

Automating Child Care Operations:

Grow your child care program while maintaining high quality care



Automate your operations: a checklist

This checklist covers essential strategies, from real-time financial insights and automated marketing to streamlined staff management, parent communication, and simplified administration—all designed to improve efficiency and enhance your work-life balance.



01 Financial Oversight



04 Family Communication



02 Marketing Efforts



05 Admin Processes



03 Staff Management



06 Work-Life Balance



01 Financial Oversight

Organized and clear finances are crucial to success as a business owner and operator. By reducing the manual work involved in collecting tuition, charging late fees, managing subsidies, and paying your expenses, you will be able to spend less time resolving issues and more time on impactful decisions.

- Set up automated financial dashboards for real-time revenue and expense tracking.
- Set up automated alerts for upcoming payments, overdue invoices, and new charges.
- Collect tuition payments online.
- Create dashboards to track payments, delinquencies, and expenses.
- Set up mandatory auto-pay



02 Marketing Efforts

Automating your marketing efforts allows you to generate leads and future potential business for your child care program without spending hours of time on back-and-forth communication and record keeping.

Having a CRM to track lead details and interactions will greatly reduce manual work in your marketing efforts.

- Automate contact information collection from prospective families through online forms.
- Automatically track engagement from prospective families with your program through calls, emails, messages, and more.
- Set up automated messages to respond to inquiries and application submissions.
- Accept tour bookings online.
- Automatically pass family data into your software system upon conversion from prospective family to customer.



03 Staff Management

Staff operations can be automated to simplify onboarding, scheduling, payroll, compliance, paperwork, hour-sheets, PTO tracking, benefits and much more.

These automations will increase staff retention while minimize work for admin teams to keep everyone within compliance.

- Digitize your staff onboarding process to collect all paperwork, payment details, and personal information online.
- Have staff set up payroll accounts - linking bank accounts and filing tax documents.
- Track staff check-in and check-out using software to streamline payroll.
- Set up renewal dates for paperwork and licensing requirements to automate compliance processes.
- Manage scheduling online to streamline PTO, absences and substitute scheduling.



04 Family Communication

Keeping your families engaged and updated on their children is essential to build loyalty to your child care program.

Something as simple as sharing photos, a weekly newsletter, or sending announcements to your entire program will keep families involved.

Automation can streamline most of this communication!

- Allow families to complete enrollment online.
- Set up online tuition payments for families.
- Set up weekly newsletter templates to share with your families.
- Create chats for classrooms, allowing parents and staff to communicate.
- Set up engagement tracking for your program to ensure staff are sending photos and sharing updates.



05 Admin Processes

Admin processes are what allow your child care program to operate smoothly.

Tuition and paperwork need to be collected and reviewed, enrollment needs to be managed, meal programs must be planned.

Many of these “back-office” tasks can be automated to reduce manual work from your admin team.

- Digitize admin operations including enrollment, tuition management, and program scheduling.
- Create custom admin roles for each staff member in your online software to facilitate controls.
- Collect all program paperwork online to simplify management and upkeep.
- Set up admin automations such as classroom transitions, program close dates, and more.



06 Work-Life Balance

Automating daily tasks not only simplifies operations for owners, administrators, staff, and parents but also boosts overall efficiency.

Automation can reduce time spent on administrative tasks significantly, allowing business owners to focus on what truly matters—running and growing a thriving child care center.

- Eliminate all offline paperwork to reduce back-and-forth with parents and families.
- Create a centralized repository of program handbooks and documents for your families and staff to reference.
- Create program schedules weeks and months in advance, allowing administrators to plan for smooth operations in the long-term.

By implementing this checklist into your child care program, every aspect of your operations will benefit ultimately improving the experience for your families and staff while creating a stronger work-life balance for all staff members, ensuring the longevity and success of your program.



A note from Ashley Binns

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I assist entrepreneurs in launching or expanding their Early Childhood Education Businesses. Using a comprehensive framework, I ensure smooth transitions from inception to full operation, focusing on startup efficiency and operational effectiveness.

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See how Southern Oregon Head Start saves \$6k per month by using Playground to manage their child care operations.

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