

Partnering with Collegis for Success ^[1]



March 13, 2023 by [jennifer.mortensen](#) ^[2]

While Collegis devotes ongoing time and effort to ensure a successful partnership with CU, there are key steps that campus partners can take to ensure transparency and increase the likelihood of positive outcomes.

How does Collegis ensure CU's success?

- **Coaching & Training:** Collegis coaches its callers at least three to four times per month based on interaction recordings and feedback from campus partners.
- **Tracking:** Collegis tracks and maintains all campus and program information in OneNote, and this content is updated almost daily. Each campus and program (where applicable) have a customized template to help guide conversations and ensure positive, accurate outcomes. Additionally, each campus has its own process map that can be modified according to campus needs.
- **Reporting & Benchmarking:** In addition to regular reporting sent to the campuses via email, Collegis also offers dashboards and benchmarks ^[3] on demand to provide accurate data in real time.

CAUTION While Collegis supports customization by campus and program, campus partners should use caution in the amount of information collected during the qualification and transfer. Data indicates that the shorter the call, the better the result. As such, campuses may want to focus on streamlining with only information that is needed as opposed to additional customization.

How can CU enhance its relationship and effectiveness with Collegis?

Based on experience and CU's data, there are several opportunities for campus partners to enhance their relationship with Collegis and contribute to an effective lead flow.

- **Assess Data:** While Collegis provides a variety of information related to its own benchmarks and best practices ^[3], the campuses also play a role in assessing the data provided based on other indicators into which Collegis does not have visibility, such as current marketing efforts, missed appointments, efforts with other vendors (such as Swish), etc. Shared knowledge is key in establishing a firm foundation for success.
- **Minimize Customization:** Data indicates that shorter qualification and transfer calls are most successful. When customizing scripts, campuses should work to collect only information that is required for a second interaction and keep customization to a

minimum.

- **Share Campaign Details:** Sharing campaign/advertising outreach plans with Collegis will help them to better anticipate possible increases in inquiry volume while more effectively reporting on the success or failure of marketing efforts. Ideas to foster this transparency include:
 - Setting aside time to discuss marketing efforts in current meetings
 - Creation of a marketing calendar that is shared and updated regularly
 - Provide marketing collateral to increase awareness of efforts and help callers understand possible lead generation sources

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