Enrollment Communications Playbook

For use in schools of the Archdiocese of St. Louis

1. Purpose and Goal Setting

Every family that reaches out about enrolling is a lead. The "GoCatholic!" The campaign will drive more inquiries to our schools, so this plan ensures each inquiry gets a fast, warm, consistent response and is tracked from first contact through **enrollment**.

It is important to set goals for your school's enrollment year over year. Here are some suggested goals that you can tailor to your own enrollment cycles:

Goals for the first campaign year (adjust to your baseline)

- Respond to 100% of inquiries within **1 business day** (target: same day)
- Convert **[X]%** of inquiries into scheduled visits
- Convert **[X]%** of visits into applications, and **[X]%** of applications into enrollments
- Know the source of **90%+** of leads so we can see which campaign channels work

2. Where Inquiries Come From

Schools should expect inquiries through all of these channels. Each needs an owner and a place to be logged.

Channel	Examples	Log it by
Website form	"Go Catholic!" landing page, school site "Request Info"	Auto-capture (preferred)
Phone	Front office calls	Staff enters same day
Email	Office or principal inbox	Staff enters same day
Walk-in / event	Open house, parish events, school fairs	Sign-in sheet or QR form
Parish referral	Pastor, DRE, parish staff	Referrer name recorded
Social media	Facebook/Instagram messages or comments	Move to email/phone, then log
Word of mouth	Current families, alumni	Ask "How did you hear about us?"

Rule: No matter how a family reaches us, the same information is captured and the same workflow starts.

3. Roles

Each school names one person for each role (one person may hold several in a small school).

- **Inquiry Coordinator** (typically admissions director or front office lead): owns the lead log, sends first responses, runs follow-up.
- **Principal / Admissions Lead:** leads tours and personal conversations, and handles tuition assistance conversations.
- **Archdiocesan Campaign Contact** [Thomas] supplies shared templates and campaign assets, and supports schools that need help.

4. The Family Journey and Response Standards

Stage	What it means	Standard	Owner
1. New Inquiry	Family makes first contact	Acknowledge within **1 business day** (call or email within 4 business hours is ideal)	Inquiry Coordinator
2. Engaged	Two-way conversation started, questions answered	Personal follow-up within 2 business days of any reply	Inquiry Coordinator
3. Visit Scheduled	Tour, shadow day, or open house booked	Confirmation sent immediately; reminder 1 day before	Coordinator
4. Visit Completed	Family toured or attended	Thank-you within 24 hours; next steps included	Principal
5. Applied	Application submitted	Receipt confirmed within 1 business day; decision timeline shared	Coordinator
6. Accepted / Enrolled	Offer made, registration complete	Welcome packet and onboarding sequence	Principal / Coordinator
Closed – Not Enrolling	Family chooses another option	Log the reason; send a gracious closing note	Coordinator

5. First Contact Playbook

Within 1 business day, every new inquiry should receive

1. A **personal reply** (not just an auto-response) from a named staff member
2. A **direct answer** to what they asked
3. A **clear next step**: schedule a visit
4. **Your contact details** and the best way to reach you

A phone call is the strongest first touch for most families. Recommended pattern: call, and if there is no answer, leave a brief voicemail and send an email right after.

Questions families most often ask

Prepare short, consistent answers to:

- Tuition, fees, and what's included

- Financial aid, tuition assistance, and any archdiocesan or parish support [insert current programs]
- Whether non-Catholic families are welcome
- Class sizes, academics, and special-needs or learning support
- Before/after care, transportation, and lunch
- Safety and student formation (including Virtus compliance)
- Faith life: Mass, sacramental preparation, religious education

> **Tip:** Maintain a one-page FAQ per school, reviewed each August, so any staff member can answer accurately.

6. Follow-Up Cadence

Persistence matters. Most families inquire at several schools, and the school that follows up well often wins. Stop the sequence as soon as the family responds, then move to a personal conversation.

Touch	Timing	Channel	Purpose
1	Day 0–1	Phone + email	Personal welcome, invite to visit
2	Day 3	Email	Share a family story or short video
3	Day 7	Phone or text*	Check in, offer specific visit dates
4	Day 14	Email	Tuition assistance info, deadlines
5	Day 30	Email	Invite to upcoming open house or event
6	Day 45–60	Email	Final friendly check-in; leave the door open

**Text only with the family's consent (see Section 9).*

After a visit: thank-you within 24 hours; check-in at day 3; application reminder at day 7 and before each deadline.

Seasonal rhythm: Plan stronger outreach during **Catholic Schools Week (late January)**, open house season, and before application and tuition-assistance deadlines. Keep a standing process for **mid-year inquiries**, which are common when families change schools unexpectedly.

7. Message Templates

Schools should personalize every template: use the family's name, the child's grade, and one specific detail from their inquiry.

Template A: First response email

> **Subject:** Thank you for your interest in [School Name]!
>
> Hi [Parent Name],
>
> Thank you for reaching out about [School Name] for [Child's Name / grade]. We're delighted you're considering us!

> [Answer to their specific question.]
>
> The best way to get to know our school is to see it in person. Would [two specific dates/times] work for a tour? You can also reply with a time that suits you, or call me directly at [phone].
>
> We'd love to meet your family.
>
> Blessings, [Name, Title, Direct phone/email]

Template B: Post-visit thank-you

> **Subject:** It was wonderful meeting you!
>
> Hi [Parent Name],
>
> Thank you for visiting [School Name] today. [Personal detail, e.g., "[Child] seemed to love the science lab!"]
>
> Here are your next steps: [application link, deadline, tuition assistance info]. I'm happy to answer any questions, big or small.
>
> [Name, contact]

Template C: Gentle follow-up (no response)

> **Subject:** Still thinking about [School Name]?
>
> Hi [Parent Name],
>
> I wanted to check in and see whether you have any questions about [School Name]. Many families tell us tuition or schedules were their biggest questions, and we're glad to talk through either. [Next open house/visit options.]
>
> [Name, contact]

Template D: Closing the loop (family chooses elsewhere)

> Thank you for considering [School Name]. We wish [Child's Name] every blessing, and our door is always open if your plans change.

Spanish-language versions of all templates are recommended (see Section 10).

8. Tracking and Reporting

8.1 The Lead Log

Every school keeps **one central lead record per family**, in a shared spreadsheet at minimum, or in a designated if the enrollment platform if the school already has one. Minimum fields:

Field	Notes
Date of first inquiry	
Parent/guardian name, phone, email	Preferred contact method and best time
Child's name, current grade, grade sought, target year	
Lead source	Website form, call, event, parish referral, social, other

Field	Notes
Campaign source	"Go Catholic!" tag (use unique URL/UTM or QR code)
Current school type	Public, other private, homeschool, other Catholic
Parish affiliation (if any)	Helps with parish partnership follow-up
Stage	Per Section 4
Date and type of each contact	
Visit date and outcome	
Financial aid interest	Yes / No / Unsure
Next action and due date	
Notes and closed reason	

8.2 Suggested Source Tracking Solutions

Here are four options, from simplest to most involved. Prices and limits were checked in October 2026, so confirm them before committing.

1. **Google Sheets + Google Form (free).** This is the best starting point for a school with one admissions person and no budget.
2. **HubSpot Free CRM (Client or Customer Relations Manager) ($0).** It's easy to use and covers contacts, a "deal" pipeline, forms, and email tracking. Recent sources say newer free accounts are capped at 1,000 contacts, 2 users, and 1 deal pipeline, with HubSpot branding on emails and forms. Other reviews still describe much higher limits, so verify on HubSpot's site. Automation requires a paid plan.
3. **Zoho CRM Free Edition ($0).** It's free for up to 3 users, and paid plans start at $14 per user per month on annual billing. The free edition includes leads, contacts, and deals, basic workflows, reports, and a mobile app, but no AI features or advanced customization. It takes more setup effort than HubSpot.

8.3 Making Source Tracking Work

- Give the "Go Catholic!" campaign **its own landing page and form**, with a hidden field for the source (ad, mailer, parish bulletin, social, etc.)
- Use **unique QR codes and URLs** per channel (parish bulletins, direct mail, billboards)
- Have staff **always ask** "How did you hear about us?" on calls and visits, and log the answer

8.4 Key Metrics (reviewed monthly)

Metric	How to calculate
Inquiries by source	Count per channel
Response time	Average and % within 1 business day
Inquiry-to-visit rate	Visits ÷ inquiries

Metric	How to calculate
Visit-to-application rate	Applications ÷ visits
Application-to-enrollment rate	Enrolled ÷ applications
Overall conversion	Enrolled ÷ inquiries
Lost-lead reasons	Cost, location, schedule, academics, other

8.5 Reporting Rhythm

- **Weekly (school):** Coordinator reviews open leads and overdue follow-ups (15 minutes)
- **Monthly (school to Archdiocese):** Submit the standard metrics summary by [day of month]
- **Quarterly (Archdiocese):** Share a campaign dashboard and best practices with all schools; identify schools that need support

9. Privacy and Compliance

- Follow school and archdiocesan **data privacy policies**. Store lead information only in approved systems, with access limited to staff who need it.
- Collect only what's needed. Include a short **privacy notice** on the inquiry form.
- **Email marketing:** include a clear unsubscribe option and honor opt-outs promptly.
- **Text messages:** send only with the family's clear, documented consent, and honor "STOP" requests.
- Be extra careful with information about children, including learning needs and financial details; share only on a need-to-know basis.
- [Archdiocesan counsel/IT to review and confirm requirements before launch.]

10. Welcoming Every Family

- Offer **Spanish-language** materials and bilingual contact where possible, and other languages as the community requires.
- Make clear that **families of all backgrounds are welcome** [confirm with archdiocesan policy], and describe plainly how Catholic identity shapes school life.
- Make forms **mobile-friendly** and accessible. Many families will inquire from a phone.
- Avoid jargon. Explain terms like "sacramental preparation" or "tuition assistance" simply.
- Be sensitive to cost concerns: raise financial assistance early, not as an afterthought.

11. Rollout Timeline (suggested)

Phase	Timing	Actions
Prepare	Weeks 1–4	Finalize plan; build campaign landing page, form, and tracking; create shared templates and lead log; legal/privacy review

Phase	Timing	Actions
Train	Weeks 4–6	Train Inquiry Coordinators and front office staff on workflow, templates, and logging; assign backups
Pilot	Weeks 6–10	Test with [3–5] schools; collect feedback; refine
Launch	Campaign start	All schools live; monthly reporting begins
Optimize	Ongoing	Review data quarterly; shift campaign spend to best-performing channels

12. Quick-Start Checklist for Schools

- ☐ Set goals and benchmarks for enrollment cycle
- ☐ Name an Inquiry Coordinator and a backup
- ☐ Set up the lead log (or confirm CRM access)
- ☐ Update the school FAQ and tuition/financial aid page
- ☐ Personalize the four message templates
- ☐ Confirm the “Go Catholic!” inquiry form routes to the right inbox
- ☐ Schedule tours and open house dates for the next 90 days
- ☐ Block 15 minutes weekly for lead review
- ☐ Commit to the 1-business-day response standard