Career Education REVIEW
The Career College Information Source

Published by
Workforce Communications
www.careereducationreview.net

Collegiate Admission & Retention Solutions

Structured Call Center Traces Its Roots to the Career College Sector

with Ken and Ann Horne, Tami Jones and Marc Sizemore

Collegiate Admission & Retention Solutions, formed in 2006, focuses on providing admissions and retention solutions to the postsecondary education industry. It utilizes an off-the-shelf predictive dialer system coupled with proprietary scripting software to provide lead-qualification services to a number of postsecondary colleges.

CARS' primary function is to provide online and on-ground colleges having a large number of organic or purchased leads with qualification services.

Prospective students are downloaded into CARS' predictive dialer and once contact is made, generally within minutes of the student requesting information, a customized script is delivered allowing a CARS' telephone service representative (TSR) to deliver to a college's admissions team pre-qualified prospects who have indicated interest in the college's online programs of study.

Career Education Review editor Michael J. Cooney recently sat down with the CARS' executive team for a live demonstration and group interview. Here is that conversation, in edited form.

Take me to the opening screen.

Tami: The script delivery software interfaces with our predictive dialer. Once the leads come into our system and we have made an attempt to reach the prospects, we get a college admissions associate on the phone. Information will immediately populate the screen, including all information a prospect has already submitted on his/her form: name, address, telephone number, and the school that we're representing.

During normal business hours, we typically get back to the prospect within five or 10 minutes.

Some of our clients prefer us to say we are calling on behalf of the school; others want us to say we're calling from the school. No matter, the buttons across the top are consistent from script to script. They are customized based on information the school has provided. The school information button has basic contact information for the school, a local telephone number or toll-free number, physical address, and programs of study. The financial aid button is where they can find answers for questions regarding financial aid. We keep those as an easy reference for the telephone service representatives or TSRs because they're always going to get asked questions on those things.

So you have a fixed script, but you have an option built in that allows you to go with the conversational flow. Is that correct?

Tami: Absolutely.

So if I'm a TSR I might be representing ABC College on one call and somebody else on the next call?

Tami: Yes, but depending on our client's particular call volume, we have dedicated TSRs. Some of our clients have 10–15 dedicated representatives. However, other schools don't have the volume to justify a person sitting there doing nothing; these TSRs are cross-trained to handle other campuses.

The nice thing is that we can prove that we've called them since we catalog all the calls and record them. If there is ever a question, we can go back and retrieve that call.

The web map button across the top is more applicable to ground schools as opposed to online schools. This takes a prospect's physical address and matches it with the campus physical address. When the TSR clicks "web map" it pulls up MapQuest and has step by step directions; they don't even have to go in and key in the two addresses. We also work with schools to include landmarks in our directions, such as a McDonald's or a bank on the corner, across the street, that kind of thing.

The disposition button shows what happened with the call. Did we get a busy signal, was it a missed call, did we get a voice mail? If we got a voice mail, did we leave a message? Did we get a temporary or permanently disconnected number? All that information is then fed back to our client schools.

How quickly do you get back to a prospect once he or she fills out the form?

Tami: During normal business hours, we typically get back to the prospect within five or 10 minutes. If it's after hours, like the middle of the night, then we get back to them the next morning. But we do have instances where we call a prospect while he/she is still on the Web site.

Ken: That's probably the only complaint we get from the student—that we're shadowing them. They say: "I just hit submit and you're already calling me on the telephone. What is going on here?"

There are several admissions trainers in the country who talk about the two-minute drill because that is the only time you know where the prospect is. They're online or at the computer, so you should get to them as fast as you can. But does it give the prospect an eerie big brother feel?

CARS' Executive Team (l to r): Marc A. Sizemore, Director I.T. Systems; Tami S. Jones, Chief Operating Officer; Ann S. Horne, Executive Vice President; Kenneth C. Horne, President & Chief Executive Officer; and Diane S. Clower, Vice President of Special Projects.

Ken: That's the price you pay. This is a very competitive business; I think all experts in the business would state that the first school that gets to a prospect is probably going to recruit him/her.

The prospect is likely clicking on multiple sites and has filled out multiple forms. Does your system identify those prospects you've dealt with before for different clients?

Ken: We have some of it, but we don't get a great deal of that because most of our client base is geographically separated. Even though it's online, to some extent the school they will attend is still geographically determined. When they do hit our clients simultaneously, they'll hear a similar script, but not the same script. We are the school when we answer the phone. We are not CARS working for the school.

Tami: What happens if we speak to the prospect? Did they tell us: "I'm busy right now. I'm walking out the door. Could you call me back?" If so, the TSR can go in and key in the time to call the prospect back and the dialer knows when we need to try again to reach that prospect.

Sometimes the prospect tells us that they're already attending another college. Some of our clients want us to go a little further and ask things like where they're attending college. If they're not interested at this time, then the dialer knows to call them back in 90 days. So the TSR can go in and tell the system what happened with that call—did we speak to a third party, leave a message, set up a callback time or did they tell us the prospect doesn't live there anymore. But obviously, if they tell us to stop calling, we quit calling.

How do the Do Not Call laws fit into this? If a prospect submitted an application, you can call them for 90 days, correct?

Tami: Correct.

Ken: This is an immediate thing because they requested information.

But can you continue this process over 90 days?

Tami: We can continue calling unless they tell us to quit. If they tell us to quit, then we have to quit.

Do you get another 90 days after every contact with them? What if they say, "Let me think about that," and ask you to call back in a week?

Tami: If they tell us to keep calling, we can keep calling. That would extend the 90-day period.

Marc: If you're talking to the prospect and they're still interested, you can get another 90-day window. You can take it out further—six months—if you say they've got existing business. However, we play on the safe side of those laws because they're ugly if you cross the line. We stick with the scripted window.

Tami: If you have a business relationship with them, you can continue calling for 18 months.

Ken: The nice thing is that we can prove that we've called them since we catalog all the calls and record them. If there is ever a question, we can go back and retrieve that call.

Is this proprietary software that you had developed for yourself?

Marc: Yes, it is.

So this isn't off-the-shelf software that you adapted from someone else?

Ken: The dialer is off the shelf, but the software that does the scripting is not.

Tami: What is displayed on the screen is all written in-house. It tells the TSR what to do next with that lead and it also feeds the output back to the client, either real time or at the end of the day.

We deliver the customized script based on what the client requested. For example:

"Hello, this is Marc calling on behalf of ABC College Online. Is Eli there?"

If yes, "Hi Eli, how are you doing today?" Then the TSR responds appropriately and builds the relationship.

"The reason for my call is that you just inquired about taking online classes with us. What I would like to do is ask a few quick questions, and then have you speak with an admissions associate who can give you more information about ABC College and what we have to offer you." If they say yes, the TSR clicks "yes."

"How did you hear about ABC College Online?" They have a drop down box so they can capture the source.

"May I verify your name, phone number and e-mail address?" Again, this information comes in based on what the prospect has submitted.

We'll ask a few other questions such as, "What's the best time to call?" and, again, there is a drop down box that is very user friendly for the TSR. If we get an alternate phone number they'll key it in there and add the address and the e-mail address.

Some of our clients want to know student gender so that they can use it for their marketing research. Again, we offer the drop down box for that and it's in the green because we don't want them to actually ask the prospect that.

So their gender is inferred from their voice and name?

Tami: Right.

Next, the TSR will ask, "What year did you graduate from high school or receive your GED?" and they'll key in the high school graduation year. In the comment box they will type in any comments that they feel need to be passed along to the admissions associate. Then they'll click "continue."

"Eli, from what we've discussed, you make a great candidate for enrollment with ABC College Online. If you hold for one minute I will let you speak with one of our admissions associates who can further assist you."

They click "transfer" and it automatically goes over to the school. Someone at the school answers, and while the prospect listens to music, the TSR will say: "This is Marc with CARS and I have an outbound call on the line. The lead's name is Eli Meadows, Jr. and his or her phone number is so-and-so." They give them that information, which again is completely customized to each client.

So the school sees the same information that your TSR does?

Ken: Yes, the lead is simultaneously downloaded to us and to the school. So the school has the same information that we do.

But you've now added more information to it. Does the school get that? In real time?

Marc: The school will get the new information, but they will get an e-mail on the comments. However, if the agent thinks it is something they need to immediately know, then the agent will tell them verbally in real-time and follow up with an e-mail.

Tami: After the TSR selects the rep, they transfer the call—the TSR

The CARS System At A Glance

1. A prospective student submits a request for information.
2. The prospect's information is immediately downloaded to CARS.
3. The CARS' telephone service representative (TSR) attempts contact within five to 10 minutes to pre-qualify level of interest.
4. Lacking contact, CARS' system strategically locates follow-up attempts throughout the morning, afternoon and evening.
5. After contact is made, CARS' TSR delivers customized presentations to prospect.
6. CARS conducts a brief qualification interview and transfers the prospect to the college's admissions associate.
7. After the TSR has qualified the lead, a warm transfer to the admissions associate is made; the admissions associate will then conduct a comprehensive qualification interview, direct the prospect to the necessary links, and instruct the prospect to the necessary prerequisite assessment.
8. Once the prospect has applied, the prospect is transferred to the financial aid department for completion of online financial aid packaging.
9. CARS then proposes the college utilize CARS' sister service, Global Financial Aid Services' online financial aid packaging.
10. During the enrollment and packaging process, a student services individual also assists the prospective student with start date reminders, classes and schedules, and more.

clicks "finish" and the call is transferred. Immediately, an e-mail with all the prospect's information goes over to the school's director of admissions, the associate director of admissions or whomever the school selected. The e-mail has all of the prospect's demographics, program of study, and added comments. Additionally, it captures the rep's name we transfer to allowing the college to track the call and hold their people accountable.

The other aspect of scripting is to work closely enough with the college and their admissions associates to ensure they are not repeating the same questions we've poised to the prospect.

There is an assumption on your end that a rep is available on the other end. Do you know that before you get to that part of script? What happens if no one is available?

Tami: No, we do not know if someone is available. We make assumptions based on their hours of operation and the college's number of admissions associates. But we attempt to transfer, let it ring 10 times, then pull the call back. We click "abort transfer" and retry the transfer again, letting it ring another 10 times.

But now you have a prospect hanging on the phone for a long time. Don't you?

Tami: You're right. But it's ringing very fast so it's not taking a long time.

Ken: That's the reason why we work closely with the school's admissions team and managers. They don't want to find out from us that they are having trouble getting the lead transferred. If there is a chronic problem with the client, we'll just tell them that we'll set an appointment. The system will not work if you're not answering the phone properly. When schools are paying the amount of money that they're paying us to get these leads, they're going to see to it that their team answers the phones.

We have one client we transfer 200 to 300 leads a day, and of those, we're not able to transfer about one or two in an eight-hour shift. They work the system and they work with us. We like to say that we take care of the little things and that's one of the little things. There are many little things becoming big things that make it all happen.

Tami: If for some reason we can't get them to answer, we pull the lead back and say, "I'm sorry, but all of our admissions associates are assisting other students. Can I have someone give you a call back?"

Then we send an immediate notification over to the school that says someone needs to call this prospect. We've done what we can with it. The prospect has said yes, they're interested, and now the school needs to take it from there.

Marc: That's another way clients can tell if something is going on. If they start seeing four or five e-mails from us a day saying we couldn't transfer prospects, then we start getting phone calls asking what the problem is.

Tami: There is also a script if the prospect tells us they're not interested or that they've changed their mind. After we capture this information, the TSR clicks "finish" and information about what happened to the lead and why he/she is not interested is transmitted back to the school.

So they can go back to the affiliate in terms of who generated this lead and, if we have a pattern, say this isn't working.

Tami: Right.

Ken: We inform the client that the leads that they're buying are bad and tell them why they're bad, so they're able to get refunds or make good on those leads.

That sounds like a conversation we should do following this; let's get back to the script.

Tami: Once the TSR has completed the call, the dialer knows that they're available to take another call and it'll route the next lead to them. Again, it may be for the same school or campaign or it might be for a totally different client. Most TSRs can handle the inbound and the outbound calls, which encompass the Internet leads as well as the regeneration leads, or old leads they haven't done anything with. Let's look at the regeneration script for Birmingham.

Again, the scripts are completely customized.

"Hello, this is Marc calling on behalf of ABC College Online. Is Susie there?" If yes: "Hi, Susie. How are you today? A while back you inquired about taking some career training classes and you have not yet enrolled, so I'm calling today to see what you have done so far about furthering your career training."

If they say, "Nothing," the TSR says, "I would be happy to help you with that. Are you currently employed?" This just gives them some conversation pieces.

If yes, "What kind of work do you do?" Then they can go into the transition.

But you're not capturing that.

Tami: No, that's just conversation.

Ken: But it can be captured if the client wants it to be.

Tami: We can add any buttons, drop boxes, anything to the scripts because Marc writes all of them.

Do you charge by the question?

Tami: No. What we do when we're trying to start a new script with a client is send out a questionnaire about their school, their programs, etc. Then, depending on the kind of campaign they want to do—if it's a regeneration, new Internet leads, inbound or whatever the case—we develop a script based on our previous experiences of how we think it should flow. We also ask them to provide us with their current script. We write the draft, then send it back to them for tweaking, and together create the script.

So it's not like an answering service that charges by the number of questions they ask or anything like that?

Ken: No, but we do charge an hourly fee for additional scripting.

Marc: To do the programming, the setup, and all, yes. But it's a prospect fee on the leads.

Tami: The other aspect of scripting is to work closely enough with the college and their admissions associates to ensure they are not repeating the same questions we've poised to the prospect. It helps to have them write a script on how to pick up where we dropped off. There is no point in them going back and asking that poor prospect his/her name, phone number, address and so on. When we've made that transfer we've said, "I've got Susie on the line, she's interested in this and here she comes." We have found that if a transfer takes more than 30–35 seconds the prospect hangs up.

Again, this is just qualifying the leads to qualify the prospect's interest. We'll ask about a program of study and what year they graduated from high school or received their GED. On most of our scripts, if a person has not already graduated from high school or received their GED and our client is not interested in talking to those leads, then it takes us to a script that says having a GED or high school diploma is one of the admissions requirements. We tell them to call us back after they complete high school or their GED. Our role is to keep it simple, verify the information they submitted, and get them to an admissions associate who can answer their specific questions.

I spent 10 minutes on the site, but I had to deny at least seven school requests for information. Clearly they had an affiliate site that was generating leads. Even though I said I didn't want it, within an hour I got e-mails from all seven I said no to.

Tami: After a prospect submits information, he/she gets an e-mail saying we received the request for more information and someone will be in touch shortly. We like to send that out from us because that way we know exactly what it says. We also send out e-mails after we've tried to make five attempts on the telephone to reach a prospect. If we can't get them or if we keep getting answering machines or a third party, then we'll send an e-mail that says we're trying to call you and please call us. A lot of times they'll respond back via e-mail or sometimes they will pick up a phone and call us; then we can verify information.

Do you have an e-mail department?

CARS call center.

Tami: No, right now we do not. We forward that information to the school and let them handle it.

Ken: But that is something we're working on; it's the next evolution.

Basically, you're telling me the leads that originate from some sincere request for education are much better than those you get from people who sign up for information just to get gift cards and the like, correct?

Ken: We report those back to the school as bad leads. In many cases, schools pay for our service with the savings that we provide on good leads. But some schools do it and are satisfied with the two percent conversion.

But the real bad leads, in my opinion, are those where the phone number doesn't match the person or they don't live there. People type in bad information because they don't want the response.

Tami: If we get an answering machine, then we click "answering machine" and a script will pop up for them to deliver whatever message they want left. In this particular campaign, they want us to leave a different message depending on where they are in the rotation. If it's the first week we've tried to reach them then we leave one message; the second week we leave a different message.

We can also schedule an appointment for them to go in and visit the school. The grayed-out areas are times when the school is not available to take appointments. But any of the other times the TSRs know they can select from.

So once an appointment is scheduled, does it turn gray to signify that the school is no longer available?

Tami: No, not necessarily. We work with our client schools to treat these appointments as walk-ins; that way whoever is the first available admissions associate when the prospect gets there gets that appointment. We'll select a time and then click "continue" where the prompt tells them: "I've really enjoyed our call today and we look forward to talking with you again on Friday at 2:30. If you'll get a pen and paper, I'd like to give you directions to the school." They can use those directions or they can click on their web map where it would take the prospect's address and the school address and get the MapQuest directions.

Couldn't you just e-mail that to the prospect?

Tami: We do that also. Once we hang up the phone, they receive an e-mail notification that says we have your appointment confirmed for this date and time and here are the directions. An e-mail notification also goes to the school saying this prospect is coming on Friday at 2:30 and here's their information.

I'm interested in the interface between your system and the lead generators—the aggregators and the affiliates.

Marc: We work now with the clients. The clients get the leads from the affiliates and then the clients send us the data on the Internet leads that do real time through a Web service. We work with the client and try to take whatever format they can send, so each client is different and we customize it to each individual client.

We tell them they need a song in their voice and a smile on their face every time they pick up the phone and receive calls.

We report to the client and then, like in ABC College's case, they prepare a report that tells us what's happened to each of the leads by an affiliate.

So the leads are collected as the client sends it down the pipe to you and then you do the qualifications on them, correct?

Marc: Correct. But it happens so fast because everyone has it automated. The moment it hits them, it's hitting our system.

Does every lead include data that tags it to its origin?

Marc: Not necessarily. It does at the school level, but it doesn't mean we necessarily have that information.

Tami: We also see leads come in from client A and then five minutes later come in for client B.

How do you handle that?

Tami: We report it back to both schools. One particular example would be where we make five attempts to reach the prospect on the phone and then we send e-mails and the e-mails go out looking like they're coming from client A or client B. If the prospect responds to both of them you wonder what's going on. It's just that we received the lead from both schools.

There have been complaints that some will resell leads to everybody they can sell them to.

Tami: Yes, but in some cases that lead may have requested information from both schools.

So you don't know whether the prospect generated the multiples or the affiliate is just trying to maximize revenue, correct?

Tami: Right.

Ken: I don't think it can be as widespread as a lot of people are making it out to be. Otherwise we would see it much more.

How do you differentiate yourself from being an answering service in terms of your hiring structure and just how you work with your people?

Tami: We try to hire from referrals and word of mouth. We try to take our best telephone service representatives and get referrals. We screen everyone on the phone before we bring applicants in for an interview.

If they can't communicate on the phone with us or if they can't leave a message that is full of energy and sounds like somebody we want to talk to, then we don't even entertain an interview. We know they're not going to be able to do the job.

We also try to hire people who are new to this kind of business because we don't want people who have been at other call centers and developed bad habits. We want to train them how we want it done. We don't want them trying to read a book or doing homework or eating pizza at their desk. We want them focused on the job at hand.

We tell them they need a song in their voice and a smile on their face every time they pick up the phone and receive calls. We can blind monitor

CARS call center.

them and they don't know that we're listening. We can sit side-by-side, hearing everything and seeing what's happening on the screen. Every seven to 10 days they get coached for 30 minutes and listen to their calls and their peers' calls. There are some great calls and we want to see more of those. If we do hear an issue, it's addressed immediately. We don't wait until the next coaching session to take action.

Are you checking the calls from a compliance angle, too?

Tami: Yes.

Ken: From time to time, we have had a client call up and ask why we said something. We tell them to give us the time, date and the person and we'll find out why we answered as we did. We'll find that call and play it back. And to be honest, most of the time we didn't say it. Most of the times, it's one of the school's representatives that said what they claimed we said. We tell people to follow the script and if they stay with the script they're going to be all right.

You're totally scalable, but a minimum client size is really driven by the size of the admissions staff, correct?

Ken: The size of the admissions staff can be smaller on regeneration because we're setting an appointment for them to come in. Occasionally, we'll want to transfer, but generally we set up appointments for the student to come in or for the school to call the student back. In that case it can be a smaller client if there's not a transfer involved.

We've gone into leads, but if the system is used by schools in other areas like their academics we can go in and call the list and report academic information to the college.

Let's say we have a new quarter starting and we want to get a message to and response from their students. We can load in their data for their students and make a call to deliver the message.

Tami: For some schools, we do two or three different campaigns for them before each start. They'll send us a list of people who are in school, but who haven't registered yet for the next semester. We'll call all those people. Sometimes they have a question and need to talk to someone so we'll transfer them to the school. But most of the time, we just capture the information, why they haven't registered and send it back to the school.

Can you do placement verification?

Ken: Yes.

Do you do that currently?

Ken: That's one of the things we did with ABC College Online, but we haven't done it for a while. Now, we do have a retention program that we're developing called RSVP. We're going to use it particularly in online situations where we'll schedule certain proactive calls to remind the student of certain things, to solicit information from the students and to engage them. We're trying to find out if everything is OK through a scripted message, and if it isn't, we refer a particular department to the student or the student to a department.

Ann: That's especially important for online schools because students don't know who to call and they don't know what to do. They may have a problem with books, need to change their schedule, or drop a class.

This is not in force right now, but it is how we designed the program to work. We would have a liaison with that particular institute and we would refer the problems to them. Then we would make a callback in a set period of days and ask if the problem was resolved? We would also set it up so we could contract with schools to do it twice or three times a quarter for their continuing students, to ask how final exams went or to remind them that exams are only a week away. Sometimes you can save that student before he/she actually gets too far behind and drops out. That is what this is designed to do.

Ken: We haven't worked out some of the technical things like scheduling. We've got a lot of coding to do.

So you're trying to give a person a human voice to what otherwise is an electronic experience?

Ken: I think that is one of the hardest things in online schools; there is no one to commiserate with. I think this is something that's going to be really big once we get everything worked out.

Written by Barbara A. Schmitz.