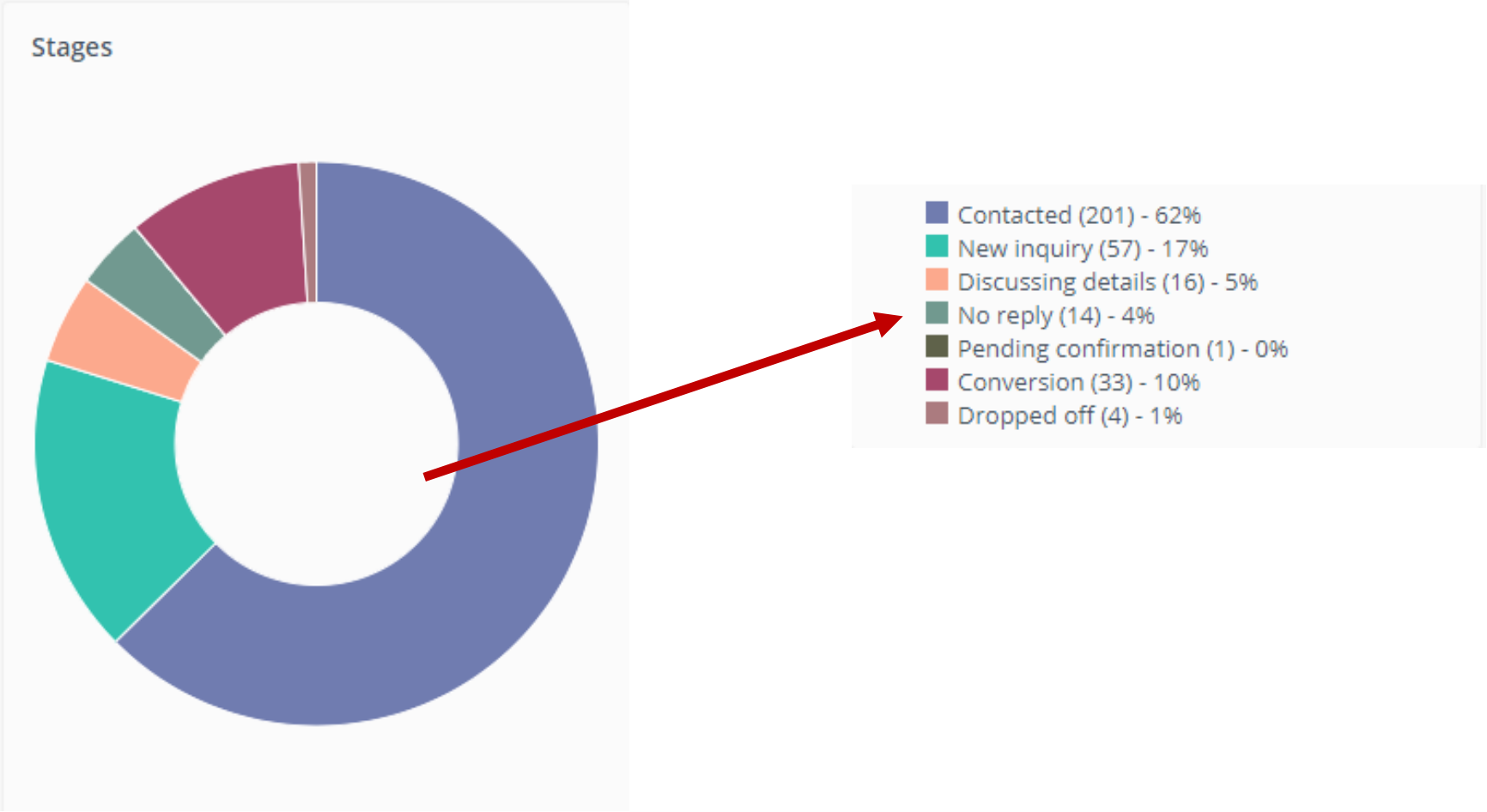
Leads Segmented by Admissions Stage



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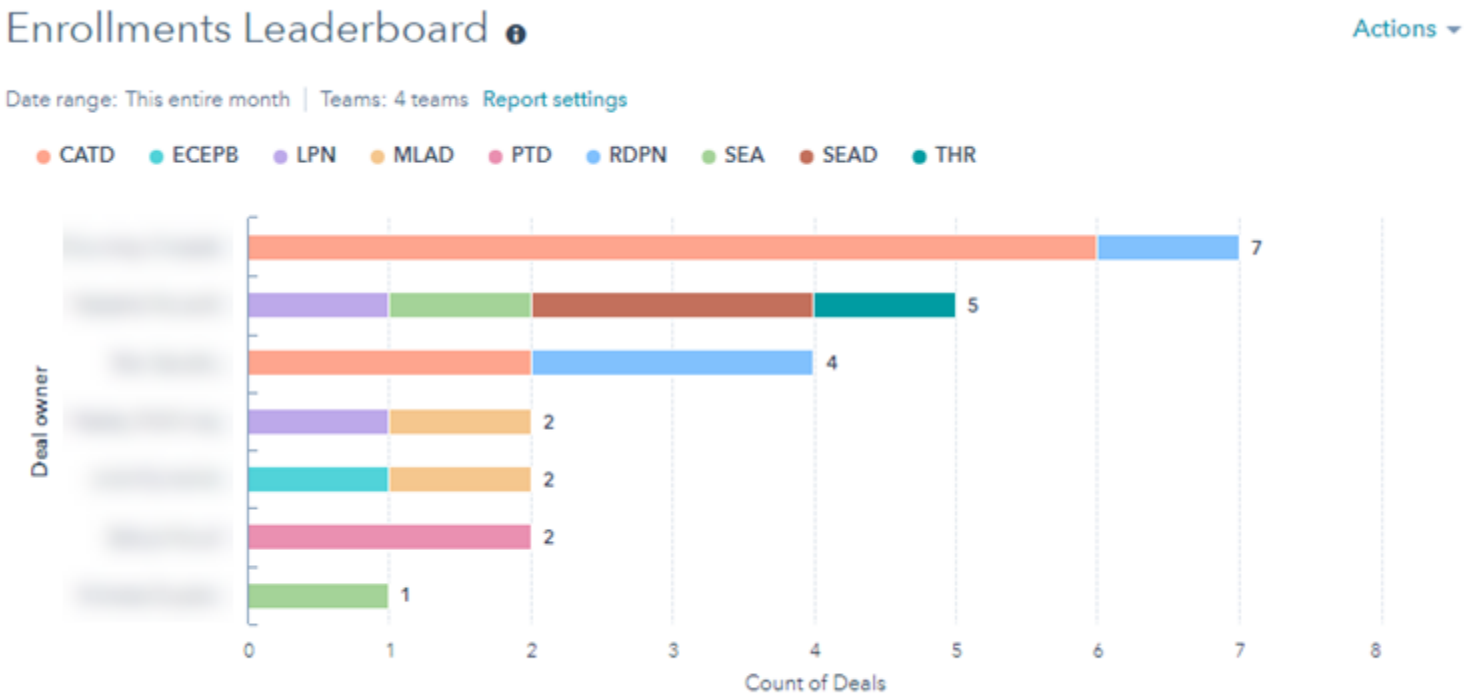
Enrollments by Contact Owner



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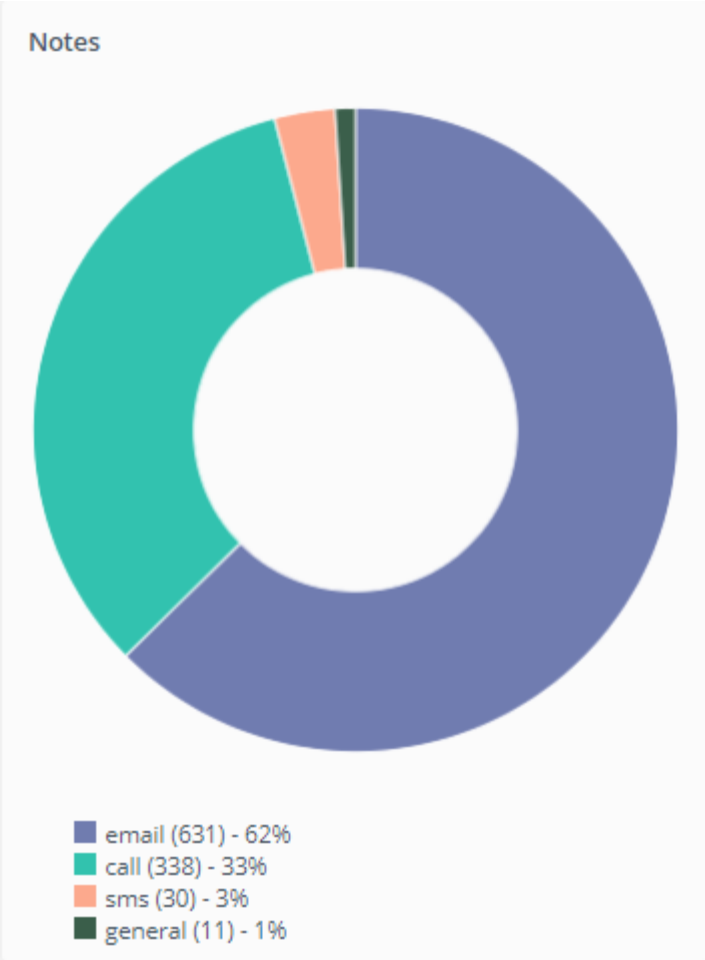
Converting an inquiry to a booking takes effort!



- Use your CRM to monitor the follow up activity
- We see a range of 12-20 activities per lead for them to book!

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Conclusion

- Is your online booking experience what students expect?
- Leverage all channels to support your recruitment efforts
- Use Marketing Automation to help your lead nurturing process
- Use CRM to manage the inquiry conversion process
- Measure your results and continuously improve

Have questions about this presentation?

I'm easy to reach at:

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