



November 2008

## ***Catholic School Enrollment Talk***

ISPD is your Catholic School Enrollment Solution for maintaining and/or increasing the quantity, quality, or diversity of your elementary or secondary Catholic school enrollment.

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### **Customer Relationship Management (CRM) and Your School**

**By John Cooper, ISPD Enrollment Specialist**

Customer Relationship Management (CRM) technology is very important for your Catholic school. Post-it notes, notebooks, and file folders with names and addresses of prospects are just not going to take your school's enrollment management program to the level that it needs to be over the long haul. If you are using an Excel spreadsheet or an Access database, you are moving in the right direction. However, Excel and Access fall short of what a CRM database can do for your school's enrollment.

There are many types of CRM databases on the market. Those of you who have attended an ISPD enrollment workshop will recall that I recommend the ACT database by Sage as robust, user-friendly, and cost effective for most elementary and high schools. I have no idea just how many Catholic schools are using a CRM database such as ACT at this point. Please email me at [jcooperispd@aol.com](mailto:jcooperispd@aol.com) to let me know what you are using.

### **What Does a CRM Database Allow You To Do?**

**CRM does the following:**

1. It allows you to enter and record important information relative to a prospect easily onto what the technology folks refer to as a "gooey" screen e.g. a screen with data fields laid out in a user-friendly format. This information can range from mundane basic contact information to more strategic information such as how they learned about the school.
2. It allows you to schedule an activity series of intentional, proactive contacts with them. You can "alarm" these activities so that a program like ACT flashes a message on the screen alerting you that the activity is due. For instance, it could tell you that a contact needs a phone call, a letter, or an email.
3. Once you "clear out" the activity that is scheduled, the activity is recorded in the contact's history. Used to its fullest, you could go back after a campaign to recruit your kindergarten

or 9th grade classes and study exactly how many proactive and reactive contacts you had with prospects in helping them to make the decision to enroll. What do I mean by reactive contacts? By reactive, I mean those that you record each and every time you react to a prospect's phone, email, or walk-in contact with you. You will probably be surprised just how many proactive and reactive contacts you need to have with the average prospect before they enroll.

4. You need to access prospect data quickly. A good CRM tool like ACT allows you to look up prospects based on a variety of variables. Let's say that you are a high school that has made every effort to find out the interests of your prospective 8th graders as they attend open house, shadow, or otherwise make contact with you. With this information at your finger tips using the CRM's lookup function, you could tailor intelligent, proactive contact with prospects. What do I mean by intelligent? I mean that good CRM allows you to be more intelligent with the content of your message to prospects. Rather than simply "dripping" content out to prospects that may or may not have any relevance to them.
5. You need to know your enrollment funnel numbers. CRM databases like ACT allow you to create prospect groupings. You can have a group of kindergarten prospects. Within that group, you can have sub-groups of how many of those kindergarten prospects have inquired, applied for admission, applied for financial aid, took a placement test, enrolled, deposited, or withdrew their interest. With these groups and sub-groups, you can go in weekly, bi-weekly, or monthly and run enrollment reports that measure how you are doing at this particular point in the recruitment cycle. If you warehouse these reports, then you can do year-to-date comparisons.
6. CRM databases like ACT can be set up to accept live feeds into the database from online inquiry forms. This means if someone is at your school web site and submits an online inquiry form, the data from this form can be set up to go right into the ACT database without the need to data enter the inquiry's information.
7. Having the right mix of contacts is essential to your recruitment effort. A CRM database allows you to set up a blend of snail mail, email, and telephone contact. If you want to send out HTML, graphically rich, personalized emails, you can use email delivery tools such as Swift Page. I mention Swift Page because it works with a CRM like ACT so that the email activity is automatically updated in the prospect's historical record.
8. CRM's are set up to easily allow you to import or export data. From a spreadsheet you can import data into a CRM like ACT. You just need to match up fields in the spreadsheet with fields in the database. I recommend that schools use a CRM to bring a prospect to the point of enrollment. At the moment of enrollment, a prospect's data can be exported into the school's regular student database. Use a CRM for what it is intended, namely, to build the type of dynamic relationship (on the front-end) with a prospect that leads them to enroll. Don't try and use a CRM for billing, scheduling, or grading, if you already have a database to serve those purposes. Keep in mind that a CRM can be used to build relationships with alumni, volunteers, and donors.

If you have a database in your parish or school, determine whether it can perform easily and effectively the CRM type functions listed above. What do I mean by effective CRM? The database needs to be user friendly in terms of entering prospect data, retrieving prospect data, working with prospect data, setting up a series of proactive contacts, and prompting you when to deploy that series of contacts.

We have put together an ACT user's group in Yahoo for Catholic schools. If you would like to be invited to join this Catholic school ACT user's group, please email me with your interest at [jcooperispd@aol.com](mailto:jcooperispd@aol.com).

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## Why Do We Need Enrollment Management

## in Our School?

After a diocese-wide enrollment management workshop, a principal emailed me to say that she was getting "push back" from her faculty on why enrollment management was needed in their school. This particular school has waiting lists for classes (great situation to be in today). She understands the need to do enrollment management in the good times as well as in the not so good times. Maybe you are getting some "push back" related to the need for doing enrollment management.

### **Here's what I think your response should be:**

Enrollment management should be practiced in schools regardless of the enrollment numbers.

Quality enrollment management is performed for two reasons.

- First, in the short term you need the right quality, quantity, and diversity of students enrolled to teach in the way that you want to teach (quality), to make budget (quantity), and to make sure that you are living out the Church's teaching on social justice (diversity).
- Second, in the long term you need to implement enrollment management best practices because it's the right thing to do. Choosing an education for a child is one of the greatest decisions that a parent needs to make. It should be a well informed, well thought out decision. At the heart of Catholic social teaching, we say that every person is a child of God and therefore should be treated with dignity and respect. If you do enrollment management well, you will not only enroll and retain more students, you will be treating people with the dignity that they deserve.

### **Case in point.**

If I called your school today and said that I have a child that I am looking to enroll, then everything you and your staff/faculty/volunteers do either affirms my dignity or treats me like I am just another number on a list. As Catholic schools, we evangelize each and every day by what we say and don't say, by what we do and don't do. Evangelization is not something that you can pull out when you think you need it. Evangelization is a way of life, a way of being Christ-like. In a Catholic school evangelization gives meaning to our enrollment management activity. Do I hear an Amen?

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## Spiritual Thought

If all we thought you were selling is a product like "soap", then we wouldn't be doing what we are doing as a Catholic consulting firm. Your school (including the faculty/staff/volunteers) is providing a ministry that you all should hope touches everyone in a profound way. Enrollment management is a key to how you "touch" people with your ministry. Seen in its wider context, enrollment management is one of the tools for building the Kingdom of God.

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## **Join Us for an ISPD Webinar on Nov 24** *"Getting Your Parish and/or School Ready for a Capital Campaign"*

Monday, November 24, 2008  
10:00 AM - 11:00 AM CST

Today, many Catholic institutions are faced with a perplexing challenge: the need to launch a capital campaign in order to fund facilities and/or endowments and at the same time, trying to do this in the present economy with which all potential donors continue to struggle.

This ISPD Webinar will walk you through the steps of readiness that are needed in order to launch a successful capital campaign.

**Space is limited.**

Reserve your free Webinar seat now at:

<https://www1.gotomeeting.com/register/347077634>

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## Fall 2008 Workshops for Schools

Dynamic presenters share proven strategies and discuss Catholic school enrollment issues. These workshops are conveniently held across the country at an affordable price of \$75-99. We hope you'll join us soon!

[Register on-line](#)

or call us today at 1-800-299-2393

### TOPICS INCLUDE:

- Catholic School Enrollment Solutions - Strategies That Deliver Immediate Results
  - Best First Steps to Take in Beginning Your Catholic Development Efforts
    - Best First Steps / The Annual Fund
  - Capital Campaigns That Produce Results
    - Long Range Planning
  - Customer Service in Your Catholic School
  - Charge Up Your Development Battery

### ISPD Also Conducts On-Site Workshops

Offered to Catholic schools and parishes within a single diocese, these workshops are designed to meet your specific needs.

- [Check Here for Fall 2008 Schedule and More Information on ISPD Development Training Workshops](#)

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## Development Directions

*Development Directions* is our free monthly online newsletter for anyone engaged in the ministry of Catholic development. Hear about success stories in your neighboring schools and parishes that will give you the confidence to take the first step necessary towards successful development.

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- An Introduction to Long-Range Planning for Catholic Parishes
- An Introduction to Long-Range, Strategic Planning for Catholic Schools

- An Introduction to ISPD's Total Stewardship Process
- Creating the Strategic Plan for Development for Parishes and Schools
- Inviting, Involving, and Engaging More People into the Life of Your Catholic Parish
  - Getting Ready for a Capital Campaign, Part I
  - Implementing a Capital Campaign, Part II

To receive your free 15 minute DVD, please visit the [Resource Center](#) on our website.

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Please feel free to forward this newsletter to anyone you think could benefit from this information. If there are any topics you would like to see covered in a future newsletter, please contact us.

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