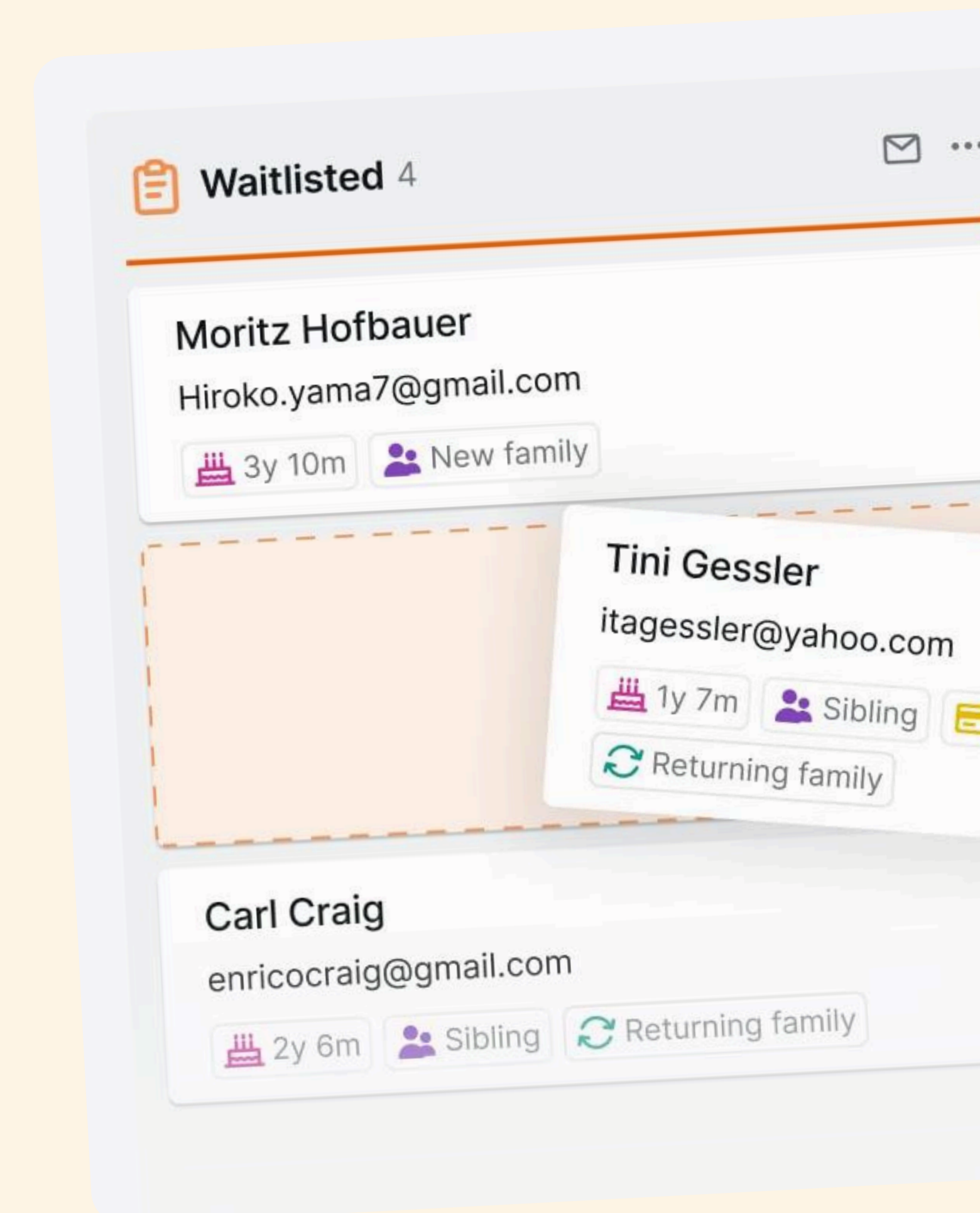


Top CRM Automations to Boost Engagement

With the right CRM automations in place, you can reduce admin work, keep leads engaged, and seamlessly guide them toward enrollment. Set it and forget it—your automations will trigger based on each lead’s actions. Discover how the best automations enhance communication and create a seamless experience for both parents and staff.



🌟 Welcome email

Say a quick hello to new inquiries with a welcome email that outlines the enrollment process and prompts the recipient to book a tour.

🌟 Tour reminders

No-shows can be frustrating. Automated reminders 24 hours and 2 hours before a tour gives busy guardians a helpful nudge.

🌟 Tour follow ups

Keep the momentum going after a great tour with an automated follow-up with links to testimonials or FAQs.

🌟 Re-engagement sequence (30 days)

Some parents just need more time to decide. An automated reminder 30 days after last contact keeps your program top-of-mind.

🌟 Re-engagement sequence (90 days)

A guardian might need more incentive to enroll. Convert a hesitant lead with a special offer—like waived registration fees—or invite them to an upcoming event.

🌟 1 week check-in

A quick check-in after a student’s first week ensures a smooth transition. This is a chance to address any concerns and reinforce your open-door policy.

🌟 30 day check-ins

The first month sets the stage for the rest of a families’ experience. A 30 day check-in can remind parents of key resources and policies. It’s also a chance to request feedback on the onboarding process.

🌟 90 day check-ins

By the 90 day mark, parents and students are in a solid routine. Check in to highlight upcoming events, offer a direct line for questions, and promote extracurricular activities.

🌟 Enrollment anniversary

Expressing gratitude to families for being in your community can help retention. Just a simple "happy 1 year with us!" goes a long way.

