

MASTER THE ART OF GROWING & MANAGING FUTURE ENROLLMENTS

Discover the 10 golden rules you need to
implement for your prospect pipeline

March 2020



INTRODUCTION

Every school - no matter the size - needs to market itself. Why? Simply because every school's future is always reliant on new students commencing. If that slows down or stops, major problems occur.

We've been working with schools on marketing plans, campaigns and pipeline analysis for decades. And yet we see the same mistakes repeated consistently.

To reach your lead (future family) generation and engagement goals, you need to select the right tools, best channels of communication and adopt the most effective processes. Combine this with the right messaging, great content to educate prospects on your value proposition and, above all, nurturing to build those relationships will see your results soar.

While this document covers some of these items, it really zeroes in on the 10 things we think schools have to do to be successful.

While Enquiry Tracker plays an important role in helping with these strategies, you can make a start today by using these ideas and tips to see immediate improvement.

Importantly, we've also focused on techniques that are designed to get more prospects and turn them into raving fans. A lot of this comes down to positioning, personalized communication and how you establish a trusted relationship with your prospects.

Think differently and be willing to change. Don't fall into the old safety net of 'that's not the way we do it. Remember 'if you keep doing what you have always done, you will keep getting the same result'.

Enjoy.

Gregory & Antony Campitelli
Founders of Enquiry Tracker

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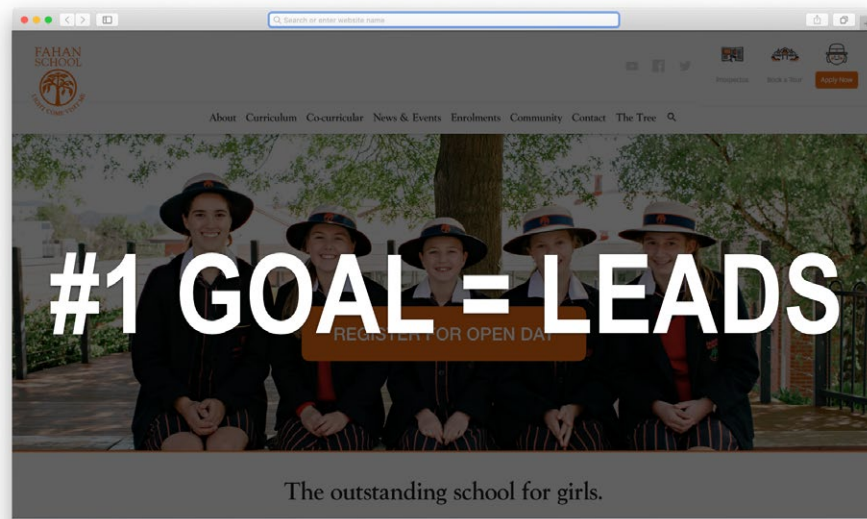
1. UNDERSTAND THE PRIMARY GOAL OF YOUR WEBSITE

The lifeline of every educational institution is future enrollments. Yet as a sector, we do little to monitor or capture future inquiry data. We are great at managing the current student body and immediate incoming cohort, but when it comes to the longitudinal forecast, not so much. Ironically, this is the very data that Boards, Principals, Business Managers and other key decision makers need at their fingertip.

They want to know what the big picture looks like 2, 5 or even 10 years out. They want to understand how the metrics are performing compared to prior years, how diverse the school will look compared to its goals. You have to know about the 'prospects in the pipeline'.

A website is a powerful asset for any school, yet many confuse its primary purpose. With families now accessing information via portals, the website can focus solely on one area - **engaging future families**. Naturally, an attractive site that is regularly updated with information can grab the interest of a family, but actually its serves as the perfect opportunity to capture critical information to build your pipeline.

Therefore, the primary goal of your website is to capture leads.



Be sure to focus on capturing leads versus other agenda items

The best way to achieve this goal is to place customized forms on your website that capture specific data efficiently and consistently while dealing with the query in a professional manner.

In fact, this is the core of Enquiry Tracker: it allows any school to pop up an instant web form on its website and capture data quickly and simply, and to instantly analyze the results.

Always drive traffic to your landing pages, where visitors enter in an email address. Whether it's registering for an event, requesting an information pack or something else where they can learn more - just make it interesting and informative.

Stay true to this model and focus on capturing the leads on your website as they are the ones that fill your pipeline.



HOT TIPS:

- Ensure you have web forms to capture these inquiries
- Provide substantive content that justifies someone wanting to give you their email address

The Result: More leads = more applications for enrollment

2. USE A CENTRALIZED DATABASE TO STORE LEADS

Now we have placed forms on the website to capture the data, where does the inquiry go?

For some schools, it simply generates an email to an inbox waiting patiently for a staff member to reply while other schools automatically or manually enter the data into some other source. It is quite remarkable to see how many schools are battling away managing all their inquiry data in a spreadsheet, some with hundreds of rows and columns, totally overwhelming.

There is a better way: a database. Because databases store information more efficiently, they can handle volumes of information that are unmanageable in a spreadsheet.

As professionals, we searched for a dedicated system that was built solely for the education sector. However, we could not find one that met the needs of admissions & marketing staff, so we developed Enquiry Tracker. It takes all those leads and web form submissions from your website into one central database. One that you can access at your fingertips from anywhere.

In our experience we often see staff members with different responsibilities. For example, one person runs major events, such as Open Houses; another looks after admissions; the Principal's assistant coordinates private tours; and the receptionist deals with casual queries. All of which are often stored in disparate systems. It is fragmented.

A centralized system, like Enquiry Tracker, allows all staff to be on the same page quickly and efficiently. Moreover, it is important to track historical interactions, so when a family engages with the school we understand the nuances of the relationship.



HOT TIPS:

- Store all the inquiry data into one central repository, ideally a database
- Ensure that is accessible by all staff who are engaged with future families

The Result: centralized and coordinated response in an easy-to-use system

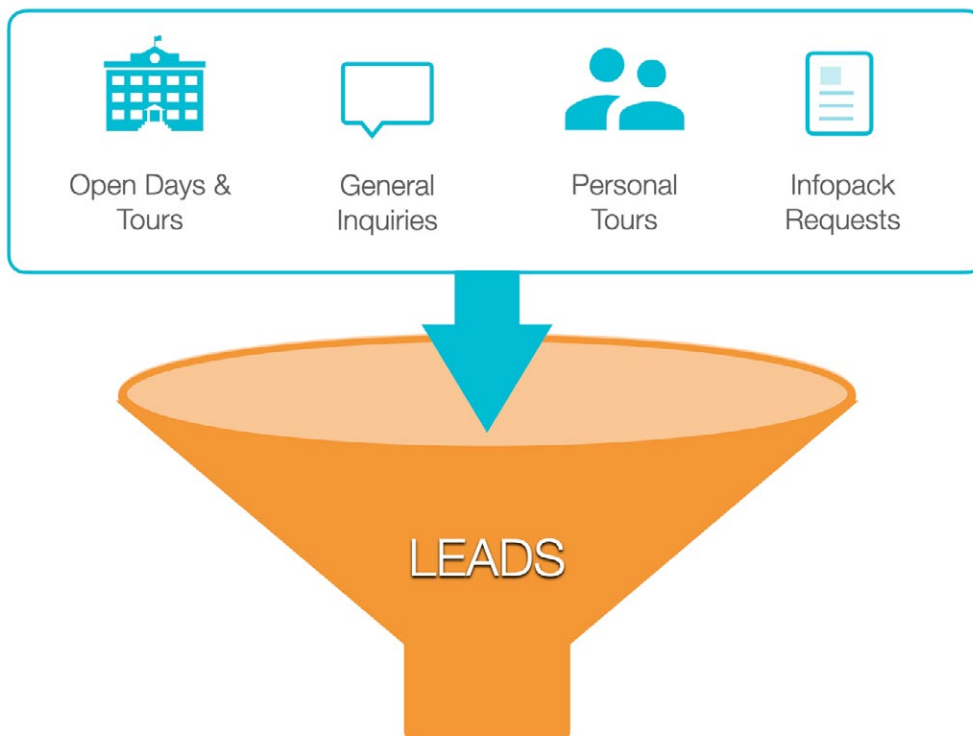
3. KNOW WHERE YOUR LEADS ARE COMING FROM

Now that the data is centrally stored in a database, let's focus on *how* they got there.

One of the most fundamental mistakes we see schools' struggle with is - how did we capture that lead in the first place? Now, there is a subtle difference between *why* a family may choose your school (word of mouth, reputation etc.) and *what* method of lead capture is the most effective.

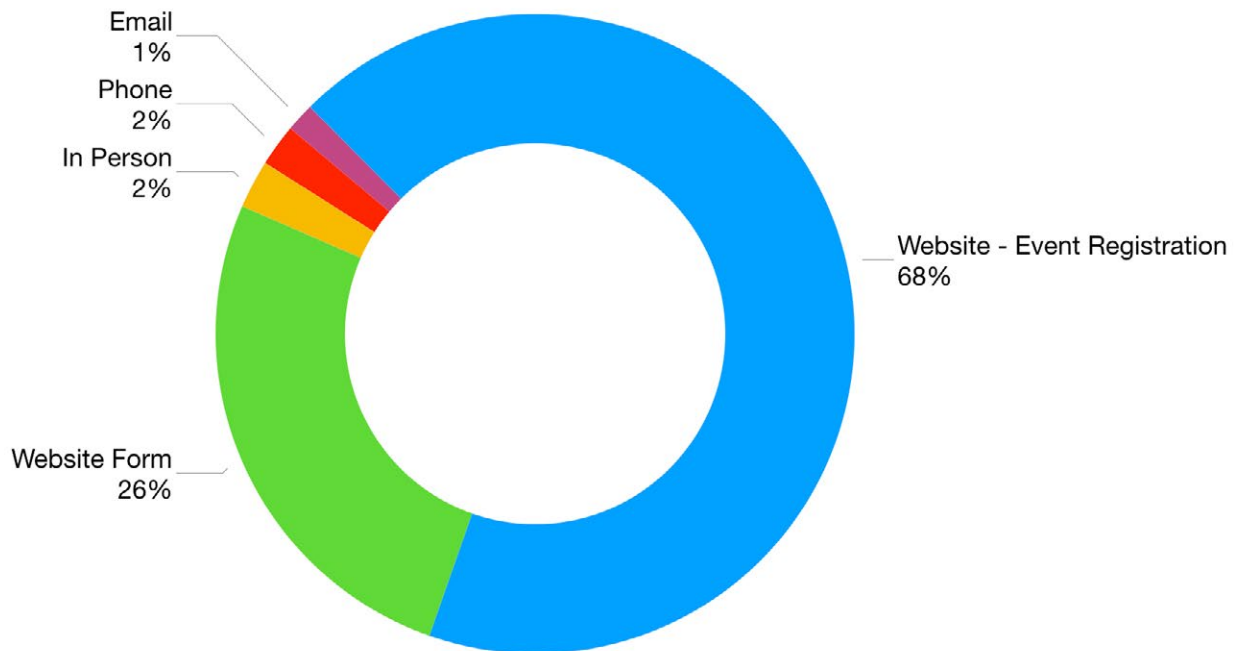
Our experience and research tells us the answer to where school leads are coming from is invariably one of the following 4 methods:

1. **School Event** - the family registered for an event, such as an Open House, or came to a School Tour
2. **Enrollment Inquiry** - they made a general inquiry, online, via phone or email to ask an enrollment question
3. **Personal Tour** - the family took part in a private tour of the school
4. **Information Pack** - they requested a viewbook or information pack



The four common sources for school leads

At Enquiry Tracker, we analyzed data from over 20,000 records, and it clearly shows that the vast majority of leads, 94% are captured via web forms and website registrations, with less than 6% from walk ins, phone and email! It's a no-brainer where your energies should go!



Top 5 sources for school leads



HOT TIPS:

- Have event registration, enrollment inquiry forms on your website.
- Be sure to track the lead source for every single inquiry

The Result: Greater understanding of where leads are coming from means precious marketing dollars can be directed more strategically

4. MAKE KEY INQUIRY FORMS PROMINENT ON YOUR WEBSITE

So we have established that the primary goal of your website is to capture leads; we have presented the advantages of a centralized database; we have identified the top lead source as being your web forms. So, now you have to make sure these are easy to find.

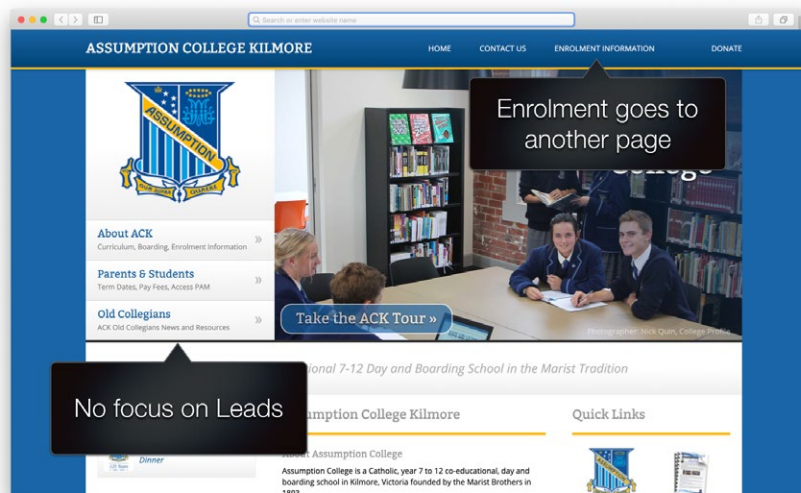
Today, families are online, so make it easy for them to find what they are looking for online. Don't make the costly mistake of burying critical information, like event registration, deep on your website under a menu or several clicks in: will they know where to find it?

So, how easy is your website to navigate? Ask someone who does not work at your school, to perform each of the big four:

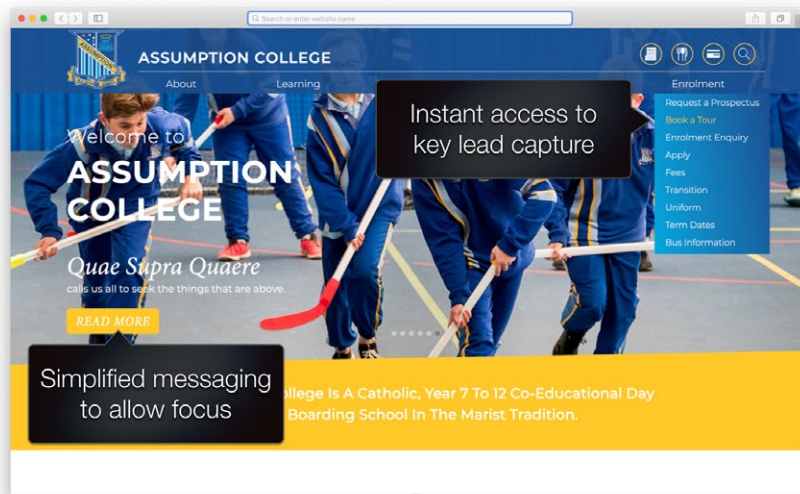
1. Register for an event;
2. Request an information pack;
3. Book a 1:1 personal tour; and
4. Make a general enrollment inquiry.

Watch them perform each of these, let them do it themselves, and see if they can quickly complete the task. Get honest feedback and make changes to your website based on what you have discovered.

Case Study: Take a look at these before and after images of a school's home page. One asks visitors to call and makes it hard to find those ever-important links, while the other makes it easy. Which one are you?



Before: Avoid prioritising other audiences such as current parents and alumni. Don't bury important information deep in your site



After: Make sure top sources are front and centre for future families to find easily



HOT TIPS:

- Make your key web forms easy to find and easy to use
- Consider adding them in a prominent position in your website header
- Get some friends to feedback on the ease of use for your website
- Set up analytics to monitor which pages are popular and what lead sources and campaigns are driving traffic

The Result: More leads = more applications for enrollment

5. ASK THE RIGHT QUESTIONS ON YOUR WEB FORMS

Now you have web forms running on your website, and they are prominent, you must avoid falling for the trap of asking so many questions that the experience becomes intrusive. Sometimes less is best, and with the right system you can always gather more data later on.

Firstly consider:

1. What information do you need to know to establish an accurate pipeline?
2. What information do you need to gather to follow up?
3. Which marketing campaigns are working?

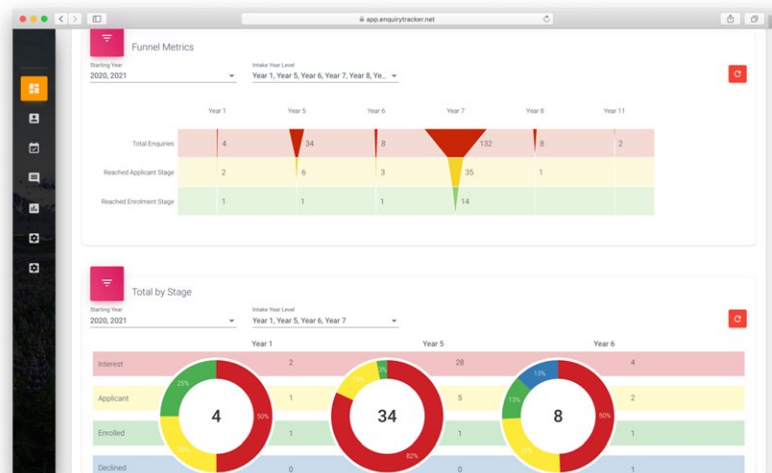
Understanding your Pipeline

Your pipeline revolves around knowing how many potential students you have coming in to your school at any given time - even years out. You need a minimum amount of information for forecasting purposes. The scope of this varies broadly dependent on your offerings, so if gender and diversity are important, then you should collect it.

At a minimum, the fields to collect on your online forms for your pipeline are:

- Student Name i.e. First and Last Name
- Calendar year of entry i.e. 2023
- Grade year level i.e. Year 8

With this data on hand you will know the number of potential candidates for any given year and intake year level. Now you can build funnel charts for forecasting purposes: Enquiry Tracker does this for you.



Enquiry Tracker has funnel metrics by stage for key intake years and levels provide a clear picture of the status of your pipeline

Personalized Communication

In order to build a relationship you must get an email address. Furthermore, it is always good practice to capture the parent or guardian's name, so you can personalize your communications.

At a minimum, the fields to collect on your forms are:

- First and Last Name
- Email address - make sure it is correctly formatted
- Phone number (optional but good practice as it allows that personal touch)

This data, combined with your student information, enables you to send personalized emails to your future families that are timely and on topic. For example, only send impending application deadline emails if they are planning to enroll in an upcoming year! Make sure they are relevant.

Key Campaign Metrics

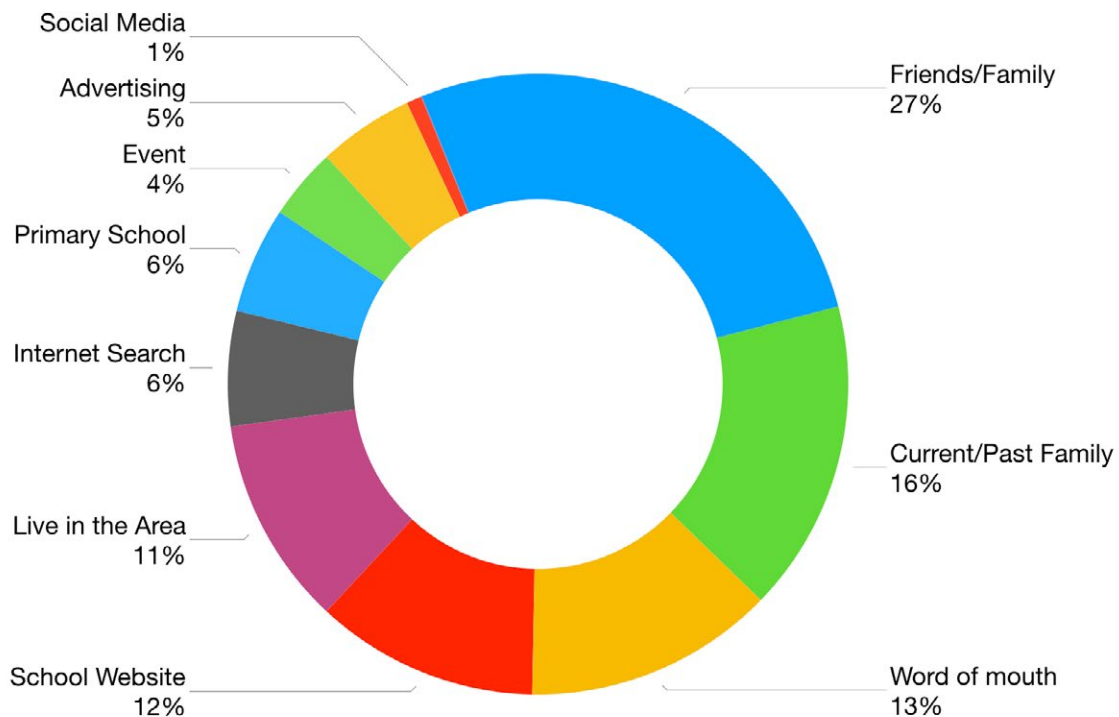
As we covered under strategy #3, it is important you know how leads are coming in to your system. Well it is just as important to know how families heard about you. We recommend you do this in two ways:

1. Always ask the question - "How did you hear about our school?" Offer a menu of options to choose from as it will help with insights.
2. Embrace analytics, like Google Tag Manager and Google Analytics to monitor any clickthrough activity on digital campaigns and other sources of traffic.

Remember that there is a subtle difference between *how* a future family heard about you and *what* drove them to come to your website to fill out a form on any particular day. Consider the following:

For Example: You are running a Facebook ad campaign to promote an upcoming event e.g. Open House. A prospect sees the ad and clicks on it. They fill out the event registration form and say they heard about your school 'from a friend'.

At Enquiry Tracker, we have analyzed the data from thousands of families, the top 10 sources are:

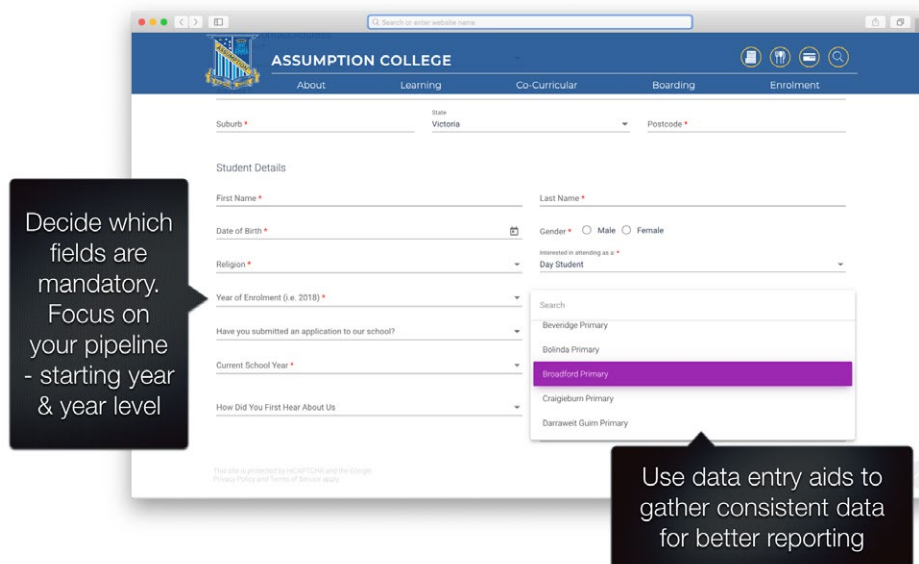


"How did you hear about us" - top 10 self-declared responses for school inquiries

The data you have here is two-fold.

1. You are measuring the Return on Investment (ROI) on your Facebook advertising, i.e. a person clicked on the ad and went to your site where they filled in a form. As a result, you know **how much every lead cost** you to get from that campaign.
2. Secondly, there is a difference between whether they heard about your school from **advertising** or **from a friend**, in this example, while they clicked on an ad they actually heard about you **from a friend**.

In fact, both these pieces of data are important and will influence how you spend precious marketing dollars for your school.



Use data entry aids on your forms to capture data consistently and make sure key fields are mandatory for reporting purposes.



HOT TIPS:

- Use data entry aids for fields such as “Intake Year Level”, “Current School” and “How did you hear about us?” etc. to gather consistent data for better reporting
- Decide which fields are mandatory on your web forms - only have the minimum number of fields e.g. Email address for personalized communication and what year is this potential student interested in starting at my school
- Use analytics such as Google Analytics and Google Tag Manager to monitor the success of your campaigns and form completions and pre-populated pick lists to capture the right data about how they hear about your school.

The Result: Greater understanding and segmentation of your audience

6. FOLLOW UP WITH RELEVANT COMMUNICATION IN A TIMELY MANNER

Now you are successfully capturing leads, the key is to make sure you follow up on all of them in a timely manner. The most common mistake for many schools is the failure to have adequate follow up because they are time poor and lack the systems to automate the process. This is exacerbated when the volume of inquiries is high, like at a major school event, where you need systems and processes in place to make sure you respond quickly.

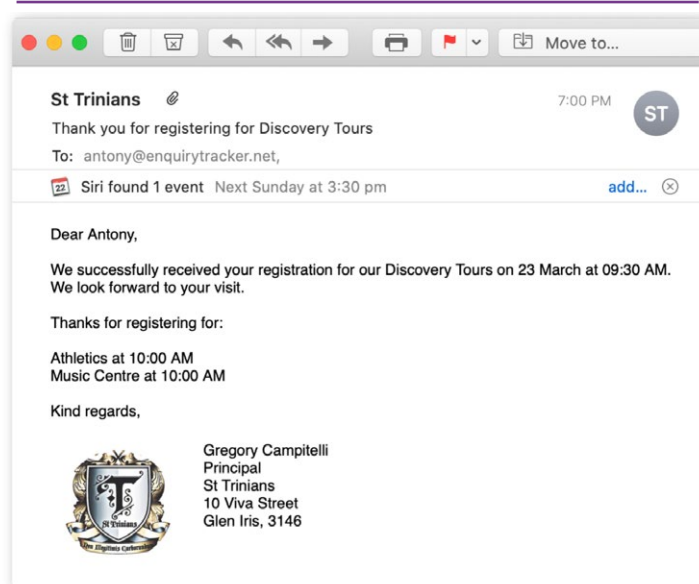
Always follow up

No matter the inquiry you need to be sure to follow up as it is a strong indicator of your brand. You certainly don't want families saying, "Oh, I reached out to that school, but they never got back to me." Conversely, having someone be amazed at how well you follow up can have a markedly different impact. For example, with event registrations a simple courtesy is for all families to receive a personalized email acknowledging their interest.

Send your email with a purpose

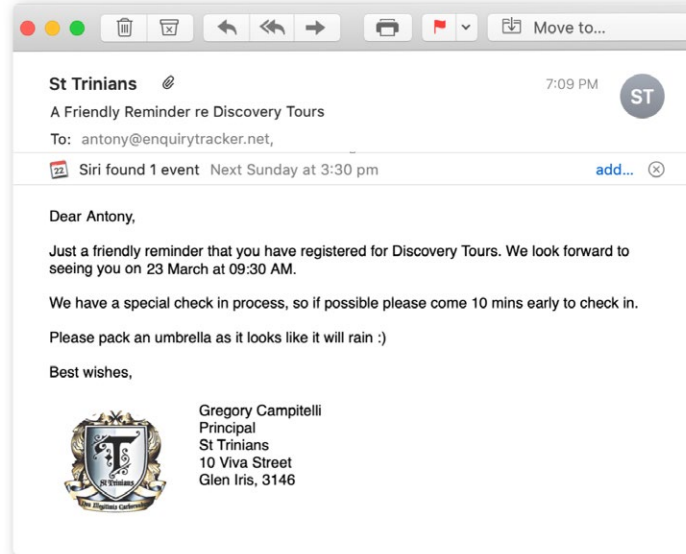
In fact, anytime you send an email it should always come with a call-to-action. Consider the following email sequence for a family who registers to attend a School Tour.

Thanks for registering email



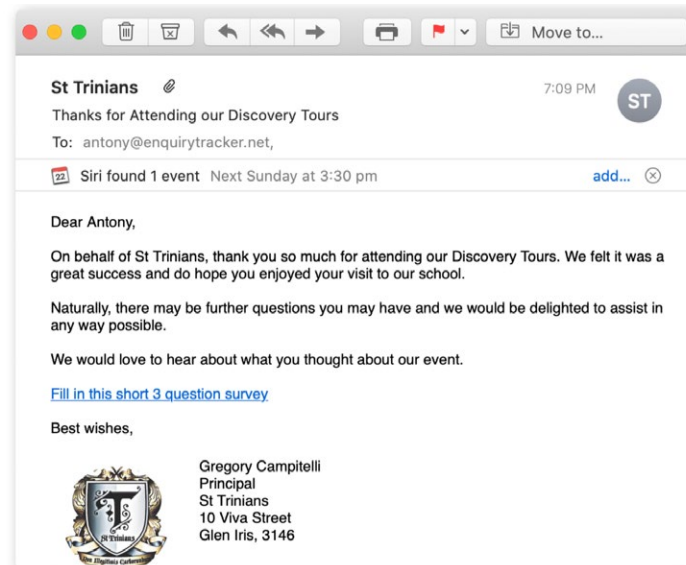
Sent to confirm that you received their registration. If you want to boost attendance ratios and reduce 'no-shows', include a calendar invite with the original email.

The critical reminder email



Send a friendly reminder the day before the event so they remember to attend along with any last minute pieces of advice - like where to park etc.

Post event follow-up email



It's always good practice to send thank you emails to those who attended, but equally as well send a 'sorry-we-missed-you' emails to those that could not make it.

Most schools simply don't do these things as they are too time consuming or complex, this is where technology comes into its own.

Use technology to automate these tasks

You have to make sure that for any web form completed or inquiry made, you follow-up automatically: technology can do this. Have a simple email sequence (a series of pre-written emails) for event registrations, and another for general inquiry forms that are sent automatically.

Enquiry Tracker automates this process for you entirely, from instant sign-up forms on your website to automated drip emails. We feel it is critical that all participants get personalized, school-branded emails along with a calendar invite so they don't forget. There is no better way to get your relationship off to a solid start than with timely follow up!



HOT TIPS:

- Follow up with a personalized email
i.e. Dear <First Name> and not a pretty template as they want to know they are communicating with a person
- Use conversational style copy in your email - write as if you were talking to them directly and not in general corporate speak
- Always include a call-to-action, whether it is add the event to your calendar or get feedback by completing a survey

The Result: Increased customer service = impressed families who tell their friends = greater demand for enrollment

7. TREAT ALL FAMILIES AS INDIVIDUALS

Given you have asked the right questions, you'll be able to easily segment your audience and send them the most relevant information. Segmenting is treating everyone differently.

Many schools don't capture the right data, so they are unable to easily segment their communications. So they simply send group communications to *everyone*, e.g. inviting *everyone* to the school musical or sending *everyone* a copy of the school magazine. A better system allows highly personalized communications based on when the student is starting and what interests they may have that match to your school's programs.

This may seem 100% obvious at first, but let's take a moment to review. There are 3 questions to consider when communicating to your audiences:

1. When will the student be a potential applicant to start at the school?
2. What are the students' interests?
3. What level of engagement has the family already had with the school?

Let's dissect each of these.

Email Communication is Aligned with Start Date

If the family registering for an event has a child that is potentially starting in the next 2 years then you would send emails at a higher frequency than one that is starting in 5 years. If you know they are considering an upcoming year, then you will definitely email them frequently and notify them of key deadlines, such as application due dates, so they don't miss out. Likewise, if they are not starting for several years, then you may only email them twice a year to keep them apprised of interesting developments or results that your school is producing.

Student Interests

Schools have an extraordinary amount to offer. Extra curricular programs and specialist areas of study can engage and excite families. Why not list these as selectable items on your web forms or alternatively capture them during an event or school visit? *See strategy #8 for more information on this topic.*

Capturing this information provides a unique opportunity to find out more about the potential student: are they interested in sports, drama, art or anything else that the

school offers? What if you knew they were a girl interested in robotics or a boy who loves dance? You could reflect that understanding in your email communication. You might even introduce new programs.

The screenshot shows a digital form on a tablet. At the top, there are dropdown menus for 'Year 6', 'Darwin Primary', and 'Student Type' (set to 'Day Student'). Below these are fields for 'Seeking Enrolment in Year Level' (Year 7), 'Starting Year' (2022), and 'International Student' (Yes/No, with 'No' selected). There are also radio buttons for 'Siblings (Past/Present)' and 'Alumni'. A section for 'Family believes they have submitted an application' has radio buttons for 'Yes', 'No', and 'Unsure'. The 'Other Interests' section is a grid of checkboxes, with 'Robotics', 'Math', and 'Chess' checked. At the bottom right, there are 'CANCEL' and 'SAVE' buttons.

With Enquiry Tracker, staff and student representatives can easily add key student interests for future marketing opportunities.

Family Demographics

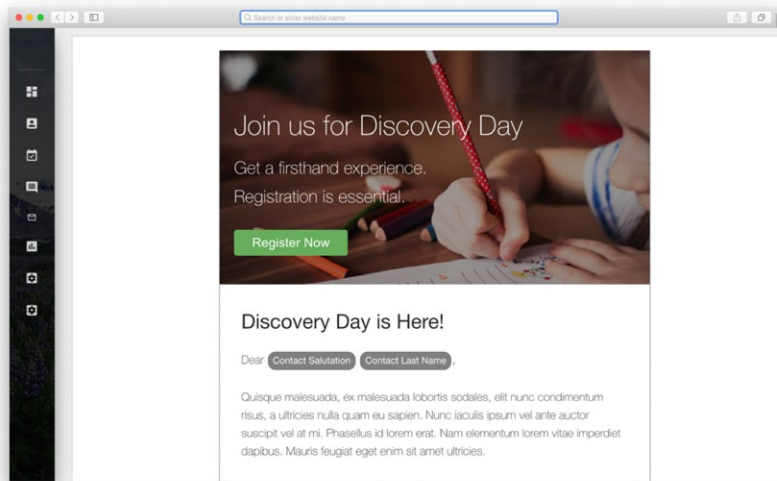
Ideally, it would be great to know as much as you can about families *before* they visit your school. Are they alumni? Do they live locally? Is this their first or second tour? What elementary school do they attend? How many times have they interacted with your school?

This kind of demographic profiling raises the bar – thankfully, Enquiry Tracker allows you to capture these essential elements.

With this information in hand, you can find a subset of your audience to communicate relevant content, for example;

- Send a come-and-try day for those who love chess or a sport
- Invite girls interested in robotics to come to the summer robotics camp with other potential girls in the same cohort group.
- Invite those interested in music or drama to the annual recital or play

You get the idea...



Enquiry Tracker allows you to send relevant personalized content to families



HOT TIPS:

- Be sure you only send relevant content to those that want it and expect it
- Send attractive personalized emails for major events and areas of interests
- Be sure to stay focused on their interests and match to your offerings

The Result: Happier prospects because they can tell you are listening to them, you are speaking directly to them and that you understand and you know their child.

8. LEVERAGE YOUR BEST BRAND ASSET - YOUR STUDENTS

Now that families have booked to come to an event, this is the moment where you can utilize your greatest asset - your students. Sadly, this is where some schools miss the boat by not allowing, or not fully maximizing, students as tour ambassadors at major events.

This is misplaced opportunity.

Why? All schools readily accept the proposition that students are their best asset as they represent the product of your hard work. How they conduct themselves in public, how they communicate about your school, and how they interact with others is one of your best marketing tools.

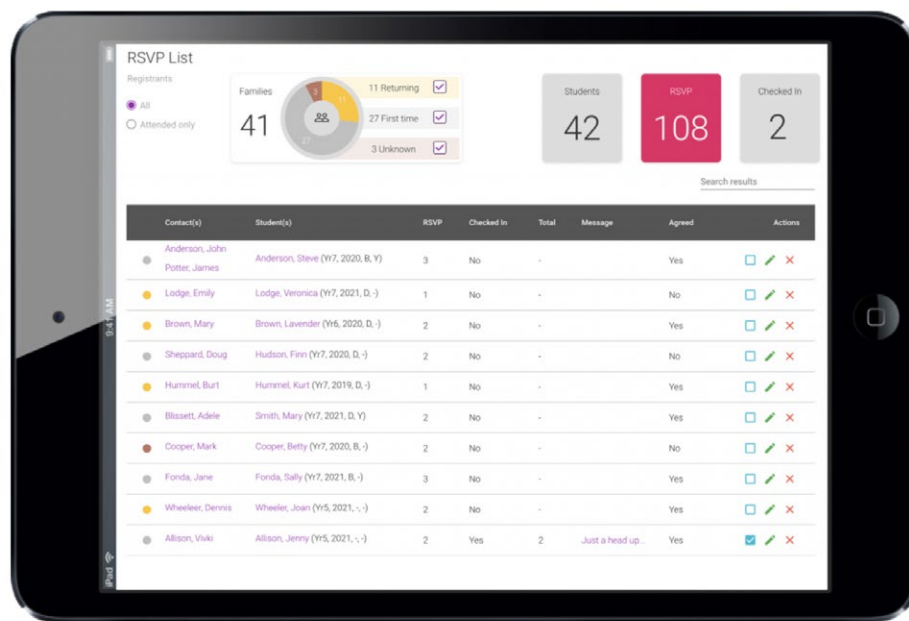
Consider putting your students in a formal leadership position as ambassadors at events. (In fact, doing so ensures these leadership positions are accessible to a far greater student demographic rather than the usual leadership suspects.) Since events are one of the most popular ways for families to learn about your school, why not have students actively participate in welcoming families as they arrive?



Students use Enquiry Tracker to check-in families and gather additional information

For Example: Have student ambassadors welcome parents as they arrive at your school, better still ensure they are armed with a tablet to check-in families as paper-based are not nearly as reliable or impressive. Apart from saving the staff time in doing these tasks, the sub-text message to parents says - 'We place students in positions of leadership, while the tablets indicate the school is digitally savvy and ahead of the game'.

With Enquiry Tracker, it is those very same tablets that allows the school to gather more information about the family and their prospective students. How? As the student ambassadors greet the families, they have the unique opportunity to capture additional information by validating the family contact details, and with the family's permission, ask the future student a few additional questions, such as their specific areas of interest. This allows you to do a much better job marketing to families with relevant information.



Staff and student representatives use the seamless check-in mode for providing families with a great customer service experience.

Just imagine the experience of the family who arrives and is greeted by a student ambassador who chats *directly* to the family and the child - the very people they hope their own children will emulate. It will pay off!



HOT TIPS:

- Appoint student tour ambassadors and provide appropriate training
- Use the the students to greet families and ask key questions to show them that you care and get that all important information
- Allocate a budget to purchase a couple of tablets as they beat paper-based systems

The Result: Super impressed families who openly tell others about their experience, they become your champions in the community.

9. LISTEN TO YOUR MOST IMPORTANT PEOPLE

Asking people what they think instead of assuming you already know is a simple yet powerful tool to ensure you are meeting your community's expectations. This is something that many schools will say they do, but instead yield to the comfort of their own instinct. Make no mistake, a critical step is to listen genuinely, get feedback and act on the learning strategically.

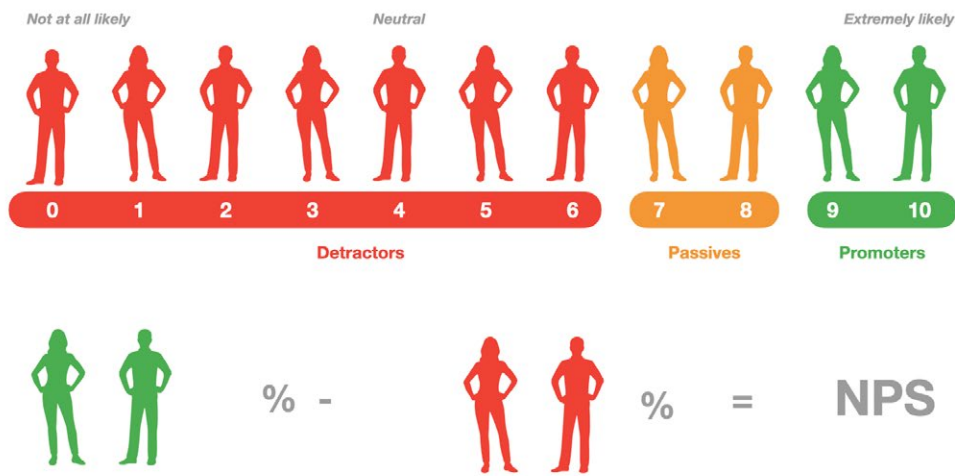
Consider the following:

1. Understand the value of your brand by implementing a Net Promoter Score (NPS) survey for your current families
2. Conduct a survey of attendees after events and personal tours
3. Involve students in the decision making process

Net Promoter Score

Net Promoter Score is a metric for assessing customer loyalty for a company's brand, products or services. It is widely used by many companies as the metric is easy to calculate. You just have to ask one simple question: "How likely is it that you would recommend our school to a friend or family?" The answer is always on a scale of 0 - 10.

NPS aims to measure the loyalty that exists between you and your consumer. An NPS can be as low as -100 (every respondent is a "detractor") or as high as +100 (every respondent is a "promoter"). A NPS of +50 is generally deemed excellent, and anything over **+70 is exceptional**.



Calculate your NPS using the answer to a key question, using a 0-10 scale:
How likely is it that you would recommend [school] to a friend or colleague?

Consider conducting an NPS survey of your future, current and past families and use this as a benchmark to improve.

Survey Attendees

After conducting an Open House or School Tour, consider sending out a short survey with a few questions. Consider adding NPS as the first question, and here are a few others to consider:

1. Overall, how would you rate our event? Use a scale of 1 - 5 so you can have a benchmark for your next event.
2. What did we do well?
3. How do you think we can improve?

Be sure to check out Survey Monkey as they provide a **sample** you can use.

Get Students Involved

Take a new approach to solving problems. Consider for a moment, that your best assets are most likely your students and having their input may prove to be insightful. Consider having students involved when conducting surveys and analyzing the data. Form a committee or have a group of students brainstorm ideas about what can be done differently to improve survey results.

Maybe give them a challenge to see what they can come up with - what they believe families and their children would also like to learn about your school. We assure you they will come up with some interesting and creative ideas!



HOT TIPS:

- Survey all event attendees and be sure to include the NPS question: On a scale of 0-10, how likely are you to recommend our school to a friend?
- Send an automated email to all attendees so you can get feedback in a timely manner
- Get students involved to analyze results and suggest solutions

The Result: A benchmark for you to improve on!

10. ANALYZE THE DATA TO MAKE INFORMED DECISIONS

Schools spend precious marketing dollars to get people to come to the school, but how do you manage the outcome, how do you know if the tours were successful, what is the conversion ratio? We find many schools struggle to produce these answers easily and quickly.

It is essential to have the critical analytics and insights to monitor progress - in real time! From demographics and event performance to geographic data and the ever-important feeder school information, without these insights you will be often relying on your instincts.

Can you answer the following questions about your inquiries?

- How many families that attended an event last year have already submitted an application?
- What events work better than others?
- How many students are in your pipeline for 2, 3, even 5 years out?
- How did families hear about your open house/school?
- How did they make initial contact with your school?
- What's their current relationship with your school?
e.g. alumni, siblings
- Which elementary school they are currently at?
- Can you plot a geographical map of all inquiries?
- How many applications have you received for the next 5 years with break up based on gender and entry year?
- How many private tours have been conducted this year?
- How many prospectuses/info packs have been handed out?

The list of questions is endless, but these are reasonable questions for any principal, head of marketing, head of admissions to ask. This information should be easily retrieved, however, we find that while some schools are able to cobble this together, the reality is that it is not easy to get and often takes considerable effort.



With Enquiry Tracker you'll gain visibility into your future pipeline, capture the right data, effectively followup and gain precious hours back every day.

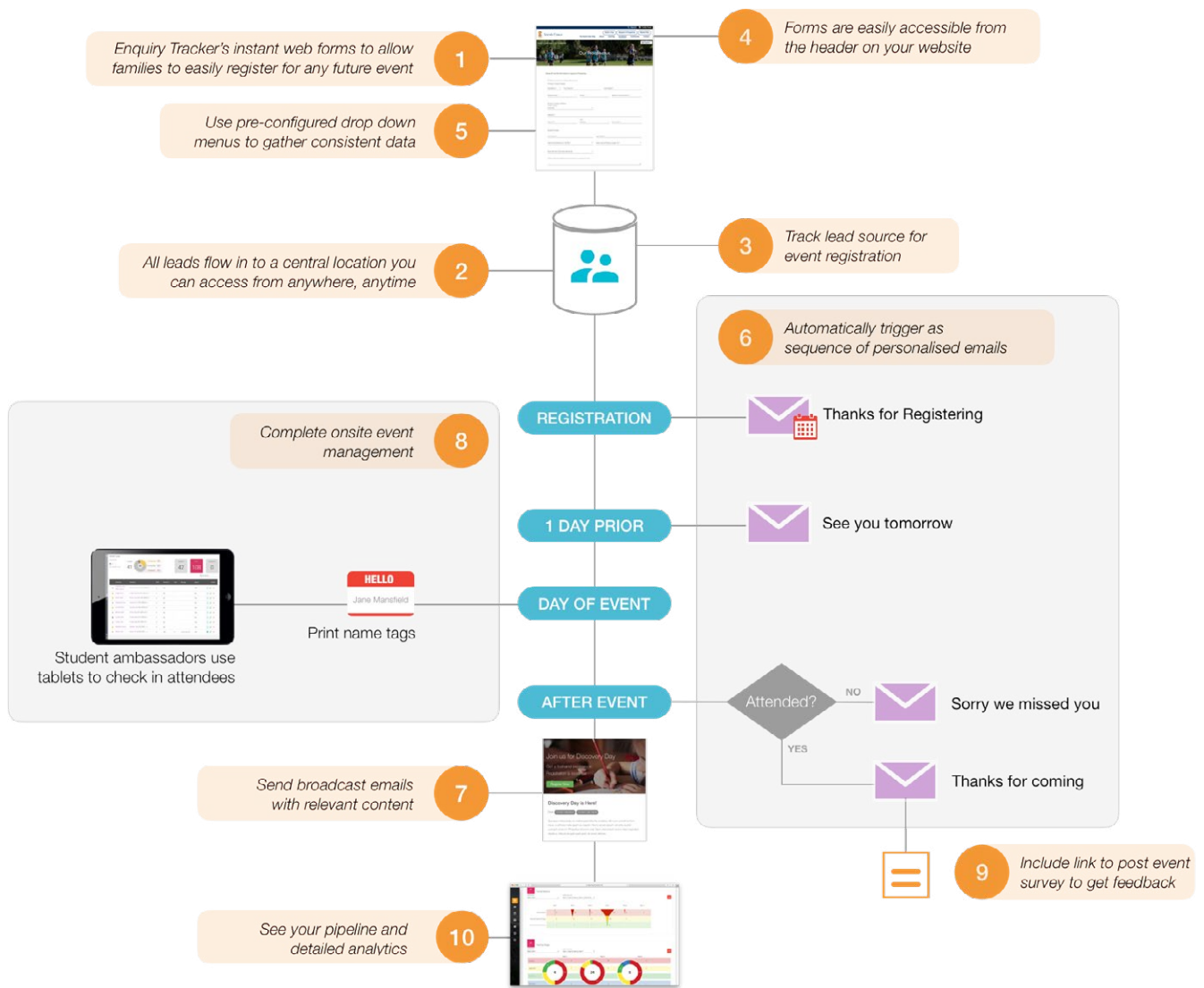
Understanding these questions and providing answers to them was the genesis behind Enquiry Tracker. It is why schools across Australia, New Zealand, and now the USA, are taking advantage of the features to get the critical insights they need and save hours and hours every month.

CONCLUSION

At Enquiry Tracker, we don't just focus on building key visibility into your pipeline, but help you position and differentiate your school in the market place so you can ultimately build raving fans out of your families.

Know that the majority of your leads will come in via your website as event registrations, and our data says that is will be around 94%, so if you make booking a tour easy to find, you can then use Enquiry Tracker to take care of all of the other items.

The flow diagram on the following page follows the process our schools use when registering families for and event. This addresses the 10 point checklist.



How Enquiry Tracker helps address the 10 golden rules - from registration to automated personalized emails and detailed analytics - it is all at your fingertips.

THE 10 GOLDEN RULES CHECKLIST

- Web forms are on our website to capture all inquiries
- All inquiry data is stored in one central repository, ideally an online database
- We track the lead sources for every single inquiry e.g. event registration etc
- Inquiry web forms are easily accessible from every page on our site i.e. in the header
- We use data entry aids e.g. for “Grade Year Level”, “Current School” and “How did you hear about us?” etc. on our web forms to gather consistent data for better reporting
- Every inquiry receives a personalized follow-up email (ideally automated) that includes a call-to-action
- Our inquiries are segmented so we can broadcast emails to our future families which are related to their specific interests and tailored to match the candidates starting year
- Student ambassadors greet families at our events to discover more about future students and we use tablets for a digital check-in process
- We have implemented a process to conduct regular surveys to get feedback and we engage staff and students to analyze results and suggest solutions
- A dashboard has been established to produce charts and reports to see future enrollment trends, demographic data and impact of marketing dollars



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