Preferred Communication Method [1]

March 13, 2023 by jennifer.mortensen [2]

The contact object in the Integrated Online Services (IOS) org contains several fields related to preferred communication method. These fields include the following:

Personal Preferences

- Preferred First Name
- Pronouns (he/him/his, she/her/hers, they/them/theirs, ze/zim/zir)

Contact Preferences

- Preferred communication channel (call, text, email, other)
- Preferred contact day (weekday, weekend) (not editable)
- Preferred contact time (not editable)

How are preferences generated and recorded?

Some preferences are generated and recorded through lead conversations with enrollment navigators, but this information is recorded inconsistently. Recording preferred communication methods is particularly valuable, however, when you are streamlining efforts to communicate with leads wholistically rather than through one-off interactions. For example, you could consider:

- Batching leads by preferred communication channel and preferred contact day/time and sending communications based on that data
- Understanding the effectiveness of preferred outreach methods vs. other methods in moving leads through the pipeline
- Sending appointment invitations to leads that contain availability in alignment with their preferences
- Sending appointment reminders to leads during a time in which they are available to receive them
- Understanding when most of your leads are available so you can schedule outreach and events that have an increased likelihood of engagement

Note
Collegis also collects both personal and communication preferences from leads, but not all of this data is sent back to IOS. If the campuses are interested in capturing this data more

effectively, please raise this as a topic during an upcoming governance meeting. Additionally, Collegis is able to adjust its outreach methods based on preferred communication methods; this effort would need to occur in tandem with data collection modifications in various areas.
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