

Handle leads effectively (part 11)

A summary for quick reference

“Good checklists... are precise. They do not try to spell out everything-- a checklist cannot fly a plane. Instead, they provide reminders of only the most critical and important steps.”

Atul Gawande

“I watch a lot of astronaut movies... mostly Star Wars. And even Han and Chewie use a checklist.”

Jon Stewart

Because I've been talking about handling leads effectively for a long time, here's a single summarizing message with links for the details.

Set up a binder for handling leads — **Can be delegated**

- Buy a bright binder to put next to the phone on your desk or your phone answerer's desk.
- Set aside a consistent weekly time to meet with prospective parents. Put this information in the front, inside cover of your binder.
- Copy the *Inquiry Checklist and Tracking form* and keep them in the binder.
- Buy thank you cards or notecards with your school's logo.

Train yourself or staff

- Set the goals of 1) scheduling an Education Success Consult, 2) then gathering contact information and 3) learning how they heard about you.
- Review how to use the *Inquiry Checklist and Tracking form*.

Follow up

- Send a thank you note along with some helpful information about your school.

Meet with interested parents

- The Education Success Consult is your first chance to find out a family's needs and minister to them.

- Choose in advance what you want to highlight on your school tour and how you can answer questions from the perspective of your school's mission — **Can be delegated to junior high or high school students with training**
- By the end of your first meeting with parents, schedule a classroom visit for the student(s).
- Send another thank you note.

Create a delightful day for the visiting student(s)

- Greet the family out front when they arrive.
- Ask your teacher to plan ways to welcome and include them.
- Send a thank you note from the teacher — **Should be delegated if you are not the teacher**

Call parents a week later

- Offer to answer any questions.
- Ask about their reasons for school choice.

Keep Inquiry Checklist and Tracking forms — **Can be delegated**

- Look through them in the summer for trends on what is working well and what needs improvement.

Delegating:

The items that can be delegated are noted in red.

Binder tab: Ongoing

As a summary you can reference quickly, put this in front of the January tab and in front of "Handle leads effectively, part 1."

School size: All