Inquiry to Enrollment Process- Internal Document

Step 1: Inquiry Received - Client Services (Enrollment Team)

- Trigger: A contact file is created due to:
    - o Inquiry form submission, or
    - o A tour is booked directly.

Step 2: Is a Tour Booked? - Client Services (Enrollment Team)

- Yes: Proceed directly to the tour (Step 3).
- No: Client Services (Enrollment Team) to reach out to the family to schedule a tour.

Step 3: Tour Completed - Center

- Action: Tour is conducted at the center.
- Follow-up:
    - o Center staff submits the tour outcome via the Center Director Portal.
    - o *Important*: If the outcome is not recorded, the Client Services (Enrollment Team) will not receive a follow-up task. Halting the process.

Step 4: Registration Support - Client Services (Enrollment Team)

- Action:
  Client Services (Enrollment Team) assists the family with completing the online registration process.

Step 5: Enrollment Confirmation - Client Services (Enrollment Team)

- Action:
  Send a confirmation email to the family that includes:
    - o Enrollment confirmation
    - o First day forms
    - o Center contact information
- Automation triggered in HubSpot when Lead Status is set to "Enrolled":
    - o An automatic email is sent to the center at the time of enrollment and additional reminders of the child's upcoming start to ensure smooth onboarding.

Step 6: Onboarding - Center