

Putting Tech to Work for Language Schools

Engage and Enrol More Students
at their Critical Stages
of Decision-making



Presenters



Scott Cross

HEM Education Marketing Solutions

- We are a HubSpot CRM Partner
- We have built a CRM for Education and an online Student Application Portal
- Consult schools to optimize lead-follow workflows



Rania Ghaly

Apex Language and Career College (ALCC)

- Founded in 2000
- Located in Halifax, Nova Scotia
- We are a DLI, LC member, EduNova member

Agenda

- Elevating Admissions Management
- Personalization and Lead Nurturing at a Critical Stage
- Simplifying the Application Process
- What a CRM Can Do for You
- Optimizing for Success by Tracking Performance



What's it Like for You?

To what degree is your admissions management process online?

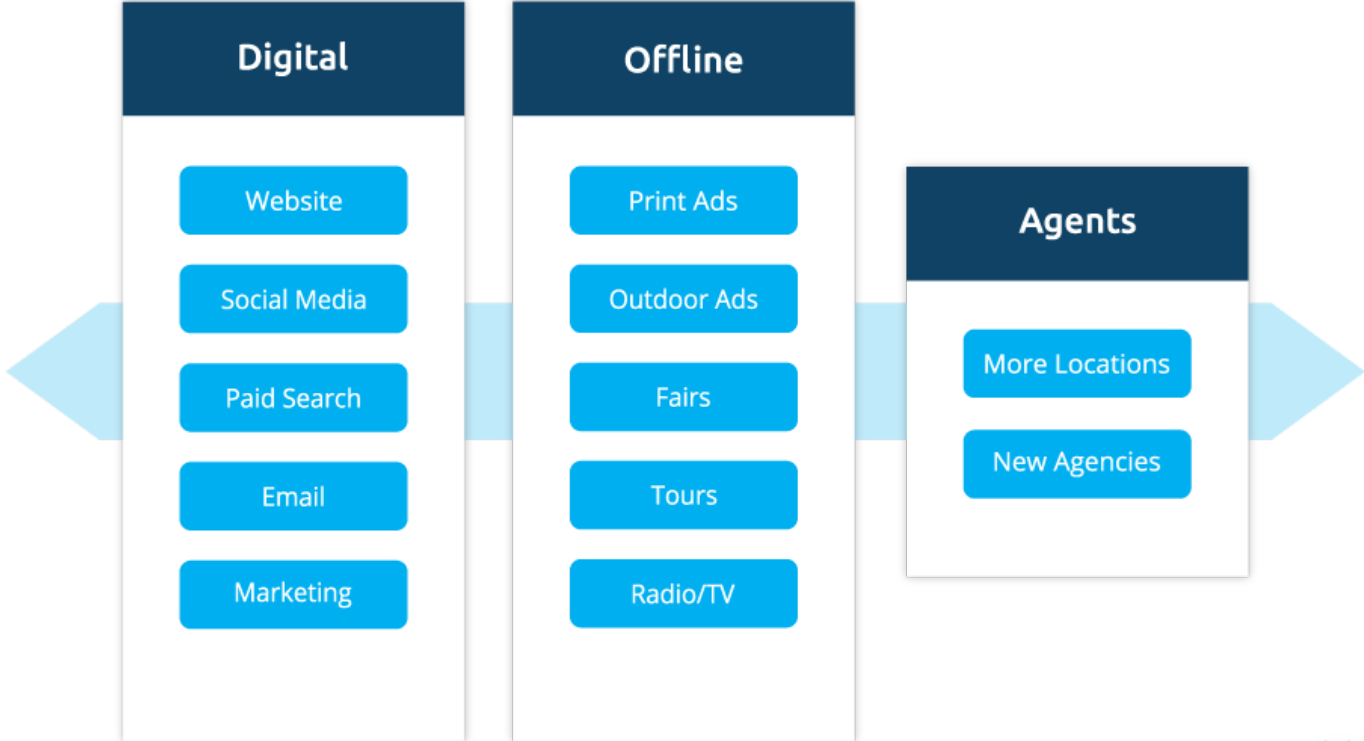
- None. It's still all in person and on paper
- PDF application is ready for download on our website
- Users fill out contact form to access PDF online
- Full application online



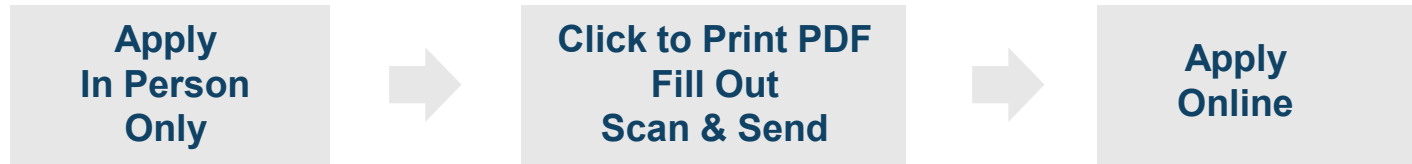
GO TO [menti.com](https://www.menti.com) CODE 4905 0366

Elevating Admissions Management

Understanding the Recruitment Pipeline



We Have Evolved!



We Have Evolved!



**Apply
In Person
Only**



**Click to Print PDF
Fill Out
Scan & Send**



**Apply
Online**

We Have Evolved!



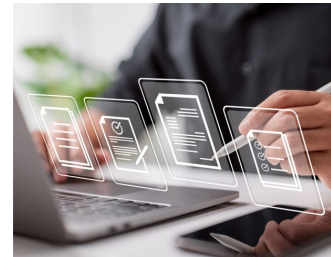
**Apply
In Person
Only**



**Click to Print PDF
Fill Out
Scan & Send**



**Apply
Online**



CRM - Customer Relationship Management

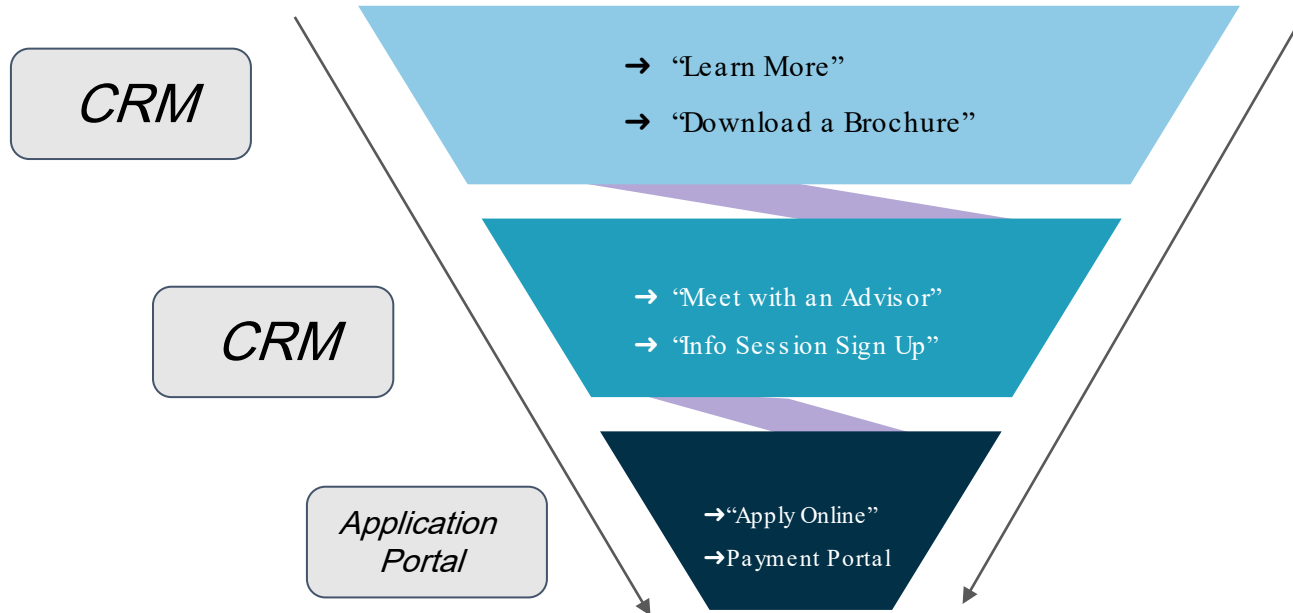


What can a CRM help with?

- a) Collecting contact info of perspective students
- b) Sending auto-reply emails to them once they fill out your form
- c) Sorting your leads into groups based on Country, Program, Language, etc.
- d) Sending out email drip campaigns to leads based on their sorted group.
- e) Assigning a member of your team as 'owner' responsible for follow-up with each lead
- f) Prioritizing leads based on their engagement and responses to your communications
- g) Reporting the ROI of your marketing/communications efforts based on

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Technology in the Funnel



ALCC's Realities

Challenges

- Return to in-person classes
- Increased workload
- Lack of online presence
- Lack of manpower

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CRM

- Needs analysis
- Tech knowledge
- Capacity to build & tailor
- Use right away

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How It Started



Request a
FREE Assessment of Your
Online Presence Today!

*Are you effectively reaching your student
recruitment goals?*



New Meeting Booked with **Scott Cross**

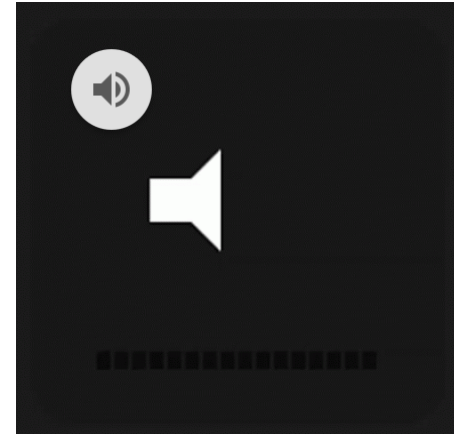


Email address
rghaly@alcc.ca

Date / time
February 24, 2022 3:15 PM AST (UTC -04:00)

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How Is It Going



Offer a More Engaging Inquiry Experience

Enticing Prospects with Options

- Download a Brochure
- Chat with our Team
- Schedule a Visit
- Attend a Virtual Tour

- **Build Your Learning Experience**

- Apply Now



ALCC [Home](#) [About](#) [Programs](#) [Registration](#) [Student Services](#) [Apply Now](#) [Apply as an Agent](#)

Apex Language and Career College

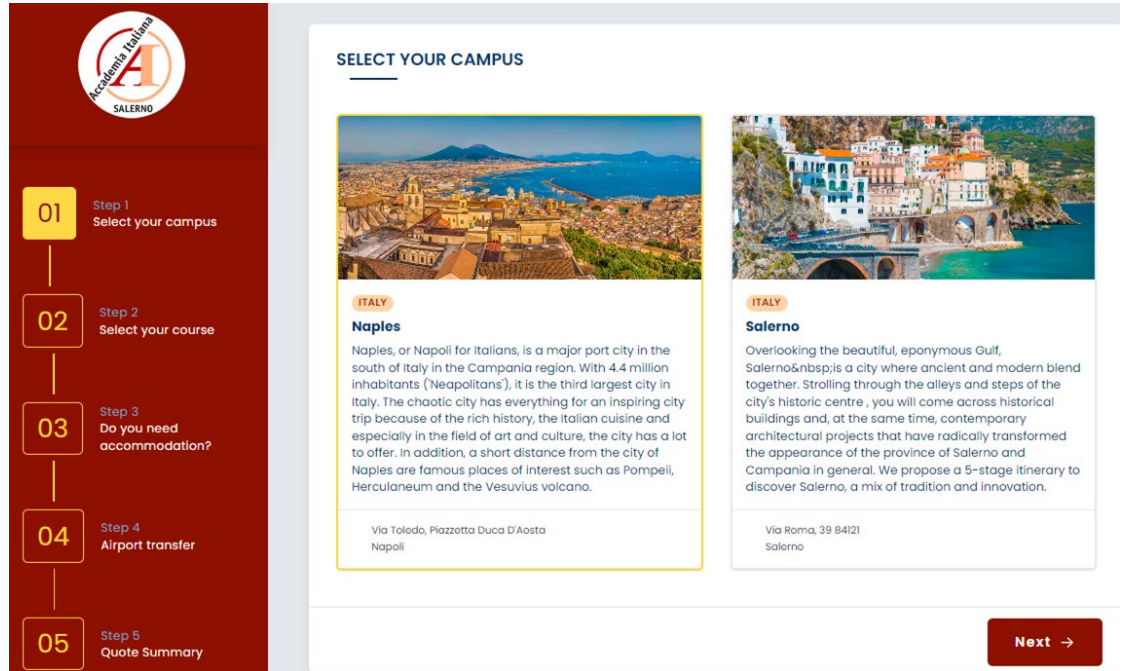
We have been offering pathway programs for over 20 years

[Learn More About ALCC](#)

Featured Courses

Enable Prospects to Customize a Quote

- Allow them to view all campuses,
- View key information
- Make a choice



The screenshot displays a user interface for 'Accademia Italiana Salerno'. On the left, a vertical navigation bar contains five steps: 01 Select your campus, 02 Select your course, 03 Do you need accommodation?, 04 Airport transfer, and 05 Quote Summary. The main content area is titled 'SELECT YOUR CAMPUS' and features two campus options: Naples and Salerno. Each option includes a photograph, a title, a brief description, and a contact address. A 'Next' button is located at the bottom right of the main content area.

Accademia Italiana SALERNO

01 Step 1
Select your campus

02 Step 2
Select your course

03 Step 3
Do you need accommodation?

04 Step 4
Airport transfer

05 Step 5
Quote Summary

SELECT YOUR CAMPUS

ITALY
Naples
Naples, or Napoli for Italians, is a major port city in the south of Italy in the Campania region. With 4.4 million inhabitants (Neapolitans), it is the third largest city in Italy. The chaotic city has everything for an inspiring city trip because of the rich history, the Italian cuisine and especially in the field of art and culture, the city has a lot to offer. In addition, a short distance from the city of Naples are famous places of interest such as Pompeii, Herculaneum and the Vesuvius volcano.
Via Tolodo, Piazzotta Duca D'Aosta
Napoli

ITALY
Salerno
Overlooking the beautiful, eponymous Gulf, Salerno is a city where ancient and modern blend together. Strolling through the alleys and steps of the city's historic centre, you will come across historical buildings and, at the same time, contemporary architectural projects that have radically transformed the appearance of the province of Salerno and Campania in general. We propose a 5-stage itinerary to discover Salerno, a mix of tradition and innovation.
Via Roma, 39 84121
Salerno

Next →

Enable Prospects to Customize a Quote

- Show all program offerings
- They Selects a course
- Select start dates

Accademia Italiana SALERNO

01 Step 1 Select your campus

02 Step 2 Select your course

03 Step 3 Do you need accommodation?

04 Step 4 Airport transfer

05 Step 5 Quote Summary

SELECT YOUR COURSE

Standard Italian Courses	Intensive Italian Courses
Super Intensive Italian Courses	Italian Course for Professionals
Internship Language Preparation	Internship
Individual Italian Courses	reda course

Duration

Start Date* 2023-11-27

End Date* 2023-12-29

← Back Next →

Enable Prospects to Customize a Quote

- Accommodations
- Transport (airport pick-up/drop-off) if needed
- Other local offerings?

Accademia Italiana
SALERNO

01 Step 1
Select your campus

02 Step 2
Select your course

03 Step 3
Do you need accommodation?

04 Step 4
Airport transfer

05 Step 5
Quote Summary

DO YOU NEED ACCOMMODATION?

Do you need accommodation service?

Yes

No

← Back

Next →

Enable Prospects to Customize a Quote

Accademia Italiana SALERNO

01 Step 1 Select your campus

02 Step 2 Select your course

03 Step 3 Do you need accommodation?

04 Step 4 Airport transfer

05 Step 5 Quote Summary

QUOTE SUMMARY

Course information

Campus
Italy - Naples

Course
Standard Italian Courses
4 WEEKS

Durations
November 27th 2023 December 22nd 2023

Accommodation

Shared apartment standard (Naples)
SINGLE ROOM

Durations
N/A

Transfer

N/A

DISCLAIMER This quote valid till December 7th 2023

Receive Summary

PRICING

COURSE	PRICE
Standard Italian Courses 4 WEEKS	1260.00 €
ACCOMMODATION	PRICE
Shared apartment standard (Naples) SINGLE ROOM	0.00 €
DUE TODAY	252.00 €
TOTAL PRICE	1260.00 €

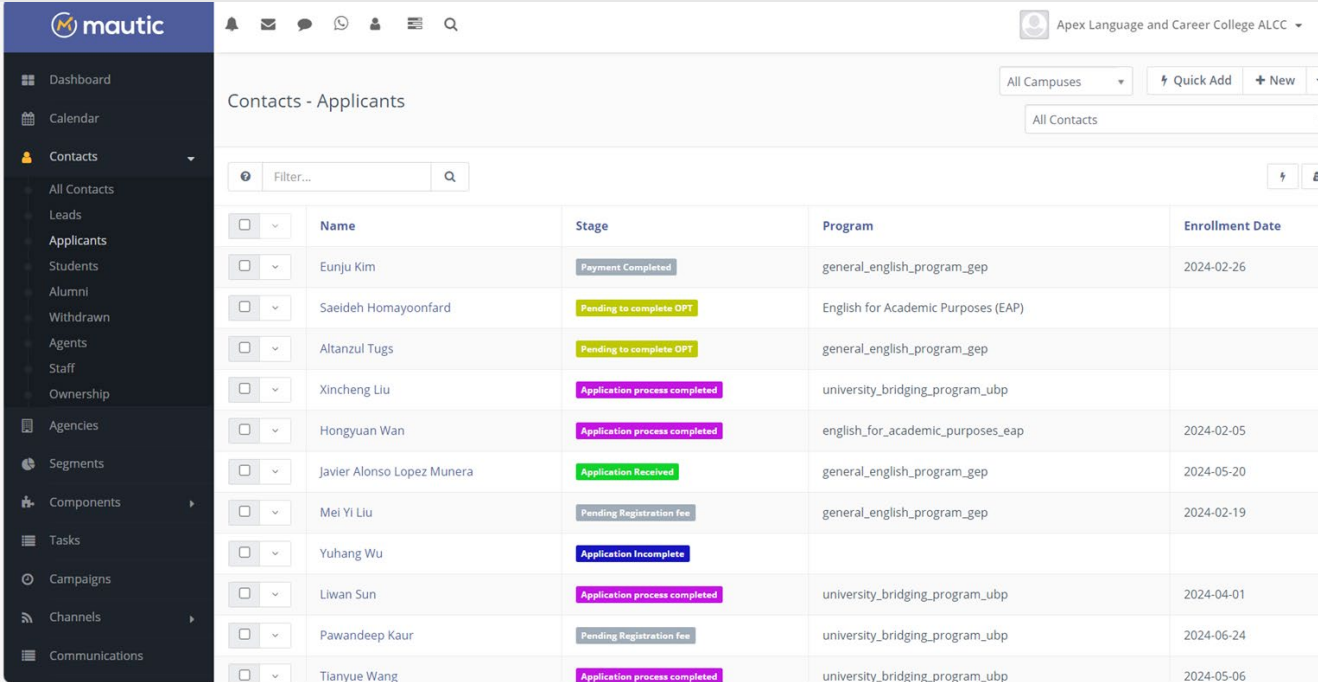
Book Now

Using a CRM

(Customer Relationship Management)

to Nurture Leads to Enrolment

Collect all the Contact Data of our Leads

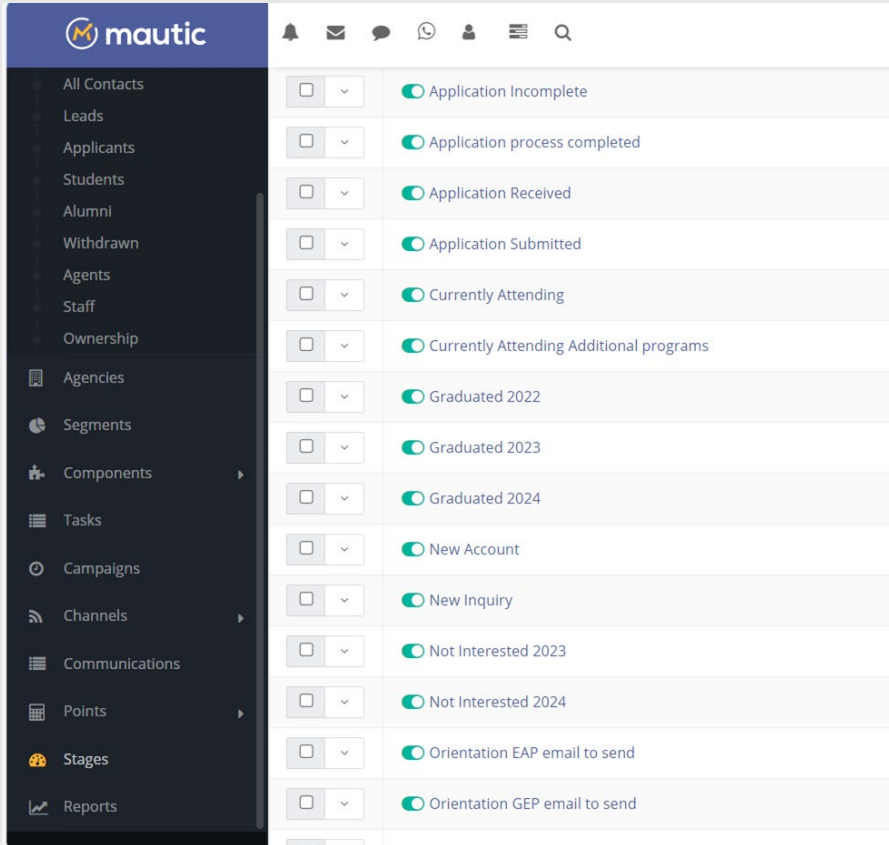


The screenshot displays the Mautic CRM interface for 'Apex Language and Career College ALCC'. The main view is 'Contacts - Applicants'. A table lists 10 contacts with the following columns: Name, Stage, Program, and Enrollment Date. Each contact has a dropdown menu to its left. The stages are color-coded: grey for 'Payment Completed', yellow for 'Pending to complete OPT', purple for 'Application process completed', green for 'Application Received', and blue for 'Application Incomplete'.

	Name	Stage	Program	Enrollment Date
<input type="checkbox"/>	Eunju Kim	Payment Completed	general_english_program_gep	2024-02-26
<input type="checkbox"/>	Saeideh Homayoonfard	Pending to complete OPT	English for Academic Purposes (EAP)	
<input type="checkbox"/>	Altanzul Tugs	Pending to complete OPT	general_english_program_gep	
<input type="checkbox"/>	Xincheng Liu	Application process completed	university_bridging_program_ubp	
<input type="checkbox"/>	Hongyuan Wan	Application process completed	english_for_academic_purposes_eap	2024-02-05
<input type="checkbox"/>	Javier Alonso Lopez Munera	Application Received	general_english_program_gep	2024-05-20
<input type="checkbox"/>	Mei Yi Liu	Pending Registration fee	general_english_program_gep	2024-02-19
<input type="checkbox"/>	Yuhang Wu	Application Incomplete		
<input type="checkbox"/>	Liwan Sun	Application process completed	university_bridging_program_ubp	2024-04-01
<input type="checkbox"/>	Pawandeep Kaur	Pending Registration fee	university_bridging_program_ubp	2024-06-24
<input type="checkbox"/>	Tianyue Wang	Application process completed	university_bridging_program_ubp	2024-05-06

- Started with 5 contacts - leads, applicants, students, agents, alumni
- Added withdrawn, staff, owners
- Custom Stages
- Sub-divide

Create Lists of Categorized Leads



- Added Segments
- for Each Stage in the Journey
- Pending

Contact Profile

Apex Language and Career College ALCC

First Name	
Last Name	
Company	MSVU Agreement
Email	@gmail.com
Phone	
Foreign/Home Country Address	
City	Halifax
Zipcode	B3S 1L1
Country	Canada
Channel	Portal
Lead Status	Warm
Program	university_bridging_program_ubp
Contacted	Yes
Source Type	Form
Gender	Female
Date of Birth	
Request Type	Application
Native Language	Tagalog
Emergency Name	

Student

Stage
Currently Attending

Lead Status
Warm

Enrollment Date
2024-01-08

Campus
ALCC

Contact Type
Student

Agencies
MSVU Agreement

Owner
Apex Language and Career College ALCC

Channel
Portal

Created Date
59 days ago

Last active
Today, 2:19 am

Address









Email


Phone - home

- Student's personal information easily accessible
- Additional information
- Easy to amend/edit

View Files Uploaded During Application

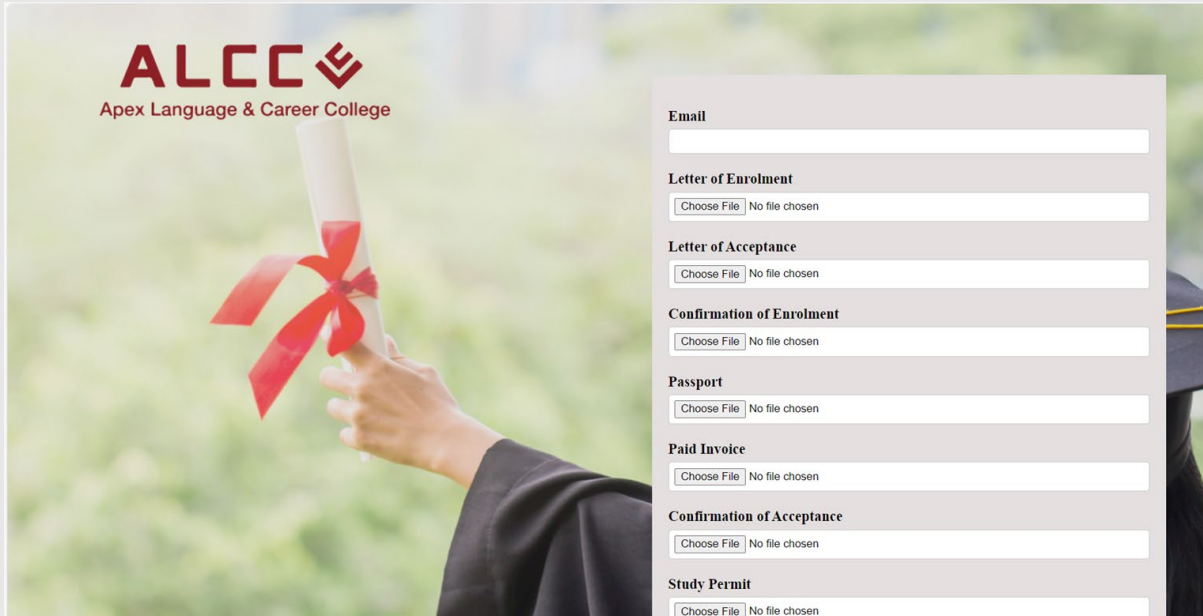
Apex Language and Career

Payment and return policy	yes
Visa Status	student visa
Program Start Date	January 8, 2024
How did you find out about your school - other	Though MSVU
Passport	View File 
Enrollment Date	2024-01-08 
Nationality	Philippines 
Letter of Acceptance	View File 
Letter of Enrolment	View File 
Confirmation of Acceptance	View File 
Paid Invoice	View File 
Study Permit	View File 

 Show empty fields

- Submitted documents
- Issued documents
- An additional to original CRM

Our 'Uploader'



- Not initially part of CRM
- Application and documents in one place
- Link to upload documents to students file
- Identifier is email address

Communication by Phone

The screenshot displays a CRM interface with a navigation bar at the top containing the following items: History (40), Notes (0), Tasks (0), Email History (3), SMS History (2), Whatsapp Messages (0), Call (7), Meetings (0), and another item (18). Below the navigation bar is a search filter box labeled "Filter..." and a "+ Log a Call" button. The main content area shows a call record for "Call - Cyndy Dutkiewicz". The status is "Connected". The call was added on January 25, 2024 at 2:31 pm. The notes indicate: "Taking notes on their interest here" and "Big questions about the dorm!". At the bottom of the call record, it shows the date and time "January 25, 2024 2:30 pm", the user "Scott Cross", and the status "Connected" and "Inbound".

- Log calls to students

Communication by Text

- Feature available
- Not used by ALCC

The screenshot displays a CRM interface with a navigation bar at the top containing the following items: History (40), Notes (0), Tasks (0), Email History (3), SMS History (2), Whatsapp Messages (0), Call (7), and Meetings (0). Below the navigation bar is a search filter box labeled "Filter..." and a "Send SMS" button. The main content area shows a message with the following details:

- Status:** Sent
- Added at:** June 14, 2023 2:16 pm
- Message:** Is your Digital Marketing training plan still relevant? Please note that registrations for the start of the 2021 school year are open! Register here <https://application.crmforschools.net/demo/register>
- Footer:** June 14, 2023 2:16 pm | Scott Cross | Sent | Outbound











Communication by Email

The screenshot displays a dashboard with navigation tabs: History (75), Notes (1), Tasks (0), Email History (9), SMS History (0), Whatsapp Messages (0), Meetings (0), Call (0), and Audit log (19). Below the tabs is a search bar labeled "Filter...". The main content area shows a list of four email entries, each with a left-pointing arrow icon, a subject line, sender information, a "Read All" link, and a timestamp with status indicators (Apex Language and Career College ALCC, Outbound, Automated).

- Reminder - Morning Munchies**
From : info@alcc.ca
Read All
February 15, 2024 1:55 pm Apex Language and Career College ALCC Outbound Automated
- ALCC is closed due to weather today Wednesday, February 14, 2024**
From : info@alcc.ca
Read All
February 14, 2024 5:45 am Apex Language and Career College ALCC Outbound Automated
- Reminder: Curling Activity on Tuesday February 13, 2024**
From : info@alcc.ca
Read All
February 9, 2024 4:21 pm Apex Language and Career College ALCC Outbound Automated
- ALCC is closed Monday February 5, due to weather**
From : info@alcc.ca
Read All

- Easy search for individuals
- Push leads to apply
- Incomplete applications to enrollment
- Information & updates

Communication by Email

<input type="checkbox"/> ▾	 Welcome to the UBP January 2024 🌐	Programs	2 Pending 3 Sent 3 Read 100% Read	87
<input type="checkbox"/> ▾	 GEP Orientation email September 11, 2023 🌐	Uncategorized	3 Pending 5 Sent 5 Read 100% Read	34
<input type="checkbox"/> ▾	 GEP Orientation email Oct. 23, 2023 🌐	Programs	4 Sent 4 Read 100% Read	47
<input type="checkbox"/> ▾	 GEP Orientation email 2023 🌐	GEP Orientation email	2 Sent 2 Read 100% Read	51
<input type="checkbox"/> ▾	 GEP Orientation email Nov. 13, 2023 🌐	Programs	1 Pending 4 Sent 3 Read 75% Read	62
<input type="checkbox"/> ▾	 Welcome to the GEP February 20, 2024 🌐	GEP Orientation email	2 Sent 2 Read 100% Read	113
<input type="checkbox"/> ▾	 Welcome to the GEP January 8, 2024 🌐	Uncategorized	2 Sent 2 Read 100% Read	88
<input type="checkbox"/> ▾	 Welcome to the GEP February 5, 2024 🌐	GEP Orientation email	2 Sent 2 Read 100% Read	104
<input type="checkbox"/> ▾	 Welcome to EAP January 2024 🌐	Programs	4 Sent 4 Read 100% Read	89
<input type="checkbox"/> ▾	 Email 3: Application Incomplete Follow Up	Application	11 Sent 9 Read 81.82% Read	28

- Email by group (segment)
- Campaign emails for conversion
- Know % viewed

Show All Communication History

75 History 1 Notes 0 Tasks 9 Email History 0 SMS History 0 Whatsapp Messages 0 Meetings 0 Call 19 Audit log

Q Filter...

Include events by source Exclude events by source Export

	Event Name	Event Type	Event Timestamp
✉	Reminder - Morning Munchies	Email read	Yesterday, 2:07 pm
✉	Reminder - Morning Munchies	Email sent	Yesterday, 1:55 pm
+	Contact added to segment, Students GEP, EAP & UBP	Segment membership change	Yesterday, 1:43 pm
✉	ALCC closed due to weather today Wednesday, February 14, 2024	Email read	February 14, 2024 5:46 am
✉	ALCC closed due to weather today Wednesday, February 14, 2024	Email sent	February 14, 2024 5:45 am
✉	Curling Club Tuesday February 13, 2024	Email read	February 9, 2024 10:14 pm
✉	Curling Club Tuesday February 13, 2024	Email sent	February 9, 2024 4:21 pm
+	Contact added to segment, All STUDENTS	Segment membership change	February 9, 2024 4:12 pm
+	Contact removed from segment, UBP 6 Students February 5, 2024	Segment membership change	February 9, 2024 3:58 pm
+	Contact removed from segment, All New UBP Students January 2024	Segment membership change	February 9, 2024 3:58 pm

- Confirming if something went out to them - was read and viewed
- Confirmation who group emails were sent to
- Did someone unsubscribe?

Lead Nurturing via Communications

- More aesthetically pleasing than generic email
- Send automated replies
- Follow-up via email, WhatsApp, SMS, or phone calls
- Build rapport and a more meaningful relationship with high-qualifying leads

ALCC 
APEX LANGUAGE AND CAREER COLLEGE

Hello (First Name),

Congratulations on completing your application and paying the registration fee! You will now need to complete the ALCC placement testing. This consists of two parts:

1. Online placement test
2. Virtual meeting

PART 1: OPT

Please find attached the instructions for the Oxford Online Placement test.

- The instructions include a username and password to access the test.
- This is an 80-minute test that has two parts. The first component focus on English Usage (reading, vocabulary and grammar), while the second component focuses on Listening.
- Students should take as much time as you need without going over the limit.

PART 2: INTERVIEW

Once the OPT is completed, please book an interview.

- Please book a time using the link provided and choose 'Placement Test Interview': <https://outlook.office365.com/owa/calendar/RaniaGhaly@alcc.ca/bookings/>
- The slots are presented in local time and will be a virtual meeting via Teams.
- The test will consist of a speaking assessment and a writing task to be completed during the meeting.
- Students must have their camera on during the interview and have a paper and pen for the writing task.

Regards,

you received this email because you are subscribed to emails from:



Apex Language & Career College

Phone: +1 (902) 446 1818

E-mail: info@alcc.ca

1526 Dresden Row Suite 205

Halifax, Nova Scotia, Canada, B3J 3K3



UNSUBSCRIBE

Erika's insights CRM

From the perspective of Admissions:

- user-friendly
- easy to access
- access data by:
 - date range
 - program
 - start date
 - payment
- able to track student's journey
- efficient data collection for:
 - conversion rates
 - outreach plans
 - communication strategies
 - reports

Simplifying the Application Process

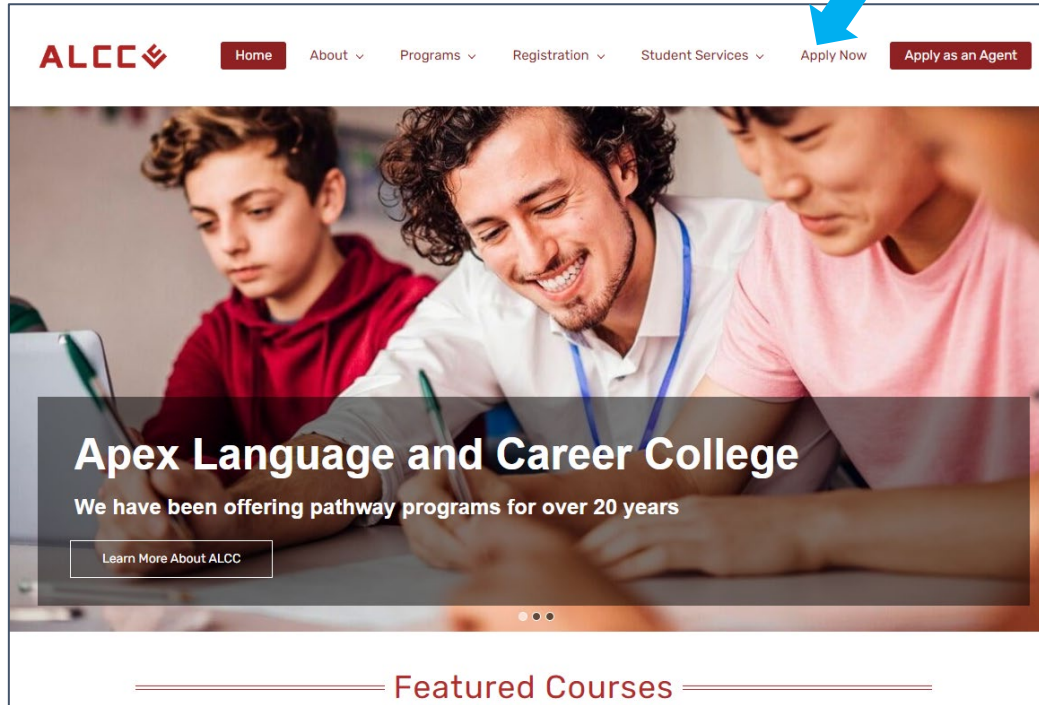
Audience Poll #3

**What are issues your school
has had with receiving
applications over the years?**



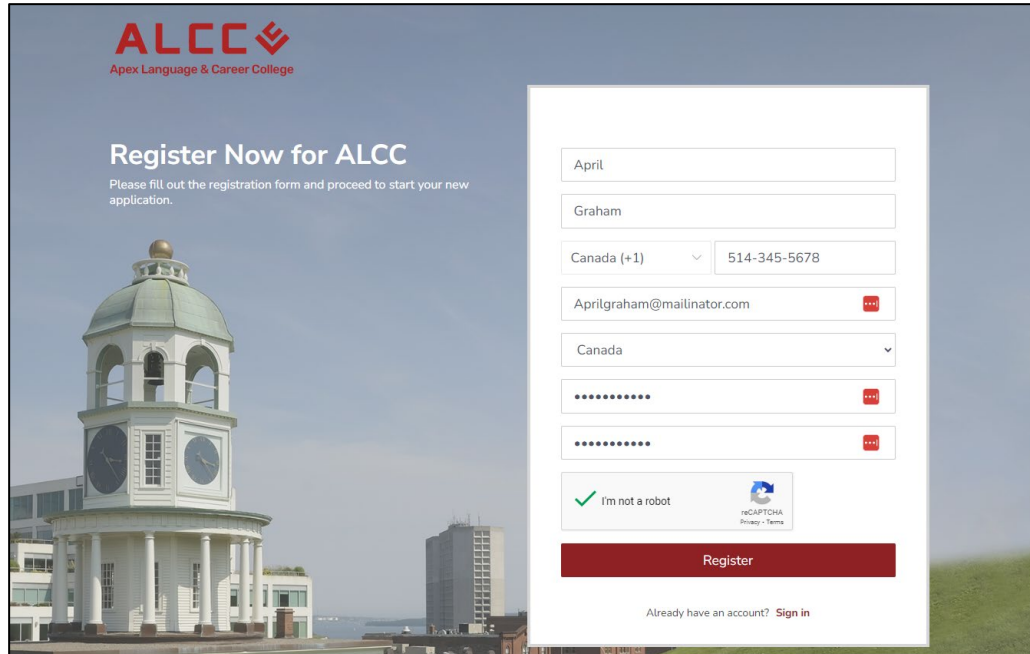
GO TO [menti.com](https://www.menti.com) CODE 34 05 60

Make it Easy to Apply



- Meet student expectations
- Match your competitors
- Not an online form
- Data sits in your website
- Not a PDF download

Make it Easy to Apply



The image shows a registration form for ALCC (Apex Language & Career College). The form is overlaid on a background image of a building with a clock tower. The form includes the following fields and elements:

- ALCC Logo: Apex Language & Career College
- Section Header: Register Now for ALCC
- Text: Please fill out the registration form and proceed to start your new application.
- First Name: April
- Last Name: Graham
- Country: Canada (+1)
- Phone Number: 514-345-5678
- Email: Aprilgraham@mailinator.com
- Country: Canada
- Password: [Redacted]
- Confirm Password: [Redacted]
- reCAPTCHA: I'm not a robot
- Register Button
- Link: Already have an account? Sign in

- Registration process allows user to create an account

Username:

Password:

- They can save their progress at any stage, log out, and resume where they left off.

Make it Easy to Apply

The screenshot shows the ALCC Online Application interface. At the top, the ALCC logo (Apex Language & Career College) is displayed. Below it, a navigation bar shows seven steps: 1. Personal information (highlighted), 2. Program, 3. Medical Information, 4. Endorsement Policy, 5. Payment Information, 6. Documents, and 7. Submission. The main form area is titled 'Personal information' and contains the following fields:

First Name *	April	Last Name *	Graham
Email *	Aprilgraham@mailinator.com	Date of Birth *	
Gender	--Select--	Phone Number	514-345-5678
Street Address *		City *	
State/Region/Province *		Postal/Zip Code *	
Country *	Canada	Nationality	--Select--
Native Language		Visa Status	--Select--
Emergency Contact Name		Emergency Telephone	
Emergency Email			

At the bottom right of the form, there are two buttons: 'Previous' and 'Save and Continue'.

- As many steps as you need
- Customize the fields you require in each step

Make it Easy to Apply


The screenshot displays the ALCC Online Application interface. At the top, the ALCC logo (Apex Language & Career College) is visible. Below it, a progress bar shows seven steps: 1. Personal information, 2. Program, 3. Medical Information, 4. Enrollment Policy, 5. Payment Information, 6. Documents, and 7. Submission. Step 2, 'Program', is currently active. The form contains several fields:

- Programs ***: A dropdown menu with 'English for Academic Purposes (EAP)' selected.
- How long would you like to study? ***: A text input field containing '20', with a small note below it: '# of weeks registering'.
- Start Date at ALCC ***: A date input field containing '04/2024', with a note below it: 'For University/College (mm/yyyy)'.
- Which partner University/ College will you attend?**: A text input field containing 'Univ. of King's College'.
- Have you taken an English language proficiency test?**: A dropdown menu with 'No' selected.
- Date taken**: A date input field with a note below it: '(mm/yyyy)'.
- Available Services**: A dropdown menu with 'Homestay placement' selected.
- How did you find our school?**: A dropdown menu with 'Internet' selected.


At the bottom right of the form, there are two buttons: 'Previous' and 'Save and Continue'.

- You choose which data fields you want within each step
- Mark some as *Required

Make it Easy to Apply

☰

Online Application



1 Personal Information 2 Program 3 Medical Information 4 Enrollment Policy 5 Payment Information 6 Documents 7 Submission

1. **Visa Requirements:** Students planning to extend their studies for longer than 6 months must apply for a student authorization. Obtaining the necessary information and valid study permit is the responsibility of the student.

2. Once an acceptance letter has been issued, it is the student's obligation to come to the registered program on the first day and thereafter. The school is required to inform immigration authorities if the student fails to report to school on the program start date.

3. **Attendance Requirements:** Attendance records are carefully kept at the school for all students. Any failure to come to school without an acceptable reason is not allowed. A poor class attendance rate can affect your status as a full-time international student in Canada.

4. **Liability:** ALCC is not liable in any way to the students for any personal injury, or loss of / damage to property

I have read and understood the Enrollment Policy. I accept the terms and conditions.

1. To complete the registration process, you must complete the application form, pay the registration fees, submit a copy of a valid passport and either complete a placement test or submit the results of a recent language proficiency test.
2. Once your application has been processed, you will receive a letter of acceptance with your study plan and fees due for your registered classes and/or services.
3. You can pay these fees by credit card via Flywire, email money transfer through a Canadian bank account or by in-person by cash or personal check. Banking and other payment information can be found below and on our website.
4. After receiving the payment of fees for your registered classes, ALCC will send you receipt, confirmation of acceptance (for visa purposes) and an official letter of enrolment (for college and university conditional admission) via e-mail.
5. All homestay applications should be made at least one month before your arrival to ensure enough time to process your request. ALCC cannot guarantee that all homestay preferences will be met

I have read and understood the Registration Procedure. I accept the terms and conditions.

Previous Save and Continue

- Add “Terms of Agreement”

Make it Easy to Apply



Online Application



1. Upon acceptance to the program, students must pay the tuition fee for the first term in full and a 20% deposit for the subsequent terms they wish to sign up for.
 2. If a student has been denied a visa or study permit, ALCC will refund tuition fees paid, less a \$100 administration fee. A copy of the letter stating the visa denial from the immigration authority must be provided to ALCC before such refunds can be made.
 3. Until the start date of the program, students who notify ALCC of their withdrawal in writing will receive a refund of their tuition fees paid, less a 20% non-refundable and non-transferable deposit.
 4. There is no refund after the start date of the program.
- I have read and understood the Payment and Refund Policy. I accept the terms and conditions.

If you do not understand how to proceed with any of the payment methods below, please click the following link and read the respective descriptions:

Payment Methods

--Select--

--Select--

Cash

Personal check

Wire transfer

Credit/Debit card

Email Money Transfer

Reserved by ALCC.

Previous

Save and Continue

- Collect Application Fee
- Online Payment

Make it Easy to Apply



Online Application



Please upload a copy of the documents below:

(Either as a file or image)

Passport

Drag & Drop Files

Letter of Acceptance

Drag & Drop Files

Letter of Enrolment

Drag & Drop Files

Confirmation of Acceptance

Drag & Drop Files

Confirmation of Enrolment

Drag & Drop Files

- Allow applicants to Upload documents

Make it Easy to Apply



Online Application



By signing below, you agree to the following terms:

- I have read both the Enrollment Policy and Payment & Refund Policy of ALCC.
- I understand that my study status and attendance will be disclosed to scholarship, education or immigration authorities.
- I give permission for my photograph, videography and / or testimonial to be used in ALCC promotional material.



Reset Signature

Date of Signature

2024-02-02

February 2024						
Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	1	2
3	4	5	6	7	8	9

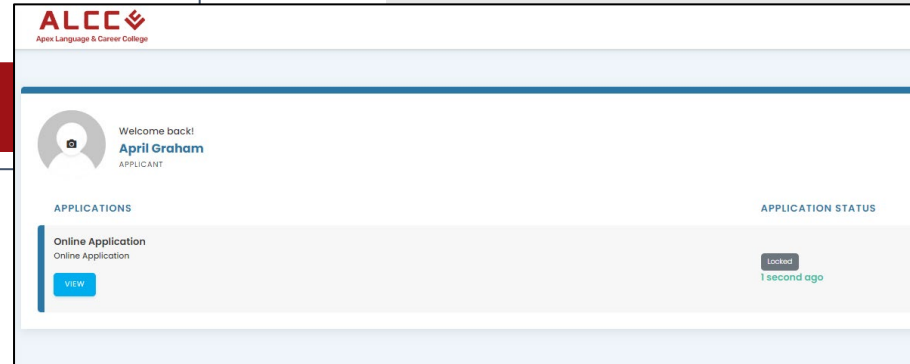
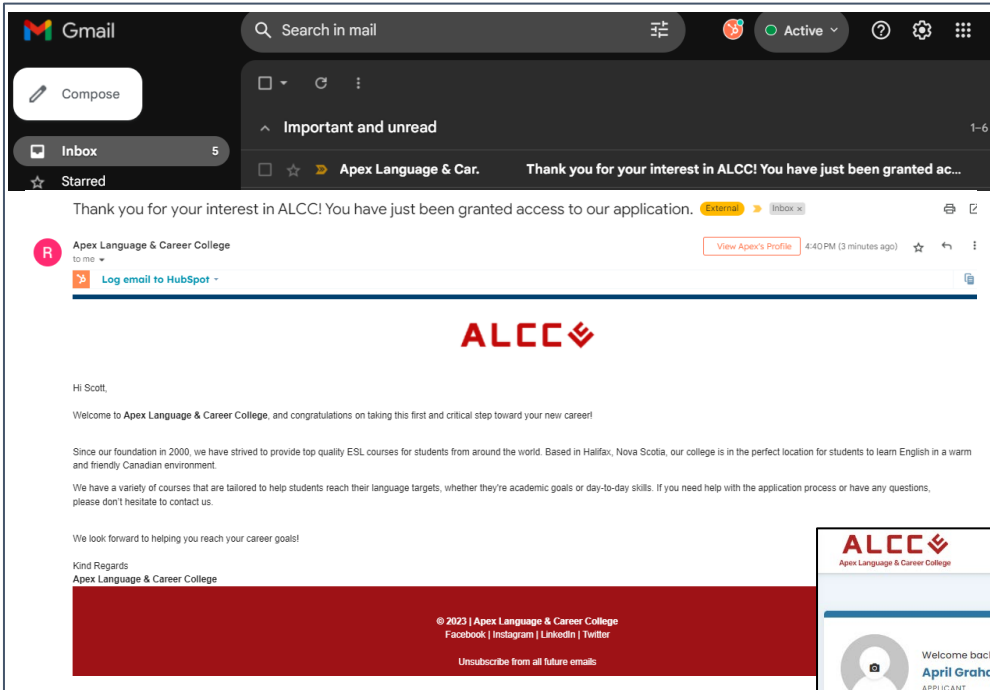
Previous

Submit Application

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- Collect Signature
- Docusign or AdobeSign

Email Notification



Add Your Agents



- Invite agents to create an account in your Application System

Add Your Agents

The screenshot shows the 'Recruiters Hub' interface. At the top right, there are two buttons: 'Agents Login' and 'Add New'. Below the header, there is a search bar with a dropdown menu set to '10' and a search icon. The main content area is a table with columns for 'AGENCY', 'STUDENTS', and 'AGENTS'. The table contains two rows of agent data.

<input type="checkbox"/>	AGENCY	STUDENTS	AGENTS
<input type="checkbox"/>	HEM Agency agency@hem.com	2	1
<input type="checkbox"/>	Student Plus qiju@mailinator.com	14	1

- Track your agencies and their agents.
- See how many applications they have generated

Agents Submit Application

Manuel Attallah
student@hotmail.com

Applicant No Campus No Owner HEM Agency (MICHEL ATTALLAH)

Recent transaction: Invoice - 150.00 CAD

Address

Impersonate

PROFILE APPLICATION SUBMISSIONS SUBMISSION HISTORY FILES FINANCE CONTRACTS DOCUMENTS MESSAGES

APPLICATION FORM

Diploma Program 635

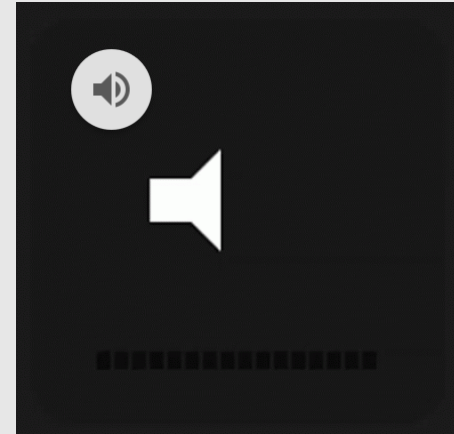
Created: May 19, 2023 Updated: May 19, 2023 Step: 4

SUBMISSION STATUS

Locked

- Agent can fill it out
- OR
- Agent can sent to student
- Track by agent
- Agent can “Impersonate” Student by filling in missing sections

Another Word from Erika



Optimizing for Success by Tracking Performance

Reporting on Progress

- See applications in one system
 - Quote Builder
 - Virtual Admissions Assistant
 - Online Applications
- Filter by:
 - Source
 - Status
 - Contact Type
- Reverse-engineer:
 - Select those who have started but not completed applications

Filters

Application Forms 3

Select all

Diploma Program

Diploma Application Forms

VAA Application

Contact Type

APPLY

Filters

All selected 3

Status of Applications 5

Select all

Visa Documents Incomplete

Visa Documents Submitted

Approved

Rejected

Discovery

Admission Documents Incomplete

Missing Documents

Locked

Filters

All selected 3

Visa Documents In... 5

Progress of Applications 3

Select all

< 25%

25% - 50%

50% - 750%

75% - 100%

Reporting on Progress

- Filter results show all those who have started, but not completed applications
- This becomes a follow-up list of *very interested* perspective students

NAME	CAMPUS	APPLICATION	PROGRAM	RECENT TRANSACTION	APPLICATION STATUS	PROGRESS STATUS	CONTACT TYPE
John Hemtest		Diploma Program		Invoice - 150.00 CAD	Updated	<div><div style="width: 25%;">25%</div></div> APP STEPS: 1/4	Applicant
Boris Rewind		Diploma Program		Invoice - 150.00 CAD	Account Created	<div><div style="width: 25%;">25%</div></div> APP STEPS: 1/4	Applicant
Faith Zimmerman		Diploma Program		Invoice - 150.00 CAD	Updated	<div><div style="width: 75%;">75%</div></div> APP STEPS: 3/4	Applicant
Test Name		Diploma Program		Invoice - 150.00 CAD	Locked	<div><div style="width: 25%;">25%</div></div> APP STEPS: 1/4	Applicant
Raven Phillips		Diploma Program		Invoice - 150.00 CAD	Account Created	<div><div style="width: 25%;">25%</div></div> APP STEPS: 1/4	Applicant
Driscoll Jacobs		Diploma Program		Invoice - 150.00 CAD	Updated	<div><div style="width: 25%;">25%</div></div> APP STEPS: 1/4	Applicant
Isabelle Morton		Diploma Program		Invoice - 150.00 CAD	Updated	<div><div style="width: 75%;">75%</div></div> APP STEPS: 3/4	Applicant

Reporting on Progress

- Create CRM Reports tracking Enrollments by:
 - Request Type
 - Lead Source
 - Program
 - Campus

Leads Conversion - Request Type

Request Type	Total	New Inquiry	Meeting Booked	Meeting Held	Enrolled
Landing Page Form	177	14 (7.9 %)	40 (22.6 %)	50 (28.2 %)	20 (11.3 %)
Landing Page - HEM	32	10 (31.3 %)	2 (6.3 %)	0 (0%)	4 (12.5 %)
Contact Us Form	27	2 (7.4 %)	6 (22.2 %)	5 (18.5 %)	3 (11.1 %)
Website Brochure Form	75	3 (4 %)	20 (26.7 %)	11 (14.7 %)	10 (13.3 %)
Paid Ads Form	122	4 (3.3 %)	28 (23 %)	19 (15.6 %)	16 (13.1 %)
Book a Meeting Form	38	1 (2.6 %)	10 (26.3 %)	10 (26.3 %)	3 (7.9 %)
Event Form	59	0 (0%)	10 (16.9 %)	10 (16.9 %)	10 (16.9 %)
Application Portal	199	0 (0%)	1 (0.5 %)	0 (0%)	1 (0.5 %)
Book a Meeting	1	0 (0%)	1 (100 %)	0 (0%)	0 (0%)
N/A	24	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Quote - English Language and Activity Programme	4	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Total	758	34 (4.5 %)	118 (15.6 %)	105 (13.9 %)	67 (8.8 %)

Real-world Insight on the Benefits Reporting

From the perspective of Management:

- big picture
- leads to conversion
- pitfalls - action plan
- communication plans
- recruitment strategies

Takeaways

- Offer Calls to Action that meet a prospect at every stage of the search
- Offer engaging ways to inquire at these critical stages
- Meet student expectations at Inquiry, Communication, and Application Stages
- Plug in your Agents allowing them to Apply Online for their students
- Measure what's working; Who should I follow-up with?; How can we be more efficient?



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