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THE

**LEAD  
TO  
WAITLIST**

FRAMEWORK

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Presented by

**EnrollmentGenius**

[www.enrollmentgenius.com](http://www.enrollmentgenius.com)

# CONTENTS

## **Section 1: Lead Generation**

This section includes all the high-level fundamentals you need to build and grow your school. Even schools that have been operating for years find these strategies completely revolutionize their businesses.

## **Section 2: Nurturing Leads**

Want to know how to get new customers? In this section, you'll learn the five frameworks we use to profitably acquire customers for other schools and for our own business. These are universal frameworks, and we'll show you exactly how to implement them step-by-step.

## **Section 3: Sales (Enrolling Students)**

Acquiring leads doesn't mean much if you can't convert them into enrolled students. This is the biggest section because it's where most schools need serious help and it's what we're known for. We've helped schools across the country fix their sales problems and we can help you, too.

You're about to discover the right way to run the entire sales process:

- Prescreening
- Pre-Tour
- Presentation
- Post-Tour
- Post-Shadow Visit
- Close

## **Section 4: Delivering**

Delivering on a world-class product takes work. As the landscape of education and the expectations from parents continue to change rapidly, the days of "this is the way we've always done it" simply aren't good enough anymore. We'll teach you the three core tenets you have to master to deliver a world-class product. Once you do, your current customers will start telling their friends & neighbors all about it.

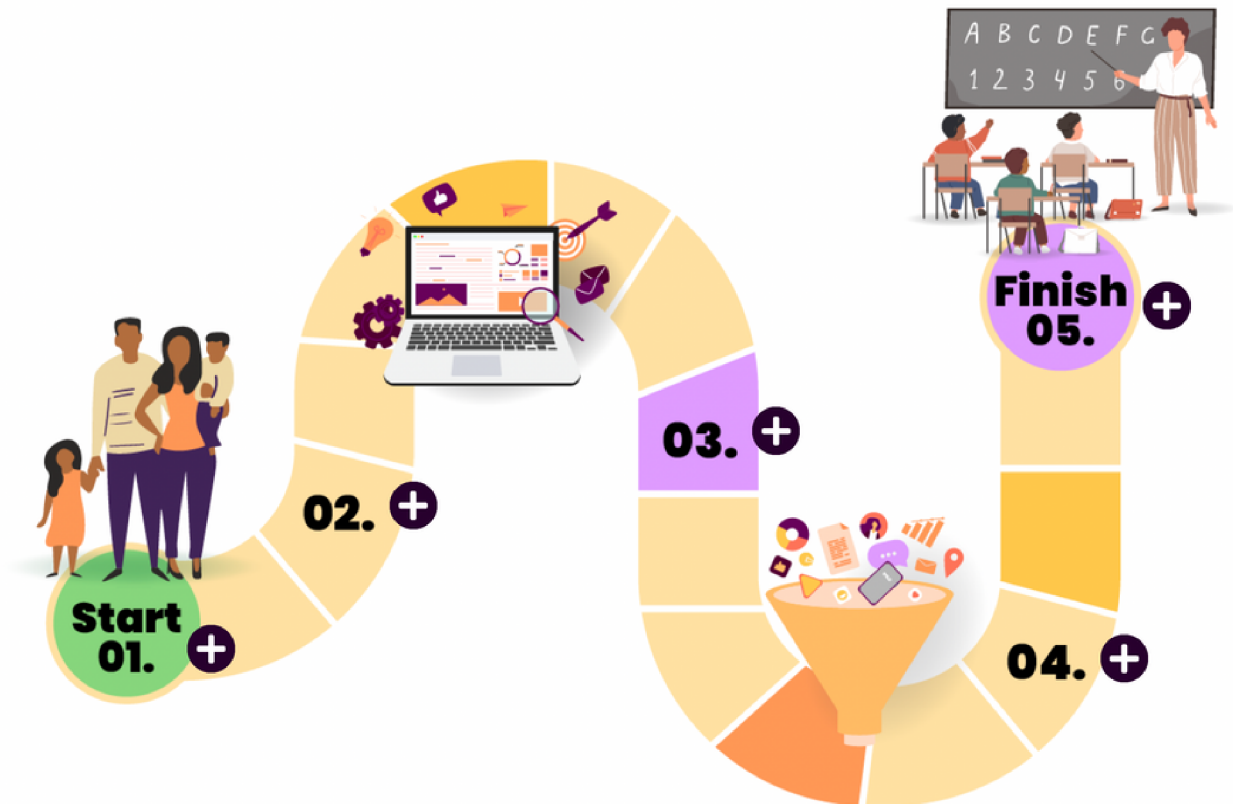
## **Section 5: Reselling (Re-Enrollment)**

When a family enrolls, we expect it to be a multi-year commitment. Effective re-enrollment strategies require a complete reimaging of the fulfillment culture at your school. Enrollment is NOT a single point in the recruiting timeline, but instead, every single interaction a student and their family has with your product across the entire lifecycle.

## SECTION 1

# LEAD GENERATION

Your visibility online is your digital storefront. **The foundation for all school growth starts with a steady flow of prospective families walking through the door.** In order to grow, you have to get this part right FIRST.



**01.** The Smith family is searching online for a private school for their two young children. **Your school shows up at the top of Google search results.**

**02.** When the Smith family visits your school's website, they follow a user experience workflow designed to guide them to submit a tour request. **You've captured the Smiths' encrypted identifier data and can now remarket to them in the form of targeted ads and remarketing funnels.**

**03.** As the Smith family is researching your competitors, **they continue to get served ads for your school through a remarketing funnel on apps like Facebook and YouTube.**

**04.** Based on the data you capture about the Smith family (and the other families who visit your website), you build targeted audiences to deliver ads to people most likely to be interested in your school.

**05.** When the Smith family returns to your website to submit a tour request, **your admissions team uses the EnrollmentGenius admissions workflow** to nurture the contact and seamlessly guide the family through the enrollment process.

# LEAD GENERATION

EnrollmentGenius has generated over \$75,000,000 in revenue opportunities for schools across the country by perfecting the pieces of the lead generation puzzle that turn your ads into conversion faucets. These are the six pieces you need to consider when building out a lead generation strategy.

## FUNNEL OPTIMIZATION

Utilizing psychological frameworks specific to parents with school-aged kids, you need to map an online journey that converts website visitors into tour requests.

## COPYWRITING

Applying insights from search intelligence and existing family research, write meaningful content that educates buyers and drives tour request conversions.

## GOOGLE DISPLAY NETWORK

Leverage the power of the Google Display Network to maximize your PPC ad spend. Select a strategy engineered exclusively for private schools.

## GRAPHIC DESIGN

Hire a designer with experience designing content for PK-12 schools. Their experience will offer invaluable insight to help bring your campus to life online.

## META PLATFORM

Reach new and returning prospective families with creative campaigns and re-marketing ad sets that encourage them to take action.

## VIDEOGRAPHY

Hire an Adobe Premiere Pro experts who can storyboard, shoot, edit and produce dynamic video content for your website and marketing campaigns.

## SECTION 2

# NURTURING LEADS

In order to convert prospective families into enrolled students, you need to develop, build, and nurture trusting relationships through consistent and personalized marketing efforts.

**Over time, you can guide your prospective families through the various stages of a journey that ultimately leads to a tour** – but lead nurturing requires a thorough understanding of your audience and a distinct strategy built on best practices and innovative techniques.

### THE FIVE STEPS OF LEAD NURTURING

#### 01 **Establish Lead Nurturing Goals & Labels**

Your team should develop a lead disposition strategy that makes it easy to identify where each prospective lead is throughout the lead nurture lifecycle.

#### 02 **Segment Your Leads**

Based on data collected during the tour form submission or initial contact stage, leads should be segmented out based on groupings (IE. elementary, middle, high school)

#### 03 **Create Lead Profiles**

Oftentimes we learn valuable pieces of information from families during our initial phone call. Are their children interested in a certain subject area, sports, or the Arts, etc?

#### 04 **Develop Personalized Content**

Canned, generic emails are not the best way to nurture leads. Parents want to see personalized, thoughtful content that speaks to the needs of their individual child.

#### 05 **Create Lead Nurturing Campaigns**

Prospective families should be enrolled in lead nurturing campaigns that are reflective of their unique lead profiles and segments.

# NURTURING LEADS

Here are four things you can implement **immediately** that will improve your lead to phone call conversion rate.



## **Web Inquiry**

70% of prospective families submit a tour request through the schools' website. Tour requests include the prospective parents first & last name, an email address, phone number, the grade level grouping of their child, the campus they're interested in and the school year in which they're interested in enrolling.



## **Auto Redirect | What To Expect Next**

When a tour request is submitted, prospective families should be auto redirected to a webpage that describes what they can expect next, including receiving an email in their inbox and a phone call from the admissions coordinator.



## **Auto Thank You Email**

After submitting a tour request, prospective families receive a personalized email thanking them for their inquiry and reinforcing the core values and mission of receiving an education from your school.



## **Call Immediately**

New leads should be called immediately upon receipt whenever possible. If scheduling does not permit an immediate phone call, leads should be called no later than end of business of they day they were received. If leads are received on the weekend, they should be called immediately on Monday morning.

## SECTION 3

# SELLING

Before we get into structuring a great tour, here are a few "experience" non-negotiables your school has to set in order to meet prospective families' most basic expectations. This is the bare minimum necessary for most families to consider your school a worthy contender.



### **STREAMLINED**

Families expect an experience that's convenient and easy to navigate. Every aspect of our admissions and enrollment process has been thought through, from inquiry through billing, to ensure that every step is clear and simple.



### **PREMIUM QUALITY**

A prospective families' experience with our brand should reflect the price point. If someone pays a significant sum of money (i.e., tuition) they expect the CX to be flawless and feel premium. Since public schools offer a free alternative to private and independent schools, our school will always be considered a premium option.



### **MOBILE-FIRST**

Today, most of our first experiences engaging with any organization (whether it's a brand, service, or school) happen online, and often they happen via mobile. Families expect to be able to get all the information they need about our school (and even complete the entire enrollment process) via their mobile devices.



### **PERSONALIZED**

Consumers purchase more from brands that personalize than those that don't. The same holds true when selecting a school for their children because families want to feel recognized and special — and they want to know their child will be seen and known.

# SELLING

There are five core tenets to the new enrollment sales cycle. We'll go over them in more detail on the following pages.

## **PRESCREENING**

During the prescreening process, your initial phone call should cover on the following: Discovery Questions > Qualifying the Family > Highlighting Core Philosophy> Scheduling a Tour

## **PRE-TOUR**

Prior to the tour, your Principal or admin team should review report cards, transcripts, and any IEPs or behavior plans to determine if student(s) are academically eligible.

## **PRESENTATION**

Greeting > Building Rapport > School History > Culture > Curriculum > Operations > Safety > Programs > Pricing > Enrollment Process > Asking Tie Down Questions > Uncovering Objections > Creating Urgency > Providing Take Home Information

## **POST-TOUR**

You should always send a thank you email that includes a link to schedule a shadow visit and a link to your schools enrollment guide. After a shadow day has been scheduled, notify staff and ask Principal/Teachers to assign a student ambassador.

## **POST-SHADOW DAY & CLOSE**

Meet with family and ask students about their experience. Recap next steps. Gather feedback from teachers and determine final acceptance, and then send an acceptance letter with instructions on how to complete the enrollment packet.



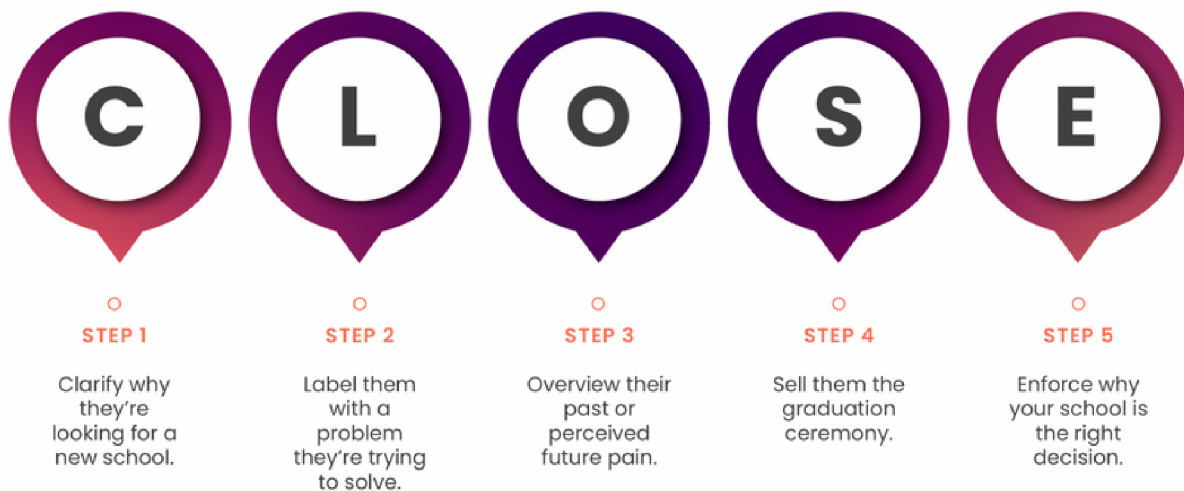
## SECTION 3

# SELLING

It can be hard for us to look at our school as a product that needs to be sold. The reality is that knowing best practices in sales psychology and hiring the right people to sell is a critical part of enrolling prospective families.

### THE CLOSE FORMULA

This is the simple formula we use to write any kind of sales script. The acronym **CLOSE** helps remind us of all the elements we need to include in a complete pitch.



Again, as educators, it can feel incredibly awkward to think about our school as a product that needs to be sold.

But truth be told, when a family is considering a new school, there are quite literally dozens of options for them to choose from. Once you embrace the mentality that you have to be able to effectively communicate why your school is the best option, and that there are simple, proven psychological frameworks you can follow to make this process easier, you'll instantly start converting more tours into enrolled students.

# SELLING

## C is for CLARIFY

The first thing you want to do is clarify why they walked in the door that day. You're starting to **establish a gap between what they're currently receiving at their current school, and what they will receive when they attend yours**. You just ask questions until you find out the problem they're struggling with. If you ask, "Why did you come in today?" they might say, "Our daughter isn't being challenged in the classroom." That's good. It's what you want to hear. If they say something like, "Well, I saw an ad and we decided to come check you guys out", then you need to dig a little deeper until you get to their pain point. So just ask, "Why did you decide to come check us out?" They might still be focused on the ad and say, "We just want to see what else is out there." Keep asking why until they get to a pain point.

## L is for LABEL

The next step is to **label their problem**. You want to state it out loud. "So your goal is to find an environment where your daughter can be challenged in the classroom?" Just get them to acknowledge that you have understood them correctly.

## O is for OVERVIEW

Next you're going to **ask a lot more questions to get a good overview of their past experiences**. Ask them what they feel they're missing at their current school, and what they like the most.

Once you've uncovered all their issues and figured out all of the things they do like about their current school, you have absolutely all the information you need to sell them.

# SELLING

## **S is for SELL the Graduation Ceremony**

There's an old saying in sales, **sell the vacation, not the plane ride**. When people are planning a trip to Hawaii, for example, you don't want to make them think about the 12 hours they'll spend in a cramped airplane. Instead, you want them to imagine relaxing in the sun on a beautiful beach. Sell them on the vision of what it'll be like for their daughter to be happy, engaged and challenged in the classroom.

The next piece of selling the vacation is to **affirm the things they liked about anything that's similar to your school and the things that were valuable to them. Then identify the key points of difference between their current school and your school.**

## **E is for ENFORCE**

The last thing left to include in your sales present is to **reinforce their decision**. It's when you begin the "wow-ing" process and fulfillment. **Do this step ASAP!** Don't let them leave before you give them a t-shirt or piece of swag. Give it to them before they walk out the door. Put a nice handwritten card in the mail the very next day. Follow up with a phone call to ask if they have any additional questions and let them know how wonderful it was to meet them and their family. This makes them feel like they'd be making a good decision to enroll and they're more likely to stay for a long time (and more likely to refer their friends).

You don't have to have a script that you read word-for-word. Just knowing the CLOSE formula and following it during your sales conversations will make a huge difference in your close rates.

## SECTION 4

# DELIVERING ON WHAT YOU'VE SOLD

Delivering on a world-class product takes work. As the landscape of education and the expectations from parents continue to change rapidly, the days of “this is the way we’ve always done it” simply aren’t good enough anymore. These are the three core tenets you have to master to deliver a world-class product. Once you do, your current customers will start telling their friends & neighbors all about it.

### CUSTOMER SERVICE

A family's experience with your school should always reflect the price point. Parents pay a significant amount to send their kids to our schools, and they expect their experience to be flawless and feel premium. Master the art of world-class customer service and your families will keep coming back (and referring friends!)

### LEARNING OUTCOMES

Schools are all about outcomes. Parents (your customers) are happy when their children are engaged, enjoying the learning experience, and making positive progress. Whether it be academically, socially or emotionally, being outcome driven and communicative about results will ensure your customers keep coming back year after year.

### PROGRAMS & CULTURE

From academic learning tracks, school-wide events, extracurriculars and clubs, these programs are essential in engaging students and their families. Not only do they provide a sense of community for everyone at the school, but these opportunities provide an invaluable experience-culture that becomes the foundation for the value of your product.

## SECTION 5

# RESELLING (RE-ENROLLMENT)

When a family enrolls, we expect it to be a multi-year commitment. Effective re-enrollment strategies require a complete reimagining of the fulfillment culture at your school. Enrollment is NOT a single point in the recruiting timeline, but instead, every single interaction a student and their family has with your product across the entire lifecycle.

## ENROLLMENT IS EVERY INTERACTION ACROSS A STUDENT'S LIFECYCLE



## A SIGNED CONTRACT ISN'T THE FINISH LINE

Our efforts to protect and grow enrollment begin with our very first interaction with a family. And then they should never stop.

“Enrollment” is an always-on effort, with each and every interaction having the possibility to make or break a family’s experience.

# RESELLING (RE-ENROLLMENT)

Here are three things you can implement immediately to help drive re-enrollment numbers and increase student retention.

**01**

## **Survey Families Often**

Throughout the school year, your team should aim to regularly collect feedback from families regarding their customer experience. This way, you can keep your finger on the pulse regarding potential deficits before they create re-enrollment fallout. Great tools to start implementing surveys include SurveyMonkey, TypeForm, and ConstantContact!

**02**

## **Run a multi-phase campaign**

Sending out a re-enrollment letter and forms isn't enough. Your team should develop a strategic, multi-phase re-enrollment campaign that includes mixed media content like graphics, videos, and posters throughout your campus. Your team should make it a point to connect with every single family who hasn't turned in re-enrollment paperwork before the open enrollment deadline approaches.

## **Communicate Re-Enrollment Numbers**

**03**

There are two things that motivate people to take action: expressed urgency and fear of loss. By communicating with your families about your current capacity and re-enrollment numbers with direct data (ex. We have 36 seats in 1st grade and 27 of them are currently reserved), you'll motivate your families to act sooner than later. Regular communication about current capacity posted on Facebook, ClassDojo, or your SIS are a great way create urgency.

# **FREEBIES |** The Internal LTW

Now you're familiar with the 5 External Core Functions of going from Lead to Waitlist: lead generation, lead nurture, sales, fulfillment, and retention. Right now, I want to discuss the *internal* core functions for your school. The beautiful thing is they run in parallel, so it's easy to remember and implement them.

## **Lead Generation | Application Generation**

You need to know how to generate applications so you develop a constant flow of new employees. You don't want a lot of turnover in your school, but you do want to grow. And you need new employees to serve a growing student body. It's also a good idea to have a line of people ready, willing, and able to step into any position you have open. If you don't have a system in place to generate applications, it's a good idea to get one set up as soon as possible.

## **Lead Nurture | Nurture Applications**

Once you've generated employment applications, you need to nurture them. In other words, you want to have a process to take people from the application through to the interview.

## **Sales | Interview**

You'll notice that an interview and a sale are more or less the same thing. In both situations we are seeing if it's a good fit. They are selling us as much as we are selling them. You just need to know which questions to ask in what order to elicit the desired result.

## **Fulfillment | Onboarding & Training**

Now, fulfillment is interesting, because normally you fulfill after you sell. Within a school, though, fulfillment is your employee onboarding and training. Your job is to help a new hire integrate into their new job and the overall culture of your school. Do this right and you'll save time and money on turnover.

## **Retention & Ascension | Retention & Ascension**

Internal retention just means hanging on to your employees. Can you make sure you hire the right people and keep them over the long term? To do that you need great processes, management, and communication cycles. Ascension in this case means where are they going to go in your business model? What's the next career step for them? Are they going into administration? Will they be a Principal someday? If you don't provide an upward path for them, you're probably going to lose them at some point in the future. Ascend the ones who show the most promise.

# **FREEBIES |** The 4 Marketing Groups

There are 2 sides to every school: the external or customer-facing side and the internal or employee-facing side. Most school administrators think that marketing is just an activity with the single purpose of generating more students. But at EnrollmentGenius, we teach that there are actually 4 groups of people you need to be marketing to. And if you leave any of them out, you're leaving opportunity on the table. A LOT OF OPPORTUNITY!

## **Market To Your New AND Existing Customers**

Marketing to new customers is pretty obvious, right? If you're not bringing in new people, you're toast. But are you also marketing to your existing customers? Your current members are your recurring revenue. You want to be marketing your school's culture and getting your families to identify themselves with your school because of that culture you've created. Maybe you're a Montessori School or you specialize in STEM programs, character development, or world-class athletics. It doesn't matter what the culture is, only that you build one and keep people excited to be a part of it. Marketing your culture keeps your churn rate low, so people stay with you longer.

## **Market To Your New AND Existing Employees**

Again, it might be obvious that you need to be marketing to attract new employees. After all, if you're going to scale and grow your school, you've got to keep highly qualified teachers working for you. But it might not be so obvious that you want to market to your existing employees.

You need to continuously sell your existing employees on why your school is great and why the vision that you have is so compelling. That consistent message will breed an amazing school culture. You can also run internal challenges for your team. Customer service challenges are common. For example, at EnrollmentGenius, we strive for a response time of less than 5 minutes during normal business hours. But that doesn't mean we can't do better. An internal challenge might be to get that response time under 3 minutes during a certain month. Then we can offer prizes for the person with the fastest response time. Now, we don't expect your teachers to respond to parent emails within 5 minutes, however, setting a weekly communication goal of 1 or 2 contacts per week is easily attainable.

Internal challenges keep people engaged, and that's a huge opportunity for your company. Don't just offer incentives for your teachers. Find ways to keep your other employees excited about coming to work, too.



# What's Next?

I hope you've enjoyed this e-book. My goal was to give you lots of value without taking a lot of your time. Sometimes all you need is a quick picture to explain a great deal of information. If you've enjoyed this book, here are some more resources you might want to take a look at.

## **Podcast**

Check out [EnrollmentGeniusPodcast.com](http://EnrollmentGeniusPodcast.com) for more content on growing and scaling your school. *Coming soon!*

## **School Administrators Group**

You can access our free group at [Facebook.com/EnrollmentGeniusGroup](https://www.facebook.com/EnrollmentGeniusGroup). You can ask questions and get answers from me and my team on any growth issue you're experiencing. *Coming soon!*

## **Website**

Go to [EnrollmentGenius.com](http://EnrollmentGenius.com) where you can see other happy school administrators sharing their experience with the EnrollmentGenius program. They'll tell you in their own words what we've done to get them to a waitlist quickly by using the concepts I've described in this e-book.

I hope to meet you in the real world sometime soon.

To your success!  
Peyton Flanders