

Handle leads effectively (part 5)

Using the *Inquiry Checklist and Tracking* form for same day follow up

“Having these forms in a binder on my desk is very helpful. When inquiry calls come in I grab the binder and converse with the potential parents through the form, which helps me organize my thoughts as I gather their information. Then after the call, the form serves as a great way to note follow up and stay in touch with parents.”

Cynthia Cox, Administrative Assistant
Chico Oaks Adventist School

So you (or your staff) have used the top half of the *Inquiry* form to gather information from interested parents and schedule a meeting with you. The bottom half of that form walks you through keeping in touch with them.

Here's what should happen **that same day**.

Date completed	Action checklist
_____	Education Success Consult with principal scheduled for _____. <input type="checkbox"/> Principal is told the scheduled time and it's written in his/her calendar.

- "Date completed" indicates when the phone call or email came in and scheduling happened
- "scheduled for" indicates the time parents will be meeting with the principal
- "Principal is told..." is a reminder to put that meeting time in the principal's calendar and ensure he/she remembers it

_____	Appointment confirmation is mailed (same day as phone call)
	<input type="checkbox"/> Handwritten note from principal with any direction tips <input type="checkbox"/> Includes one-page flyer on key benefits of your school

- The "handwritten note" can be on school letterhead, on a notecard that has your school's name and logo on the front (also very useful for writing thank you notes throughout the year), or on a plain notecard. The point is: It should be personal.
 - » If there is not enough time for a note to go through snail mail (and you have gotten an email address) you can send an email. (But who doesn't find a

personal, hand-written note in their mailbox delightful? And you are aiming to delight parents, right?)

- » **Content:** Dear _____, I look forward to seeing you at *****time***** on *****date***** and talking about your goals for your child(ren)'s education. Our school's address is: _____ Cordially, *****signature*****
- » If you talked with the parents personally and some specific issues came up, please personal this content by mentioning that you will be addressing those topics further at your meeting.
- » The "direction tips" are only if your school's location has a quirk that makes it hard to find.
- The one-page flyer can be a small brochure, if your school has one that is up-to-date. If not, it is a one-page list of your key benefits printed onto your letterhead. Here are some ideas you can copy and/or adapt.
 - » **Adventists know education.** Your child will benefit from the depth of experience that Adventists have in providing excellent education. We've been operating schools in North America since 1872, growing to more than 800 schools ranging from preschools through full universities. *[Add the length of time your school has been open--especially if it's longer than other private schools in town.]*
 - » **Adventists excel at education.** You can be confident your child will receive the foundation needed to achieve his or her dreams. *[It would be best to use the great news from your school's standardized test scores here. If you can't then...]* 85% of students who attend Adventist schools go on to college (compared to 66% of public school students). And more than 80% complete their college degrees (compared to 14% from public schools).
 - » **Adventists educate the whole child.** Your child will not only benefit from excellent academics but from a well-rounded approach to develop healthy bodies, positive social interactions and thriving spiritual lives. *[Again, it would be best to list your school's activities or goals for accomplishing this. If not, then...]* The benefits of the Adventist approach to healthy living has been documented in increased longevity as noted in "National Geographic" magazine, reports from the U.S. National Institutes of Health and in the book "Blue Zones."
 - » **Adventists educate for eternity.** As Protestant Christians, we believe a personal relationship with God is the key to a happy, healthy life here on earth and for eternity. While this is harder to quantify, it is the focus of everything we do, the reason we exist. *[Again, add a condensed list of your school's efforts in spiritual education and community service.]*
- You will want to add welcoming and concluding paragraphs that are specific to your school.
- For A+ work: Add close-up, smiling photos of your students.

Binder tab:

Put this in front of the January tab and behind "Handle leads effectively, part 4."

School size: All