



# UPWARD:

## A STEP-BY-STEP GUIDE

TO REFRESHING YOUR  
ENROLLMENT JOURNEY FOR YOUR  
MOST SUCCESSFUL YEAR YET






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Today, parents are feeling apprehensive about learning options for the year ahead. Many also struggle to choose a new school without the benefit of in-person tours or face-to-face conversations. This mass uncertainty, combined with the fact that many families are facing unexpected economic hardships, means competition for new families and attrition rates both may be higher than usual.



Today, parents are feeling apprehensive about choosing a school without in-person tours or face-to-face conversations. This mass uncertainty, combined with the fact that many families are facing unexpected economic hardships in the wake of the pandemic, means attrition rates may be higher than usual.

All of this is to say: There's never been a better time to revisit your admissions process, examining it from top to bottom to identify opportunities for improvement and areas for growth. Today, it's vital you make the most of every prospect in your funnel, optimize conversions, and increase student retention.

Of course, that's all easier said than done. If revamping your entire admissions funnel sounds overwhelming, then you're not alone.

**In this resource, we're breaking down the process into manageable stages, and providing tips, best practices, and a few useful worksheets to help you on your path.**



# Inquiries

An **inquiry** is when a prospective family submits their contact information to a school, usually by filling out a contact form on your school's website. This demonstrates a family is interested in learning more about whether or not your school is the right fit for their child.

Think the inquiry is dead? Think again. Over the past few years, we've seen an increase in "stealth applicants" — applicants who never completed an inquiry form before applying to a school. But there's a lot to be gained by engaging with families earlier in the admissions funnel.

In other words, driving more inquiries can significantly benefit your admissions efforts, but you have to give them a reason to reach out.

That's why, before you can move forward with refreshing your admissions process, you need to answer one simple but essential question.

## → What attracts families to your school?

This is the critical, foundational concept around which you'll center your admissions gameplan. Because winning over prospective students and their families begins long before the first campus visit, and even before the first phone call.

Knowing what drives inquiries (that is, *why* people take the first step toward sending their child to your institution), is essential for creating strategies that successfully move prospects down the admissions funnel.



## There's a science to driving inquiries, and it involves four crucial elements:



### Messaging

Once you've identified what attracts families to your school, be sure you're communicating your unique value proposition clearly across your website and in all marketing platforms and materials.



### Content

What information and resources are you providing that make families want to engage? How are you proving to prospects, through the content published on your website, that they can trust you to deliver on the value you've promised?



### Calls-to-action (CTAs)

Don't expect everyone who views your website to know the next step — lead them to it and instruct them on what to do. A clear call-to-action, such as "Sign up for a free webinar" or "Book a guided virtual tour," provides the gentle nudge prospects need.



### Forms

Do you make it easy for interested families to take the next step? Inquiry forms should be straightforward, uncomplicated, and only include fields that will give you necessary and/or actionable information. For example, a name and address field are necessary because you'll need that information to reach out.

Actionable fields are those that allow you to personalize your outreach and follow-up communications, like a prospective student's interests and extracurricular activities. For example, if a parent selects "soccer" from the list of activities, you could use this to trigger an automated email introduction from your soccer coach. You can also use this information to personalize campus tours to their exact interests.

If the questions you're asking don't fall into one of these two categories, consider eliminating them. Remember, you want to be selective about the questions you ask, and thoughtful about the way in which you do it, to ensure an easy and smooth experience for your families.

Getting clear on what attracts people to your school, and then communicating this value, won't only help you attract *more* inquiries — it'll help you attract the *right* inquiries. That is, the families who share your institution's values and are more likely to complete the admissions process.



# Game Plan for Attracting Students

Select three inquiry-driving efforts you'll use to generate interest over the next school year:

- ☐ Host an informational webinar
- ☐ Host a virtual open house
- ☐ Host a student panel
- ☐ Host a virtual campus tour
- ☐ Offer 1:1 calls with student ambassadors
- ☐ Update website messaging to emphasize competitive strengths

**How will you execute on these three efforts?**

**Inquiry-driving effort #1:** \_\_\_\_\_

I will accomplish this by: \_\_\_\_\_

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**Inquiry-driving effort #2:** \_\_\_\_\_

I will accomplish this by: \_\_\_\_\_

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**Inquiry-driving effort #3:** \_\_\_\_\_

I will accomplish this by: \_\_\_\_\_

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# Applications

**Pro Tip:** Does anything in your application process still require submitting forms via snail mail, or in-person interaction? If so, change these processes immediately. In the age of COVID-19, and even after, it's critical you always have the option to do things virtually.

As an admissions and enrollment professional, you're busy. So much of your institutions' continued success rests on your (highly capable, yet often overburdened) shoulders. But do you know who else is super busy?

## → Your prospective students' parents.

Like you, they're often running a million miles per hour, working, taking care of their families, striving to keep their loved ones (and themselves) healthy and sane.

That's why you need to ensure your process is as easy as possible.

Of course, by "easy," we don't mean you should become less selective — it's good to have a rigorous process. But you need to ensure your process isn't outdated, cumbersome, and unnecessarily complex. If it's too tedious, you risk driving away high-quality candidates who are simply too busy to navigate complicated paperwork and archaic technology.



**To help, here is a simple step-by-step worksheet for revamping your application process:**



# Application Process Revamp Roadmap

## 1 Map your application process from beginning to end.

- What's the first thing a parent or guardian has to do?
- What's the final step before you begin the next phase of the admissions process?
- Approximately how long does it take the average family to move from the first step to the last?

## 2 Carefully examine each step to identify...

- Where it's too confusing
- Where it requires snail mail
- Where it asks for information that's outdated and/or irrelevant

## 3 Ask yourself, "Is there anything I'm doing only because that's the way it's always been done?"

- What's slowing you down?
- What steps rely on outdated technology or—worse—paper forms?
- What steps or elements of the process would seem nonsensical to someone outside your school?

## 4 Evaluate your application fee.

- Is your fee preventing candidates from applying?
- Do you have an easy way to waive fees if desired?
- Will adding or increasing a fee ensure more committed applicants?
- Is there an easier way to collect fees?
- Is there an easier way to process fees internally?

## 5 Set your deadlines.

- When are your deadlines for interviews, applications, and financial aid?
- When will you release decisions?
- Do your application deadline and decision release dates align with peer/competitor schools?
- Do your dates fall on a holiday or any other time that would make completing and or reviewing applications difficult?
- Are your deadlines clearly communicated (and listed accurately) on all channels and materials?





## 6 Review your application surveys and questionnaires.

- Can you simplify your questions?
- Can you reduce the number of questions?
- Is there an easier way for parents to complete and submit Q&As?
- Do the current questions help you glean enough information about applicants?

## 7 Refine your application and candidate review procedures.

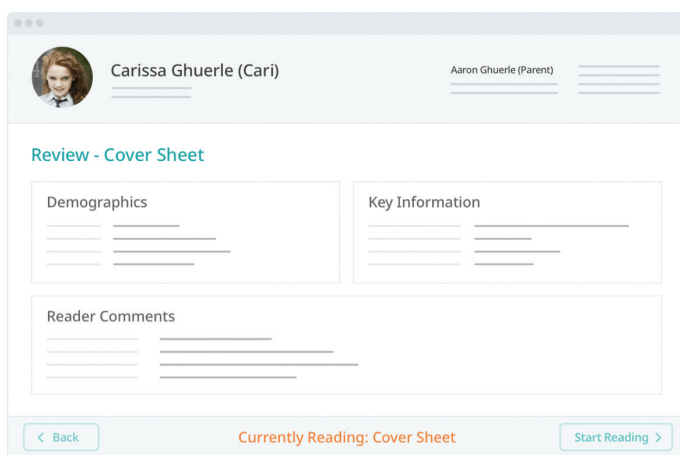
- How are you reviewing student files?
- Are you taking a data-driven approach to comparing candidates?
- Does your applicant scoring rubric reflect the values of your school?
- Does your committee feel overburdened by the review process?
- Can your committee easily review files electronically from anywhere?
- Is there a way you can centralize your process?
- Is everyone on the committee essential to the process?
- Have you taken steps to eliminate implicit bias and encourage diversity throughout your process?
- Will your committee and review processes work even if you can't be on campus this fall/winter?

**Pro Tip:** Prepare a separate list of questions for parents, and age-appropriate lists for students at different levels. **[Learn more about interview questions here.](#)**



In the wake of the pandemic, many institutions have adapted to online-only processes. But in the rush to take things virtual, many schools cobbled together procedures that are neither efficient nor streamlined. (After all, no one knew how long these stop-gaps would need to last.) Now that remote work is becoming more of a norm, it's essential you centralize your efforts. Emailing multiple files and using disparate systems can often make everything harder than necessary.

An **enrollment management solution like SchoolAdmin** will help you create flexible workflows for your team while providing a user-friendly experience for prospective families, too.



The screenshot shows a web application interface for a 'Review - Cover Sheet'. At the top, there's a header with a profile picture of a woman, the name 'Carissa Ghuerle (Cari)', and a login field for 'Aaron Ghuerle (Parent)'. Below the header, the title 'Review - Cover Sheet' is displayed. The form is divided into three main sections: 'Demographics' with four input fields, 'Key Information' with four input fields, and 'Reader Comments' with a larger text area. At the bottom, there are three buttons: '< Back', 'Currently Reading: Cover Sheet' (highlighted in orange), and 'Start Reading >'. A purple arrow points from the text 'An enrollment management solution like SchoolAdmin' to the 'Review - Cover Sheet' section of the form.

SchoolAdmin makes it easy for your families and recommenders to complete fully online forms (downloadable PDFs are not a great experience for your families), plus upload documents like transcripts directly to their applications.

The right solution can also help keep your entire team on the same page—even when you're working from different locations. You'll know who has spoken with the candidate and when, so no families fall through the cracks throughout the application process. And when records are 100% virtual, you won't need to worry about missing documents or misplaced files.





### PART 3:

# Interviews

You can review transcripts, test scores, essays, and surveys, but nothing will tell you quite as much about a prospective student as your interview. This step can be the most valuable of the entire admissions process — but only if you're using it to its full advantage.

As you re-evaluate your admissions process, it's also an excellent time to inspect your interview procedure. Are you doing everything possible to get to know your prospective students? Is your current interview process giving you all the information you need? If not, now is a great time to bring in some new questions.



**To help, here is a printable worksheet for your admissions interviews, including our top recommended questions:**



# Admissions Interview Questions for Students

We've included some of our favorites to get you started. Add your own questions to customize the list for your school.

- 1 What are your three favorite things about yourself?
- 2 What are three things you'd like to improve upon?
- 3 What do you do when you're having a hard time in a subject?
- 4 How do you like to spend your free time?
- 5 What would you like to accomplish during your time in school?
- 6 What made you choose to apply to this school?
- 7 What other schools are you considering?
- 8 If you could change anything about your current school, what would it be?
- 9 What is one achievement that makes you proud?
- 10 Who is someone you admire or look up to, and why?
- 11 What would you do if someone asked to copy your homework?
- 12 What questions do you have for us?
- 13 \_\_\_\_\_
- 14 \_\_\_\_\_
- 15 \_\_\_\_\_
- 16 \_\_\_\_\_
- 17 \_\_\_\_\_
- 18 \_\_\_\_\_
- 19 \_\_\_\_\_
- 20 \_\_\_\_\_

WORKSHEET



# Admissions Interview Questions for Parents

We've included some of our favorites to get you started. Add your own questions to customize the list for your school.

- 1 Tell me a bit about your family.
- 2 Which three words best describe your child?
- 3 What are your child's favorite activities?
- 4 What does your family do together on weekends?
- 5 Tell us about a skill your son/daughter worked hard to master and how that process went.
- 6 What made you choose to apply to this school?
- 7 What other schools are you considering?
- 8 What are your plans for the remainder of your child's K-12 education?
- 9 What made you decide to explore schools other than your current one?
- 10 What is your child's favorite book/toy/game/song?
- 11 What are the most important things you're looking for in a school?
- 12 What questions do you have for us?
- 13 \_\_\_\_\_
- 14 \_\_\_\_\_
- 15 \_\_\_\_\_
- 16 \_\_\_\_\_
- 17 \_\_\_\_\_
- 18 \_\_\_\_\_
- 19 \_\_\_\_\_
- 20 \_\_\_\_\_



With social distancing rules in place for the foreseeable future, it's also important you find ways to make your virtual interviews just as personal as your face-to-face meetings. Here are a few tips to ensure virtual interviews go smoothly:



**Opt for video calls over phone calls**

While nothing can fully replicate an in-person conversation, video meetings are a close second. While phone conversations are easier, video calls can help you connect with interviewees easier. Additionally, seeing your smiles and encouraging facial expressions can make prospective students and their families feel more at ease.



**Learn your technology**

Make sure you and your team are well-versed in whatever video conferencing technology you choose. This way, if something goes amiss, you can quickly troubleshoot the issue and get the call back on track.



**Make registration a breeze**

How will prospects schedule their interviews? How will you ensure they don't miss their appointment? Enrollment management software allows parents to easily book an interview time slot online directly from their application checklist, select a time slot from your availability, and receive automated appointment reminders via email.



**Eliminate distractions**

In a typical on-campus interview, you and the interviewee would be seated in an office or room with a closed door, and be free to converse without interruptions. Do your best to mimic this same environment at home by avoiding potential distractions. Choose a quiet space that's devoid of clutter and has a reliable internet connection.

While you can't always control everything that happens around you (like your children and your pets), the fewer interruptions to your call, the better the impression you'll leave on the prospective family.



**Sell Yourself**

Don't forget that not only are you interviewing prospective students, but they're also interviewing you. Be sure that anyone interviewing students on your behalf knows the key differentiators that set your school apart, and arm them with the perfect responses for the most common objections your prospective families raise. This is a two-way street—make sure the interview process reflects the values and personality of your school.



# Admissions Events

COVID-19 has impacted every aspect of the admissions process, but your admissions events are likely suffering the most. After all, seeing your campus in-person, meeting members of your team face-to-face, and observing other students through shadow days are significant turning points in the admissions funnel. It's often during these moments that prospective students and their parents make their decision.



**There's no doubt replicating these turning points via virtual events will be your greatest challenge — but it's not impossible.**

Like every stage of the admissions process, it's essential you carefully examine your current efforts and identify your greatest areas of opportunity.

**But, whether your events are virtual or in person, there are six things you'll need to do:**



**Choose dates well in advance**

Determine and communicate dates for admissions events as early as possible, so families have plenty of time to clear their schedules and plan around the event.



**Outline roles and responsibilities**

From communicating with attendees to preparing event content, decide who is responsible for what and delegate efficiently.

- Define your RACI (Responsible, Accountable, Consulted, Informed). For every effort you pursue, you need to determine who is...



**Responsible:** Who will do the work?

**Accountable:** Who is held responsible for the results?

**Consulted:** Who has expertise or authority and should be involved in decision-making?

**Informed:** Who needs to know the outcome of the decision/action?

Completing a RACI exercise will bring clarity and order to any project.



#### **Create an engaging agenda**

Whether they're watching from a computer screen or strolling onto your campus in person, admissions events will leave an indelible impression of your institution. It's critical your agenda is well-planned and designed to hold attendees' attention.



#### **Develop branded communications**

All communications — from email to social media — should be branded with your schools' logo and colors, and echo your brand's voice and tone.



#### **Streamline registration**

If parents can't register for an admissions event in under two minutes, your registration process is too complicated. Use simple online forms to ensure it's easy for families to fill out — and easy for you to track.



#### **Look for ways to surprise and delight**

Many of your prospective students are considering multiple schools. Make sure you stand out by creating moments of surprise and delight along the enrollment journey. Can you send a handwritten thank you note and a piece of school swag to all attendees? What if you kicked off the event with a song from your school's band? Your creativity here will go a long way.

Looking for more tips for creating captivating virtual events? **[Check this out.](#)**





# Campus Tours

**Dates** (can be recurring--i.e. every Tuesday): \_\_\_\_\_

**Time:** \_\_\_\_\_ am/pm - \_\_\_\_\_ am/pm

**Budget:** \$ \_\_\_\_\_ (or \$ \_\_\_\_\_ /attendee)

## Goals:

# of Registrants: \_\_\_\_\_ # of Attendees: \_\_\_\_\_

## For the planning of the event, who needs to be...

Responsible: \_\_\_\_\_

Accountable: \_\_\_\_\_

Consulted: \_\_\_\_\_

Informed: \_\_\_\_\_

## Who's on point:

Speaking: \_\_\_\_\_

Building Out Presentations (if any): \_\_\_\_\_

Ordering Swag: \_\_\_\_\_

Event Promotions: \_\_\_\_\_

Printing Nametags: \_\_\_\_\_

Running Tech During Event: \_\_\_\_\_

Greeting Attendees: \_\_\_\_\_

Post-Event Thank Yous: \_\_\_\_\_

Reporting on Event Outcomes: \_\_\_\_\_

## Surprise and delight:

*(How will you make the event special? Will you have VIP parking spots? Will the school band perform? Will they get a personalized piece of swag?)* \_\_\_\_\_

\_\_\_\_\_

## Promotion plan:

*(How will people find out about it? Will it be a checklist item on your application? Which channels will you use to promote the event?)* \_\_\_\_\_

\_\_\_\_\_

## What's your virtual alternative:

*Remember—not everything translates well to an online format. Get creative and cut down the length or break it up into multiple days if necessary.)* \_\_\_\_\_

\_\_\_\_\_

# Open House

**Dates:** \_\_\_\_\_

**Time:** \_\_\_\_\_ am/pm - \_\_\_\_\_ am/pm

**Budget:** \$ \_\_\_\_\_ (or \$ \_\_\_\_\_ /attendee)

**Goals:**

# of Registrants: \_\_\_\_\_ # of Attendees: \_\_\_\_\_

**For the planning of the event, who needs to be...**

Responsible: \_\_\_\_\_

Accountable: \_\_\_\_\_

Consulted: \_\_\_\_\_

Informed: \_\_\_\_\_

**Who's on point:**

Speaking: \_\_\_\_\_

Building Out Presentations (if any): \_\_\_\_\_

Ordering Swag: \_\_\_\_\_

Event Promotions: \_\_\_\_\_

Printing Nametags: \_\_\_\_\_

Running Tech During Event: \_\_\_\_\_

Greeting Attendees: \_\_\_\_\_

Post-Event Thank Yous: \_\_\_\_\_

Reporting on Event Outcomes: \_\_\_\_\_

**Surprise and delight:**

*(How will you make the event special? Will you have VIP parking spots? Will the school band perform? Will they get a personalized piece of swag?)* \_\_\_\_\_

\_\_\_\_\_

**Promotion plan:**

*(How will people find out about it? Will it be a checklist item on your application? Which channels will you use to promote the event?)* \_\_\_\_\_

\_\_\_\_\_

**What's your virtual alternative:**

*Remember—not everything translates well to an online format. Get creative and cut down the length or break it up into multiple days if necessary.)* \_\_\_\_\_

\_\_\_\_\_

# Shadow Days

**Dates** (can be recurring--i.e. every Tuesday): \_\_\_\_\_

**Time:** \_\_\_\_\_ am/pm - \_\_\_\_\_ am/pm

**Budget:** \$ \_\_\_\_\_ (or \$ \_\_\_\_\_ /attendee)

**Goals:**

# of Registrants: \_\_\_\_\_ # of Attendees: \_\_\_\_\_

**For the planning of the event, who needs to be...**

Responsible: \_\_\_\_\_

Accountable: \_\_\_\_\_

Consulted: \_\_\_\_\_

Informed: \_\_\_\_\_

**Who's on point:**

Speaking: \_\_\_\_\_

Building Out Presentations (if any): \_\_\_\_\_

Ordering Swag: \_\_\_\_\_

Event Promotions: \_\_\_\_\_

Printing Nametags: \_\_\_\_\_

Running Tech During Event: \_\_\_\_\_

Greeting Attendees: \_\_\_\_\_

Post-Event Thank Yous: \_\_\_\_\_

Reporting on Event Outcomes: \_\_\_\_\_

**Surprise and delight:**

*(How will you make the event special? Will you have VIP parking spots? Will the school band perform? Will they get a personalized piece of swag?)* \_\_\_\_\_

\_\_\_\_\_

**Promotion plan:**

*(How will people find out about it? Will it be a checklist item on your application? Which channels will you use to promote the event?)* \_\_\_\_\_

\_\_\_\_\_

**What's your virtual alternative:**

*Remember—not everything translates well to an online format. Get creative and cut down the length or break it up into multiple days if necessary.)* \_\_\_\_\_


\_\_\_\_\_

# Marketing



For a long time, many K-12 private and independent schools were able to meet their enrollment goals with little to no marketing or few concrete strategies. But times have changed. Today, independent and private institutions are facing increasing competition. And, in the age of COVID-19, it's becoming more challenging to maintain enrollment without taking action.

Whether you're new to marketing or working to level-up your strategies, we know it can be overwhelming. But while it may take a little legwork on the front-end, developing a comprehensive plan can help you consolidate your efforts and create a more streamlined, optimized, and measurable path.

Here's how: 

## STEP 1: Define Your Goals and Metrics

If it's been a while since you revisited your goals, then this is the perfect time to determine what you want to accomplish in the upcoming school year, and how you'll measure that success. Then, work backward to ensure every element of your admissions strategy is working toward those ultimate objectives.

- **Set SMART goals**

SMART stands for **s**pecific, **m**easurable, **a**ttainable, **r**elevant, and **t**ime-based. For example, *"Our goal is to increase enrollment 5% from the 2021/2022 school year."*

- **Define OKRs**

You also need to identify your objectives and key results (OKRs). For example, *"Our objective is to increase virtual inquiries for the 2020/2021 school year; our key result is to update our website and increase organic traffic by 15%."*

- **Identify your metrics**

What key performance indicators (KPIs) will you use to determine whether you're succeeding or whether you need to tweak your efforts to achieve better performance?

**Examples include:**

- Inquiry-to-application rate
- Yield
- Attrition
- Net tuition revenue

**Net tuition revenue** is the revenue a school earns from a student's tuition, which is essentially the full published tuition minus any financial aid you've provided. You can impact this metric by experimenting with ways to recruit more full-pay families. Learn more about **[net tuition strategies here](#)**.

Ideally you're using an enrollment management platform like SchoolAdmin that automatically calculates these key metrics like yield and funnel conversion rates. This gives you easy access to the data, and allows you to slice and dice the data by grade, demographics, and more.

If your system doesn't give you trustworthy data or doesn't make accessing the data easy, consider building a spreadsheet (or **[reaching out to your friends at SchoolAdmin](#)** to learn how we can help).



## STEP 2: Analyze Your Situation

Perform a SWOT (strengths, weaknesses, opportunities, threats) analysis to identify where you are, where you want to go, and what may hold you back.

Here's a quick example of what yours might include:

	<b>Helpful</b> to achieving the objective	<b>Harmful</b> to achieving the objective
<b>Internal Origin</b> (attributes of the organization)	<p><b>Strength:</b> <i>We have an excellent reputation in the community.</i></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p><b>Weakness:</b> <i>Our online presence is lacking.</i></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<b>External Origin</b> (attributes of the environment)	<p><b>Opportunity:</b> <i>Parents have demonstrated interest in engaging with us online.</i></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>	<p><b>Threat:</b> <i>Other schools in the area have a better online presence.</i></p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>



**STEP 3:**

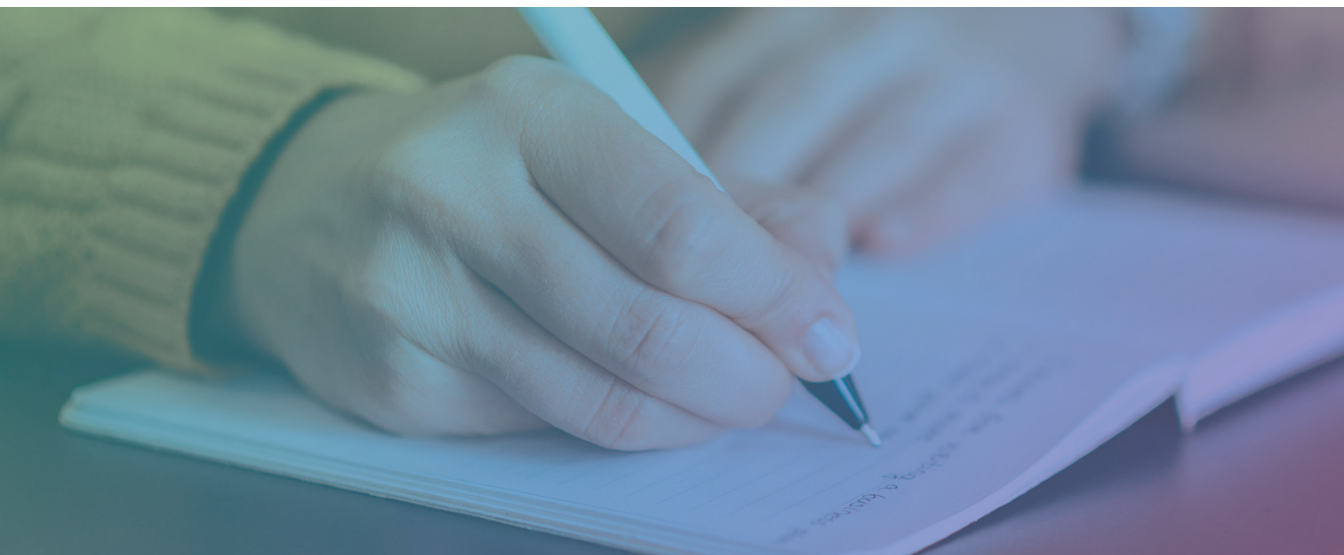
## Define Your Value Proposition

Earlier, we asked you to answer the question, “What attracts families to your school?” Knowing this will help you solidify your value proposition. Another great question to ask is, “What do you offer that others don’t?”

**Example value proposition:**

*Be asked. Be answered.  
Explore a global school with local roots where  
teachers challenge you, laugh with you,  
listen to you, and learn with you.*

Source: [George School](#)



## STEP 4: Outline Key Strategies

There are plenty of digital channels and platforms you can use to engage prospective families, but here are the most critical:



### Website

This is your digital front door and the place where people can learn about your school, your staff, and how to contact you. More than that, though, your site should showcase why your school is different and valuable.



### Social Media

It can be challenging to keep up with all the many social media platforms available today, but we suggest starting with these core three: YouTube, Instagram, and Facebook (especially for connecting with parents).



### Email

Use email to communicate directly with prospective families about events and important dates, or to share relevant and helpful content. Consider creating a nurture series for each of the goals outlined in step one.



### Content

What are some of the challenges prospective families face as they work their way through the admissions funnel? The content you create and publish, such as blog posts and videos, should address these pain points, and help prospects move on to the next stage.



### Events

Whether virtual or in-person, events are essential for delivering important information while establishing authentic connections. (You should use your website, social media, content, and email to help drive interest in your events and increase attendance.)

In an ideal world, you could prepare an omnichannel approach and be everywhere at once. But, for many schools, this isn't a realistic approach. Do the best you can with the resources you have, and lean on technology like SchoolAdmin to automate processes and free up time to expand your reach.





## STEP 5: Launch

This is the moment of truth — the moment when you execute the plan you’ve created. While launches can be anxiety-inducing, just remember you can always tweak and improve as you go along. In fact, you should never stop optimizing your plan.

## STEP 6: Reflect and Reassess

Once you’ve launched your plan, it’s time to monitor your performance and identify where to improve. For example, if you notice an increase in no-shows to virtual events, you may need to send more automated reminders.

Here is a useful checklist to refer to when developing your marketing plan:

### Admissions Marketing Checklist

- ☐ **Personas**  
*Who are your ideal students and families? (Describe them in as much detail as possible.)*
- ☐ **Value proposition**  
*What makes parents want to send their children to your school?*
- ☐ **Website**  
*Is your website informational, aesthetically pleasing, and does it communicate your value proposition? Do you have CTAs that guide prospects onto the next step?*
- ☐ **Channels**  
*Where will you invest your time and energy connecting with prospective families?*
- ☐ **Responsibilities**  
*How will you divide marketing responsibilities among your staff?*
- ☐ **Technology**  
*What tools and solutions will you rely upon to execute your plan?*
- ☐ **Advertising**  
*Will you run ads? And, if so, where will you gather the creative assets you need to run them? Do you have a graphic designer in-house or will you need to use a tool like Canva?*
- ☐ **Budget**  
*How much money do you have to work with? Can you convince your Head of School to invest more?*  
*Hint: This is easier to do when you’ve developed a strategic plan—and even better when you can prove its impact with data.*
- ☐ **Measurement**  
*What metrics will you use to monitor performance? How will you set clear benchmarks?*

Learn more about [\*\*developing a marketing plan for your school here.\*\*](#)





## PART 6:

# Communications

Do you have a communication plan? If the answer is “no,” you’re not alone. Many schools have pieced together ad-hoc communications over the years, creating a patchwork of messages without any real cohesion. And while that may have gotten you through in previous eras, it’s no longer an effective solution.

Your communications — from your website messaging to your emails, the content of live events to the way your staff describes your school in phone calls with prospects — must align with your brand. If not, you’ll leave prospective families with a disjointed impression of your school.

A great communication plan will ensure that, no matter how or where a prospect engages with your institution, they receive the same message in the same way.



**Consider these three factors while developing your communication plan:**



# The Three C's of Independent and Private School Communication

## 1 Customization

**Describe your brand's personality in three adjectives:**

*(These are the human characteristics that best describe your brand.)*

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**Describe your brand's voice:**

*(Example: Genuine, friendly, helpful, straightforward, no-nonsense, playful)*

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**Describe your brand's top three differentiators:**

*(What sets you apart from your peer schools? Why do families choose your school?)*

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**Answer "WIFM" for your prospective students:**

*(What's **In It For Me**? I.e. What are the outcomes for students that attend your school?)*

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## 2 Channels

**Make sure your brand’s personality, voice, tone, visual style, and key differentiators are reflected in all of the following:**

- ☐ Email
- ☐ Text
- ☐ Phone
- ☐ Video calls
- ☐ Social media messenger
- ☐ Website chat
- ☐ Direct mail

Make sure your plan directly addresses how to communicate via each of these channels.



## 3 Cadence

It’s not just about what your messaging says; it’s also about when it’s sent. Budding relationships with prospective families must be nurtured if you want them to bloom. In fact, **research from LinkedIn** states that 70% of unnurtured leads enroll elsewhere. That means it’s important to reach out early and often in order to build meaningful relationships that convert families from “interested” to “enrolled”.

Developing cadences for specific interests and stages of the admission funnel is a great way to do this. And—if you have an enrollment management platform like SchoolAdmin that supports automated communication plans—you can even automate many of the steps to lighten the load for your team while still creating personalized experiences for your families.

Having a combination of both manual and automated touchpoints allows you the best of both worlds—highly personalized and scalable outreach that’s always on (even while you’re away from the office leading a campus tour or meeting with a family) plus an undeniably human connection.



## Example of a Cadence for a New Inquiry

*Remember: 70% of unnurtured leads enroll elsewhere. Create a journey of many personalized touchpoints for each stage of the funnel.*

Stage	Touchpoint	Timing	Message	Channel
Inquiry	1	Immediately upon submission	Thank you for your inquiry	Automated Email
Inquiry	2	1 day after submission	Automated task created to remind school employee to mail a viewbook	Internal CRM
Inquiry	3	3 days after submission	Send information about financial aid/sports/fine arts (based on parent selection on inquiry form)	Automated Email
Inquiry	5	5 days after submission	Invite the family to attend an open house	Automated Email
Inquiry	6	8 days after submission	Automated task created to remind coach/band director/ STEM teacher (based on parent selection on the inquiry form) to call the family to share more about their program	Phone Call
Inquiry	7	16 days after submission	Automated email from a student ambassador with similar interests	Automated Email
Inquiry	8	14 days before application deadline	Reminder about upcoming application deadline	Automated Email
Inquiry	9	7 days before application deadline	Automated task created to remind Head of School to remind about upcoming application deadline	Phone Call



Now it's your turn.

You can do this based on interest, stage of the admissions of funnel, demographics, and more. Remember, the more personalized and relevant the messaging, the more likely it is to resonate with your prospective students. Your goal is to deliver the right message, to the right people, at the right time.

Nurture Stream: \_\_\_\_\_

(Example: New inquiries interested in STEM; Incomplete apps that have indicated interest in financial aid)

Touchpoint	Channel	Timing	Message	How Will It Be Sent?
1				<input type="checkbox"/> Automated <input type="checkbox"/> Manual
2				<input type="checkbox"/> Automated <input type="checkbox"/> Manual
3				<input type="checkbox"/> Automated <input type="checkbox"/> Manual
4				<input type="checkbox"/> Automated <input type="checkbox"/> Manual
5				<input type="checkbox"/> Automated <input type="checkbox"/> Manual
6				<input type="checkbox"/> Automated <input type="checkbox"/> Manual
7				<input type="checkbox"/> Automated <input type="checkbox"/> Manual



# Ambassador Programs

A **student ambassador** is someone chosen to represent your school to prospective students and families throughout the admission process. They often act as liaisons between your school staff and those considering attending.

As you're revamping your processes, it's a good time to consider developing a student ambassador program. Or, if you already have one, you can identify ways to leverage your student ambassadors to help you boost enrollment for the fall.

## Student ambassadors can help you...

- **Build trust** by adding a layer of authenticity to admissions efforts.
- **Foster relationships** by providing unscripted viewpoints and giving candidates a window into your school.
- **Provide leadership opportunities** for excellent students and inspire other students to take a more active role in representing your school.

## They can accomplish tasks, like...

- Calling and emailing prospective students
- Hosting virtual or in-person campus tours
- Hosting live Q&As with prospective students and families
- Assisting students through the orientation process

## When identifying potential student ambassadors, look for students with the following qualities and skill sets:

- Positive attitude
- Extracurricular involvement
- Acceptance of others
- Professionalism
- Communication skills
- Interest in leadership
- Diverse backgrounds

While it may be tempting to seek out your highest performers for your ambassador program, many schools have found better results when involving a more diverse set of students.

Learn more about **[student ambassador programs here](#)**.



# Website

When was the last time you updated your school's website? As an admissions and enrollment professional, this can be an overwhelming task — especially since a full website refresh can take many months and thousands of dollars.

Updating to a more modern, user-friendly, and aesthetically pleasing design is crucial to establishing a memorable online presence and leaving the right impression. But it's not something you can pull off in a couple of weeks. Instead, start with the following:



## Declutter your homepage

We get it — your school's website has to serve a broad set of constituents. It acts as everything from the weekly calendar for existing students to the fundraising hub for your school's development team. But don't forget: it also needs to drive your school's admissions efforts. Even if the ownership of your school's website doesn't sit within your team, you need to advocate for several things.

- **A strong admissions-focused homepage call to action (CTA):**  
Make sure anyone who lands on your site seeking admissions information immediately knows where to go.
- **Your school's mission statement and value proposition:**  
Make sure prospective families know exactly what your school stands for, and what makes your educational experience unique.
- **A simple, user-friendly design:** When it comes to homepage designs, less is more. Don't overwhelm visitors with photo collages, lengthy chunks of copy, or too many fonts and colors. Instead, stick with the basics. The fewer distractions on the page, the more likely you will be to drive conversions.







**Revise your copy to reflect your brand voice and tone**

Your messaging should align with the brand and voice you're using with prospective families, and reinforce the story you share about your school. Additionally, make sure all content is concise, descriptive, and easy-to-read.



**Create clear CTAs throughout the website**

If someone visits a page on your website and doesn't know how to answer the question, "What am I supposed to do next?" then your CTAs aren't clear enough. Whether you want people to engage with a piece of content, fill out a contact form, register for an event, or sign up for email notifications, it's crucial you let them know.



**Make it easy for users to find what they need**

Navigation should be simple and straightforward. Don't make visitors hunt to find contact information or inquiry forms. After all, the deeper these elements are hidden, the more likely they are to give up.



**Add social proof**

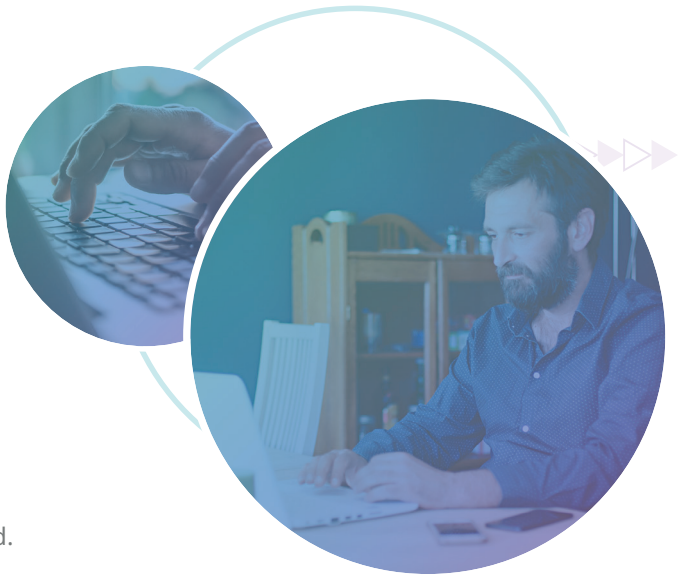
You have plenty of praise for your institution, but prospective families don't want to hear it from you — they want to know what other families, like them, think of your school. Be sure to include real testimonials from current students and alumni to add a layer of credibility to your claims.



**Here's a useful survey checklist for reviewing your website:**



## Website Review Checklist



- ☐ The home page clearly displays the school value proposition.
- ☐ Contact information is easy to find.
- ☐ Once I land on the homepage, the next step for inquiring or applying is obvious.
- ☐ I can navigate to the about page, admissions page, and contact page all from the homepage.
- ☐ Every single page includes a clear call-to-action.
- ☐ I see social proof in the form of parent and/or student testimonials.
- ☐ The website provides multiple opportunities to subscribe to the blog and/or newsletter.
- ☐ All messaging reflects the school brand's voice, tone, and style.
- ☐ I can easily find information about athletics, arts, and other extracurriculars on the website.
- ☐ The website includes images and videos of real students.
- ☐ The website includes multiple opportunities to request information, schedule a tour, or apply.
- ☐ Inquiry forms are simple and can be completed online in less than two minutes (without requiring families to download/upload a PDF).
- ☐ I receive an email confirmation after I've filled out an inquiry form. Bonus points if it's personalized based on interests indicated on the form.
- ☐ I can quickly locate links to social media accounts from the website.
- ☐ The website leaves me with a positive impression of the school.

Psst! If you're not included in conversations about your school's website, then you need to be. Your perspective is essential to the website's success. Learn more about **claiming your seat at the table here**.



# Finding More Students

The math is simple: you can't meet your enrollment goals without a steady stream of interested prospective families. It's important to pique the interest of new families that would be a great addition to your school.

But where can you find them?

**Here are a few suggestions for growing your audience:**



## **Paid social advertising**

Paid ads on social media platforms can boost your school's exposure and drive more visits to your website. Best of all, social media ads can be highly targeted to specific users.

This way, you can be confident you're getting your ads in front of people who would be interested, or those already considering schools for their child. You can also optimize your ads as you go, continually improving your return on ad spend (ROAS).



## **Work with feeder schools**

Contact local private schools that may feed into your school, and begin developing relationships with administrators and staff. For example, if your school is a 9-12 institution, you may want to connect with nearby private middle schools who may encourage their families to apply to your school.



## **Leverage your network**

From realtors selling homes to families in your area to local pediatrician's offices, summer camps, karate and dance schools, there are plenty of people in your community that serve families with children in the age range your school serves. Tap into your network and identify possible connections with these professionals and organizations, and form mutually beneficial partnerships.



## Moving Forward

Completing an admissions refresh is no small feat. It requires plenty of planning, attention-to-detail, tenacity, and a passion for connecting with people. Luckily, those are all qualities that successful admissions and enrollment professionals, like you, already possess. As the heart and backbone of your institution, you know better than anyone what makes your school great, and you're well-versed in sharing its story.

There's no denying we're living in strange times, and the road ahead hasn't been mapped. This admissions season will be rife with challenges — but it's full of opportunity, too. By taking the time to revamp your processes using the resources in this guide, you'll be prepared for whatever the path may hold.

## About SchoolAdmin

SchoolAdmin is a powerful and modern enrollment management platform, with a customer-loved suite of integrated Admissions, Enrollment, Retention, and Tuition Management tools. Our easy-to-use software and award-winning customer support are designed to help you and your school thrive by building stronger relationships and more successful enrollment management strategies.

Headquartered in Austin, Texas, and trusted by more than 500 of the most successful schools, our diverse and passionate team is dedicated to empowering K-12 admissions and business professionals around the world.

  
**SchoolAdmin**

Learn more at

**[www.schooladmin.com](http://www.schooladmin.com)**

