

Adding Prospects, Contacts and Transactions

Prospects are potential students of your organisation. Take2 has useful ways of helping you to turn your prospects into students. This functionality can replace other Customer relationship manager (CRM) software and avoid repeated data entry.

Entering a Prospect

1. From the main menu, **click** *Contacts*,
2. **Click** *Prospects*.
3. **Click** *Add*.
4. **Type** the required information, and **click** *Save*.

The prospect can also be recorded with a *Prospect Type* on the *Contacts* tab.

1. **Click** the drop-down box,
2. **Click** the type.
3. **Click** *save*.

See tipsheet 46 for instructions on how to customise this prospect type values, and tipsheets 47 and 48 on how this is useful for communications and reporting.

Creating a Contact

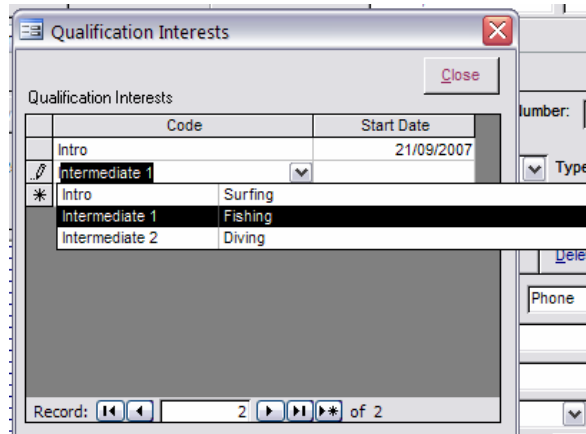
The screenshot shows the 'Prospects' application window. At the top, there are buttons for 'Select Prospect' and 'Advanced Search', and a 'Selected Person' field with the name 'White, Blanche' and ID '3128'. Below this are tabs for 'Basic Details', 'Contacts', 'Extras', and 'Standard Bring-Ups'. The 'Contacts' tab is selected. On the left, there is a panel labeled 'Contacts and Transactions' which currently displays 'No Contacts'. On the right, there is a 'Contact' form with various fields: 'Date' (24/09/2007), 'Mode' (dropdown), 'Promotion' (dropdown), 'Recruitment' (dropdown), 'Marketer' (dropdown), 'Warmth' (3), and 'Notes'. There is also an 'Interest' button and a 'Record Created' field showing '24/09/2007'.

A contact is useful when wanting to record that a prospect has contacted your organisation to find out about studying. At the left of the *Contacts* tab is a panel labelled *Contacts and Transactions* which initially displays the words “No Contacts”.

1. Click the *No Contacts* entry.
2. Click *Add* to the right of the *Contacts and Transactions* panel.
3. Optionally you can record the *Mode* (how the prospect got in touch), the *Promotion* (why the prospect got in touch) and the *Recruitment* (the source).

This is a close-up of the 'Warmth' dropdown menu. The menu is open, showing a list of options: 1 Cool, 2, 3 Interested, 4, and 5 Hot. The '3 Interested' option is currently selected.

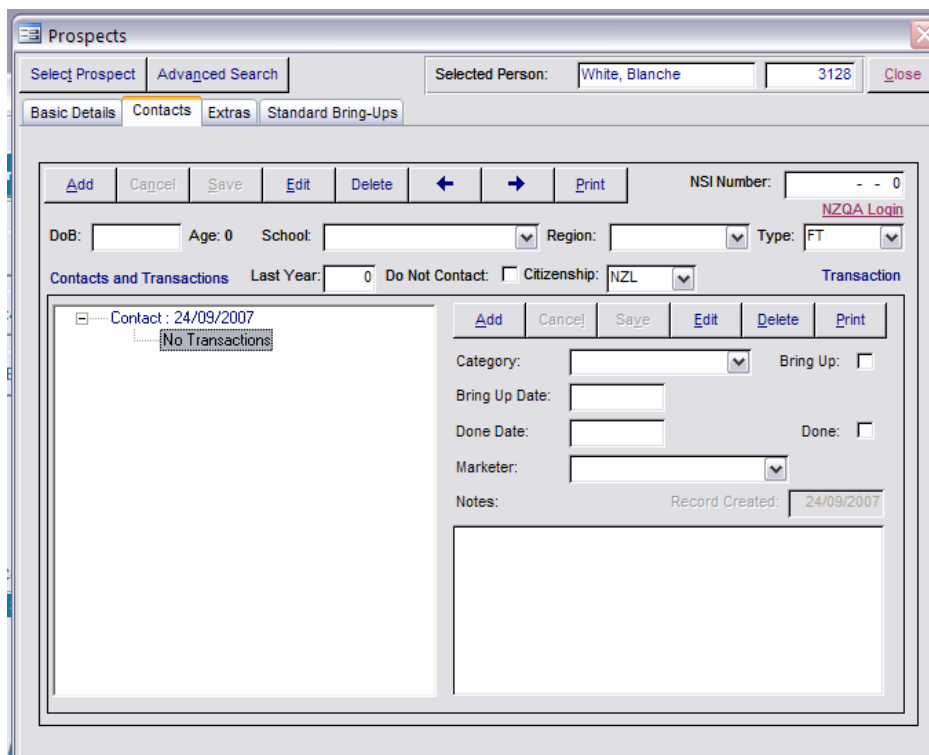
4. You can also record the “warmth” of a contact with the list, from 1 (cool) to 5 (hot).
5. Click *Save*.
6. Click *Interest* to record what the prospect is interested in studying.



You can use these features to classify contacts in a way that enables you to focus on those most likely to have a positive outcome. The prospect reporting functionality provides warmth and interest as a selection criterion, as does the prospect selection and communication functionality.

Creating a Transaction

For each contact you may add several transactions with the prospect. For example, you send out a brochure and then follow-up with a phone call. Then you send out an enrolment form.



When you have added a contact the detail is displayed on the right. The panel on the left shows the contact record and, below, the list of current transactions.

1. Click **No Transactions**.
2. Click **Add** to the right of the *Contacts and Transactions* panel.
3. Click the *Category* field to define what type of transaction it is.

The screenshot shows the 'Prospects' application window. At the top, there are tabs for 'Select Prospect' and 'Advanced Search'. The 'Selected Person' field contains 'White, Blanche' and '3128'. Below this are tabs for 'Basic Details', 'Contacts', 'Extras', and 'Standard Bring-Ups'. The 'Contacts' tab is active, showing a list of transactions. A dropdown menu is open, showing various categories and their corresponding bring-up dates. The categories listed are: ENROLLED (Enrolment Form), INDUCTION (Attended an Induction day), INTERVIEW (Interview set up), LETTER1 (Standard Letter 1), LETTER2 (Final Letter), NO INTEREST (Not interested at all), NO SHOW (Did not attend interview/O/Day), and OPEN DAY (Attended an open day here).

4. Click **Save**.

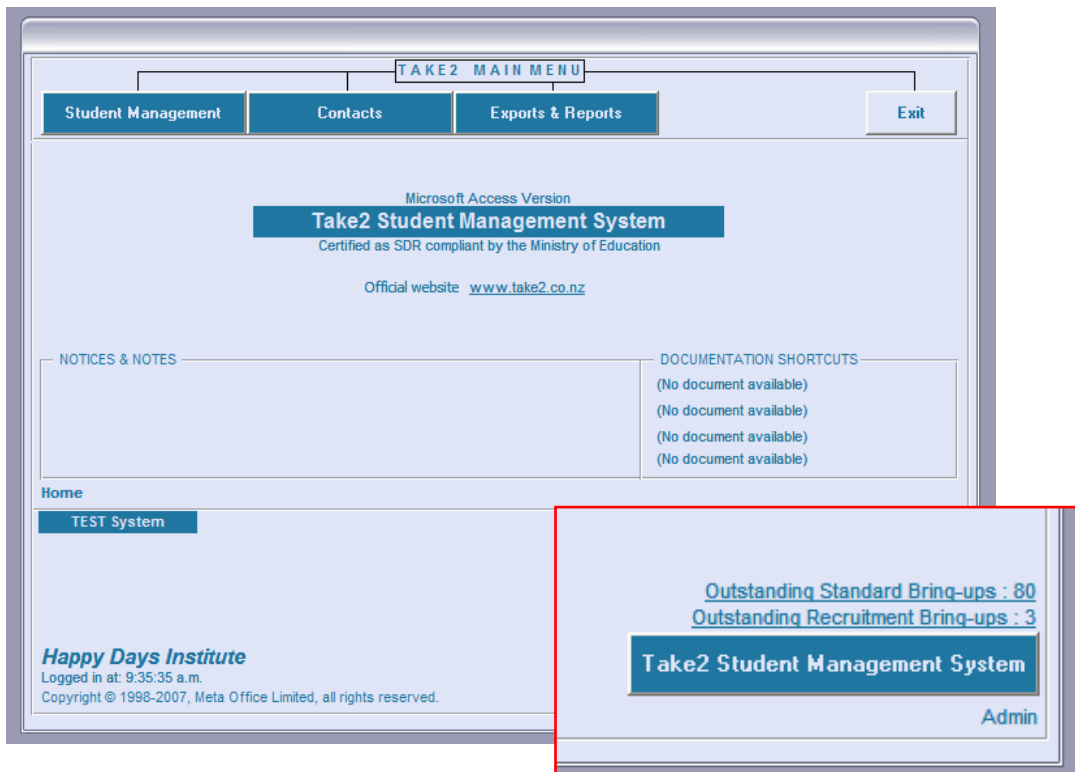
Bring-Ups

When you add a transaction, if it is for a Category for which marketing bring-ups are to be created, the *Bring-Up* field is ticked and a default *Bring-Up Date* is entered automatically. You can mark any transaction as a bring up, even those that are not categorised that way:

1. Click **Edit**.
2. Tick *bring up*, and **Type** a bring up date.
3. Click **Save**.

You can also edit the *Done Date* and *Done* fields in the same way. These two fields are used to record whether a marketing bring-up has been actioned.

Outstanding prospect bring-ups are prominently displayed on every screen of the main menu as *Recruitment Bring-ups*.



Click the *Recruitment Bring-ups* link to review your bring ups.

