

*“Candidly, my teaching and support teams can be frustrated by this approach, but I view every family as a valued customer that allows us to, at the very least, remain employed, and at the very most, continue to grow the Kingdom of heaven.”*

Matthew Jakobsons, Principal  
Sacramento Adventist Academy

### **Follow up with interested parents**

At Principals' Council you heard from Rick Nelson, Katie Richmond and Matthew Jakobsons (in absentia) about how their schools handle prospective parents.

You asked for the full information from Matthew--here it is. I've added an outline and the benchmarks for the full process so you have all this information in one place.

### **Step 1 -- An interested family contacts the school (Rick Nelson)**

Cynthia Cox, the office manager at Chico Oaks, answers questions but primarily focuses on getting interested parents scheduled for a Education Success Consult with Rick.

She uses the Inquiry Tracking and Checklist form in a binder she keeps on her desk both to a) capture contact information for the family, and b) track the school's follow-up process with that family.

**Benchmark:** 50% of people who contact the school should come for an on-site visit with the principal.

### **Step 2 -- Education Success Consult with the principal (Katie Richmond)**

Katie meets with parents in her office first, working through a process...

- Simple, easy information gathering questions,
- Why parents are shopping for a school and what they are looking for,
- How Foothills can address those concerns,

- Tour of the school and meet the teacher(s),
- Overview of benefits of Adventist education and Foothills approach using the Contract of Excellence, and an
- Offer of an application packet if they are interested.

**Benchmark:** 80% of families who meet with you should enroll.

### **Step 3 -- Follow up with interested families (Matthew Jakobsons)**

Note: This is the question and answer Matthew and I had when jury duty kept him from coming to Principals' Council.

**Question:** How do you get leads (names of interested parents) from Renweb and how do you respond?

- I receive most cold leads through RenWeb. We have an inquiry function on our website that runs through RenWeb. Parents complete the basic form and it is emailed directly to me. From that basic information, I have enough to start a conversation.
- I try to follow up in 24-48 hours. Both are good response times but I love being able to respond the same day (rarely possible) because people are shocked at the speed of service. The, almost live, update/response to their request builds confidence in our customer service and larger program. I typically share tuition information and invite them for a campus tour being sure to say "please suggest a few times and I will make myself available."

**Question:** How do you structure your first meeting with parents?

- I meet with parents and kids and start interviewing them in that first visit. I'll ask more about their connection/how they heard about SAA. In short, I'm trying to casually determine if I believe they'll be a good fit for our program. I keep everything in the first meeting casual because I know they are exploring options just like I am. I try not to spend too much time sitting and instead will walk and talk through questions while we tour the campus.

**Question:** How, and how soon, do you follow up after that meeting?

- I'll typically email parents a day or two after we meet to see if they need anything. I always phrase it that way - "please let me like how I can help make this decision easier for you." The only time I wouldn't do this is if they complete an application (which I would know of because I receive email updates when apps are started and completed).
- I respond quickly because two years ago I lost a non-SDA family/kindergarten student because I assumed they were "in." They'd completed an application and I essentially ignored them for too long (6-8 weeks) by treating them like returning students. My mistake was that I assumed because they had attended our open house and completed an application that they wouldn't have more questions and need support through the enrollment process. I learned from that family that the application/enrollment isn't complete until the first day of school. I'm sure I stress

my office team out because I will repeatedly say, "we won't know if a family is enrolled until the first day of school."

**Question:** You told me you gleaned value insight from Dale Henry's presentation. What was that?

- Candidly, my teaching and support teams can be frustrated by this approach but I view every family as a valued customer that allows us to, at the very least, remain employed, and at the very most, continue to grow the Kingdom of heaven. Our attitude is paying dividends for SAA and families but it has stressed my team by forcing them to rethink our approach and essentially say to families "thank you for allowing us to work in this environment each day."

**Delegating:**

You can delegate setting up appointments and the mechanics of following up (remember, Cynthia addresses envelopes for Rick to send follow-up notes). The rest of handling interested parents needs to be done by you.

**Credits:**

Thank you to Rick Nelson, Katie Richmond and Matthew Jakobsons for sharing their experiences and what is working for them.

**Binder tab:**

Add this to the front of your binder, at the end of the series "Handle leads effectively," just behind "Part 11"

**School size:** All

**Marketing process step:**

- 1) Who are we?
- 2) What do families want?
- 3) What needs to change?
- 4) How do we tell our community?
- 5) How do we track results?