

# March 1-2, 2016 SCSBC Business AND Development Conference for Christian Schools

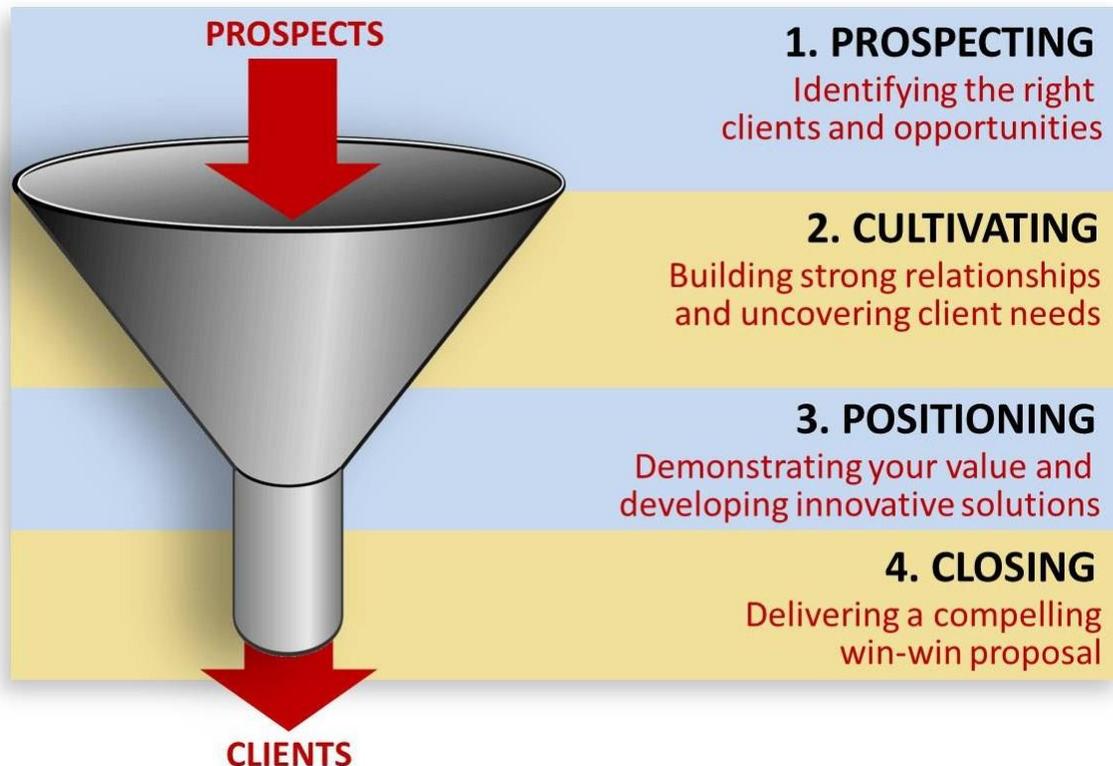
## **The Enrolment Funnel Q & A** *hosted by Sam Rehman*

In this Q&A session we'll discuss best practices in admissions, with emphasis on building enrolment funnels and how they are easier to create than you might think. Having one will drive your recruitment and retention efforts and decisions, leading to better results.

Think of an oil funnel. One side is wide open while the other side has a drastically smaller opening. You pour oil into one end and it flows out of the other. In the recruitment of families, "Admissions Offices" use a proverbial "recruitment funnel."

The funnel determines what information is communicated to the family and when it is communicated. It determines what information the student might receive via snail mail or electronic, because different messages need to be communicated at different stages. From the stages of the funnel, we can monitor weekly stats, monitor growth and calculate overall projections to determine if you will meet your goal. However, unlike oil in a funnel, not all families will flow down the funnel, or move from one stage to the next.

Knowing where a family is in your funnel help you understand where the family is in their decision-making and can help you understand their needs. As you understand and know how to manage different stages of the funnel, you are able to tailor your messages to the family to offer information that will help in their decision-making. This in turn can encourage families to move into the next stage.



There are six main stages in the funnel: 1) inquires, 2) prospects, 3) applicants, 4) admits, 5) deposits, and 6) enrolled.

Your goal from an admissions perspective, is to move students from one funnel stage to the next.

### **Inquiries**

The first stage in the funnel is the inquiry stage. Inquiries are those families who inquire to your school but have given no indication of their interest in attending. They may just request information or ask a few questions. This is the start of the journey for Admission staff. A key to meeting your admission goal is getting as many inquiries as possible throughout the year. The more families that enter the funnel at the top, the greater the likelihood you will hit your recruitment goal at the end of the year.

*Conversion rates* (that you use for each stage of the funnel) help you determine, based on past performance, how many inquiries will become prospects and move through the funnel to become enrolled students at the beginning of the school year. Used year-over-year, your conversion rates will become more accurate. However, keep in mind they also are reflective of past performance.

You can cultivate inquiries from inquiry mailings, campus visit/drop-ins, letters, phone calls, email, your website, referrals and open houses/preview days. You will collect inquiries throughout the year, but the later a family inquires, the lower likelihood of them staying long-term.

If you haven't, I strongly suggest you create a "Welcome/Visitor form" for guests to fill out when they come to your school. You can collect a lot of helpful information on these sheets. Have them available for your open house as well – collect as much data as possible.

### **Prospects**

The next funnel stage is prospects. Prospects are student who tell you they are interested (any level) in attending your school. As soon as you know an inquiry has any level of interest, they become a prospect. Therefore, there are normally many prospects as well, but knowing they are a different stage helps you provide better service to those families. These are the family's that you begin working with. You should focus your efforts on this grouping first. You can send them mailings (electronic and/or paper), phone calls and emails. Basically, you want to be in touch with them to get them into the next funnel stage to encourage them to apply.

### **Applicants**

Applicants are those families that apply to your school for the upcoming school semester or year. Sometimes applicants can be a tiring chase getting them to complete everything. Some will submit everything altogether –the dream! ☺ – and others will require reminders to submit missing pieces of information.

### **Admits**

Admits are families who have had their application accepted by your school for the upcoming school year/semester. Not everyone will become this stage and at this point it's great to pass them on to other SCSBC schools – if appropriate!

### **Deposits**

Deposited families are those who submit a deposit to retain their seat in the (applied for) grade. This is the family's real commitment to your school.

Since some families might be comparing your school to others schools they've applied to, some school have higher application fees to help weed out the lookey-lou's from those that are serious. This can help determine who they should be spending their time with. This works too.

Deposits CAN be refundable depending on your policy, or you can make them non-refundable. Something to consider is that if they've paid a deposit, and it's non-refundable, you might want to offer them to "forward" their deposit to the following semester/year as a way to keep connected to your school and a chance to follow up with them again.

## **Enrolled**

These are students that arrive on your campus in September to begin their experience with your school. Most other people at your school might only care about this number as it then affects their classroom, work, budget, chapel schedule, etc. But this number (only) won't help your board or principal understand the amount of work it took to get them to this point and what you might need to get your new enrolled number.

That's the funnel. Understanding it allows you to determine how best to serve your student based on where they are in the funnel. Obviously, you're not going to encourage a student to submit their deposit if they are only a prospect. However, it will help you cater your messages to the appropriate listener, depending on their funnel stage.

## **To sum it up:**

Starting with your goal of enrolled new student number and work the funnel up, using your conversion rates, will tell you how many deposited student you will need. You can then calculate, the admits, applications as well as prospects and inquiries needed to hit your goal. This gives you goals to aim for as you work throughout the recruitment cycle and helps you know throughout the year if you are on track to get the amount of student you aimed for. The longer you work in this role, the better you will become at managing what needs to be done at what time.

<b>Stage 1:</b>	<b>Inquiry</b>	A family who inquires but provides no indication of their interest in attending
<b>Stage 2:</b>	<b>Prospect:</b>	A family that's inquired to receive more information/has attended an open house, event, toured the school, etc.
<b>Stage 3:</b>	<b>Applicant:</b>	WRCA has received ANY part of an application (family or student)
<b>Stage 4:</b>	<b>Evaluation:</b>	Application complete; waiting to be interviewed
<b>Stage 5:</b>	<b>Rejected:</b>	Student/family is inadmissible based on WRCA's Admission Policy
<b>Stage 6:</b>	<b>Waitlisted:</b>	Student is admissible to WRCA but admitted first to a waitlist for the grade applied for. Student will not be fully admitted until a spot open in said class/grade
<b>Stage 7:</b>	<b>Admitted:</b>	Student is accepted into grade applied for
<b>Stage 8:</b>	<b>Deposit:</b>	Enrolment deposit has been received
<b>Stage 9:</b>	<b>Withdraw:</b>	Family has decided to no longer pursue/attend WRCA
<b>Stage 10:</b>	<b>Enrolled:</b>	Family has begun to attend WRCA
<b>Stage 11:</b>	<b>FFWD:</b>	If you want, you can "file forward" the student application to the following year

**Important:**

Track the dates that are important to you. If I could track all the dates in a CRM automatically, I would, but I don't have the time. However, I track the inquiries, applicants, and admits as well as the date they became each stage, as that helps me. Determine what will help you, and plan accordingly.

**EXAMPLE:**

September 2015

	<b>Total</b>	<b>Conversion Rate</b>
<b>Inquiries</b>	163	
		95.09%
<b>Prospects</b>	155	
		90.32%
<b>Applicants</b>	140	
		85.71%
<b>Deposits</b>	120	
		96.67%
<b>Enrolled</b>	116	