

From first phone call (or email) to enrollment

An overview of the “Handling leads” series

The goal is to connect interested parents with your principal—twice—so they can hear, in person, whether your school will meet their educational goals. Christian education is a high cost investment in terms of money, time and emotion. It will require high touch (i.e. personal) interactions while parents are making the choice.

A lead (interested parent) tracking binder is located near the phone in the front desk area.

1. Binder includes:
 - Copies of the inquiry tracking forms
 - These “welcoming interested parents” pages (inside front cover)
 - A scheduling page listing times the principal is available for parent consults and with space to note what time the consult is scheduled for. It is vital that the principal sets aside a consistent time which is available for whoever answers the phone to set these appointments. You do not want a delay or hitch in getting parents to your school and meeting with your warm, gracious and helpful principal.
2. Any staff member answering the phone is trained to handle inquiries *so callers do not need to be transferred.*

Your goal for the first call: to schedule an initial educational consult at your school (not over the phone) with the parent(s) and your principal.

1. Follow the script—using your own words—on the inquiry checklist
2. Record the name, address and phone number (to the extent the caller is willing to provide them) on the inquiry tracking form. Additional information is gathered only if the caller is comfortable providing it.
3. Schedule an educational consult with your principal and (preferably) both parents
4. Do not provide tuition and fees information over the phone. Here’s why...
 - No matter what your tuition is some people will see it as too expensive, and so will never come see you—and never learn about your tuition aid options. Some people will see it as too cheap and assume you can’t possibly provide an excellent education for so little, and so will never come see you—and never learn what a great program you offer.
 - Tuition information must be given to parents in the context of also meeting a warm, friendly, helpful education expert (the principal) and learning about your great school.

Move all inquiries through the steps on the bottom half of the inquiry checklist, including the following activities:

1. Ensure the principal has the appointment date on his/her calendar.
2. Mail a handwritten note from the principal on the same day.
 - The note includes a thank you for their interest and a reminder of the educational consult time. If there is anything tricky about finding your school (behind another building, gate codes, etc.) please include that also.
 - Include a one-page flyer about the **benefits** of your school. You have promised “helpful information” so this needs to give tangible information. (For example: “On average students who graduate from our eighth grade test better than 90% of eighth graders.”
 - » Three points would be ideal, and should include **demonstrated** excellence of your education and nurturing Christian virtues. Research shows these are typically the two most important motivators for parents.
 - » Extra credit (50 points): Close-up photos of smiling kids
 - » Extra credit (25 points): A glowing quote from a satisfied parent in a sidebar
 - » Budget idea: This can be a color-copied (for photos), one-sided, letter-sized page. Use bright white paper that is at least 32 lb.
3. First site visit—principal meets with parent(s) for an educational consult.
 - Principal’s goal: Be the educational expert who is there to help parents find the best school for their child—whether or not that is your school. You are an educational expert, not a salesperson.
 - » Listen.
 - » Ask questions that get to the heart of why they are considering your school and what issues they may have had at a prior school.
 - » Provide helpful information about how your school can address those issues.
 - » **Note:** For more information on this see “
 - Give them an application form—not your whole registration packet. If you have a more comprehensive school brochure, give them that as well.
 - Give them tuition information—and tell them your school’s goal is to make a Christian education affordable for any child. Therefore needs-based tuition aid is available and you can give them information if they need it.
 - Schedule a second visit, including their child(ren)
 - » Make this at a time when the child can spend time in the classroom and the teacher will have planned activities in which the child can participate.
 - » Allow time for the parents to talk with the teacher(s) as well
4. Second site visit—child visits in the classroom while parents can observe, talk with the principal and teacher. The goal of this visit is to finalize a school choice by the parents.
 - » If the parents haven’t handed in the application form by the end of the visit, you can ask them if they need another one.
 - Mail handwritten thank you notes from the principal and teacher the same day.

- Call within one week to see if there are any further questions to answer (if the parent seems uninterested, politely learn what their decision points were and which school their child will be attending)

Keep all completed tracking forms in the binder during one school year and summer. This will create a master list of those who have indicated an interest and allow you to track two key things:

1. Where are parents hearing about you (website, community events, personal referrals, etc.)
 - For personal referrals, start a master list of people who are making referrals to you. You will want to thank them more than once. And eventually you will want to start a system of contacting these people and encouraging their future referrals.
2. What percentage of the leads (interested parents) you get from each source enrolls a child
 - You can use this in the future to evaluate what marketing activities to continue or expand and which to drop.

Binder tab: Ongoing (put in your binder in front of the “January” tab)

School size: All

Inquiry checklist

We're so pleased you are interested in our school. Do you have any questions I can answer?

As soon as there is a question you can't answer (and this includes all tuition questions), move to setting up the meeting with your principal.

If the caller asks about tuition: ***Our principal will explain our tuition and fees when you meet with him/her, as well as how we awarded \$_____ in needs-based tuition aid last year.***

We've observed that education is a very individual choice. Our principal, _____, meets with all interested parents so you have a chance to learn whether our school will meet the educational goals you have for your child(ren). He/she is available _____. Does that work for you or is there a time that would be better?

We also have written information you might find helpful and a reminder. I can send it out to you today if I have your...

Name _____ Phone _____

Address _____ Zip _____

How did you hear about our school? (If this is a person, write their name. If you don't know them, ask for contact information so you can **thank them.**) _____

Do you mind telling me the names and grade levels of your children?

Name _____ Grade _____

Name _____ Grade _____

Name _____ Grade _____

Thank you for your interest, we'll get this in the mail to you today.

Date completed	Action checklist
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_____ Education success consult with principal scheduled for _____

Principal is told the scheduled time and it's written in his/her calendar

_____ Appointment confirmation mailed (same day as phone call)

Handwritten note from principal with any direction tips

Includes one-page flyer on key benefits of your school

_____ Education success consult with principal

Parent is given application form (not whole registration packet) and tuition info

School visit for parent and child is scheduled (appropriate teacher is involved)

_____ Handwritten thank you note from principal mailed (same day)

_____ School visit with child, parent(s) and teacher(s)

_____ Handwritten thank you notes from principal and teacher(s) mailed (same day)

_____ Follow-up call (one week later) from principal

Are there any further questions we can answer?

If your child is not coming here, what school? _____

Do you mind telling us what was key in your decision? _____

Application form has been returned by the parents... _____ Yes _____ No