

Make Calls Using Data from Other Offices

- Decide on the information you need.
- Think about what data is available.
- Create an attribute for this information.
- Get the data from the external office.
- Import the information.
- Create a filter to pull your desired data.
- Write your content doc/script.
- Set up your call job.

What We Did

We wanted to find the group of students who were accepted as new freshmen for Fall 2008, had completed a Fall 2008 Housing Application, and did not have a reservation for orientation.

We contacted On-Campus Housing and asked for an excel file of all incoming freshmen with a Fall 2008 completed housing application. Our Orientation data was already coming in from Banner each night.

We created an attribute for Completed Fall 08 Housing Application. It was a simple “Y” radio button.

Once we received the data, we (along with help from our Account Manager) set up our import which was to happen daily from then on. After the first set-up, it is done within 5 minutes each morning.

We wrote our filter to find the students we really wanted!

Our basic lines of logic are below. These will obviously vary depending on your attributes!

Orientation Session is Empty
Application Term in Fall 2008
Application Student Type is First-Time Freshman
Application Status is Decision
Admissions Decision is Accepted
Fall 2008 Housing Application is Y

We wrote a script with the information needed to really push our orientation sessions and set up our call job for full-time admissions recruiters to call.