

# Choosing the Right CRM for Your Childcare Organization

*The Ultimate Guide and Checklist*



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# What is a CRM...

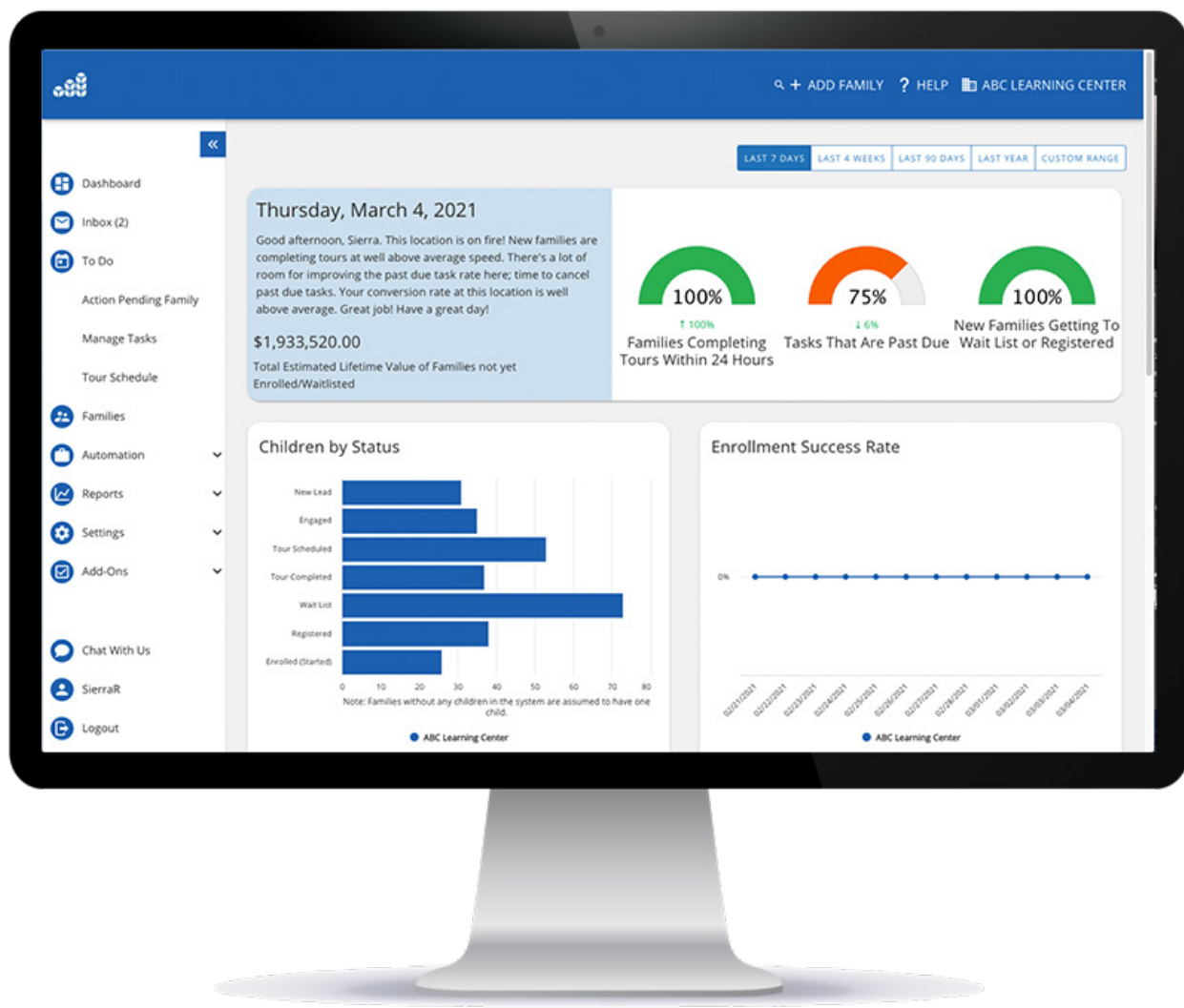
CRM stands for 'Customer Relationship Management'. CRM software helps you grow your childcare organization. With the right CRM, you can automate marketing communications, simplify task management, get real-time reporting, and manage your family pipeline.

CRM software helps you gather data from multiple sources to provide you with a comprehensive view of a family and any past communications you've had with them. This insight allows you to build long-lasting, meaningful

relationships that can help you stand out from other childcare centres in your area.

**Businesses that utilize a CRM see a 47% higher customer retention rate than those who do not.**

*CRM Magazine*



*Pictured above: the homescreen of ChildcareCRM, depicting tasks past due, tour completion rate, family conversion rate, children by status, and enrolment success rate.*

# Why is Having a CRM Essential to Your Childcare Organization...

Managing childcare sales and marketing without the right software is frustrating. Leads and follow-up slip through the cracks. Oversight, accountability, real-time visibility into the metrics are hard to come by when you are trying to grow your childcare organization.

## CRMs versus Pen, Paper, and Spreadsheets

Many childcare organizations still manage new enquiries with pen and paper or spreadsheets. This often results in inconsistent, slower follow up and opportunities being missed. In a recent study, ChildcareCRM found that the childcare centre that follows up with a prospective family first has an 80% higher likelihood of gaining that enrolment. By using a CRM to manage new enquiries and family contacts, you can automate marketing communications saving you hours of manual management.

**The childcare centre that follows up with a prospective family first has an 80% higher likelihood of gaining that enrolment.**

*ChildcareCRM*

This software is user friendly and is easy for me to manage across the 2 centres without even being there. When scheduling tours with other managers at both centres I find that they can easily have all the information at a click of a button that they require. Childcare CRM is great for ensuring we are **touching base with all families** right from when they first enquire, to scheduling a tour, then continuous communication whilst on the waiting list.

*– Enrolment Team*

*The Brooks & The Pocked Early Education and Care*

## The Benefits of an Industry-Focused CRM

There are several large CRM solutions in the market that are loaded with features designed to meet everyone's needs. These can be a great solution for companies like Amazon that are involved in dozens of industries but may not be the best fit for someone like you, a childcare professional working within a very specific field.



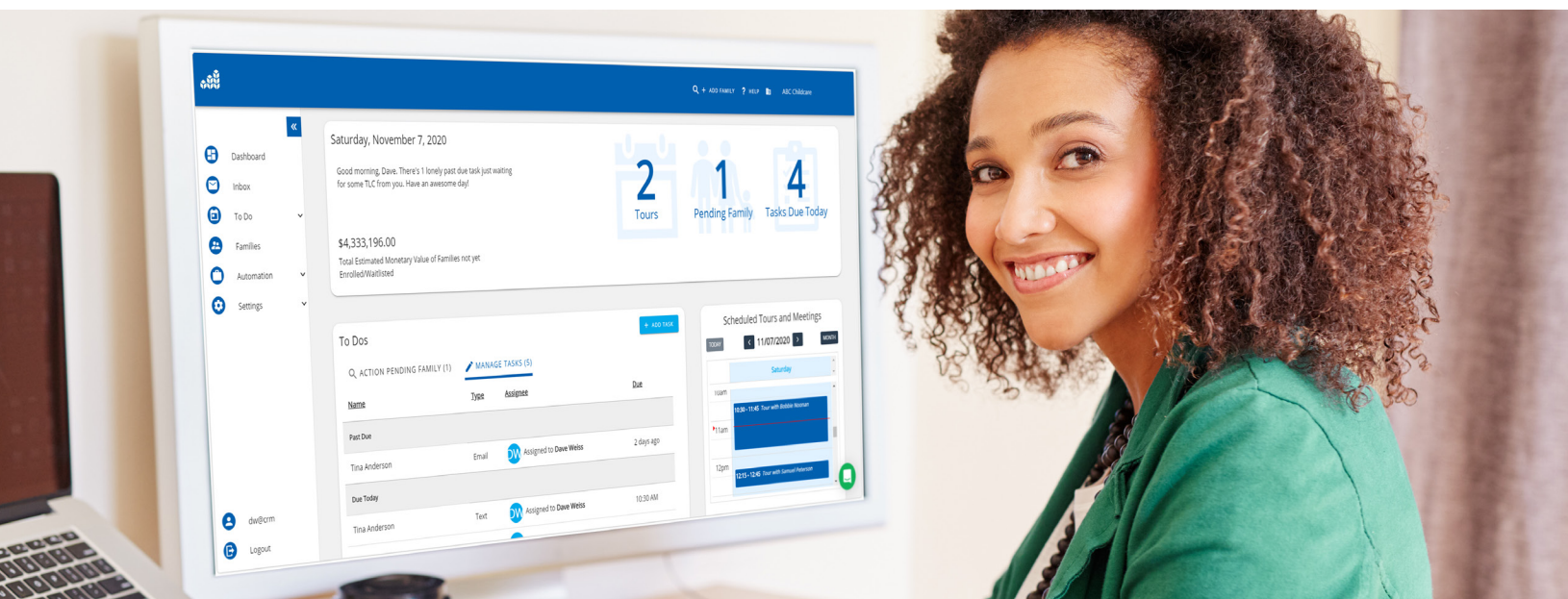
A great CRM should be designed for the childcare industry to help you manage new enquiries, tours, waitlist families, enrolment. It should be purpose-built for the business of childcare, from pipeline management, workflow, email communications and software integration.

A great CRM should also be powerful enough to eliminate extra hours of work to help you and your team do more in less time. Your days are more than busy, so you can't afford to waste time focusing on inefficient processes or redundant tasks that can be automated with the right tool.

Today, everything around us is digital from our phones to Amazon and Door Dash. Parents expect that same fast, convenient experience from their childcare provider. An industry-focused CRM will help you respond to enquiries faster and stay connected through text and email messaging—the communication medium of choice for today's millennial parents.

### Other key benefits of an industry-focused CRM include:

- Increased enrolment
- Real-time insights across childcare centres
- Standardize marketing through automation
- Reduced staff turnover and decreased new employee learning time
- The ability to run detailed & customized marketing campaigns
- Improved communication & connection with families
- Create business rules that are fit for your unique centre & families
- Ability to nurture your family's early learning journey





## Who Should Choose Your Childcare CRM Platform...

Choosing a CRM platform is an important decision. It takes careful consideration to find the right solution for your childcare organization's size and goals. To implement new technology, **the right people on your team need to be involved**. At ChildcareCRM, we find that the following people are typically part of the evaluation process.



### Single Centres

The key decision maker should be the owner or director of the centre. The director will be using your CRM daily to manage sales and marketing tasks. The owner and director will also be interested in reports that help optimize marketing spend, manage performance, and estimate revenue.



### Multiple Centres

The key decision maker should be in marketing, enrolment, operations or communications. This team will be using your CRM every day to automate sales and marketing activities, streamline communications and get real-time reporting.

Make sure to involve the people that are marketing your centre and **overseeing the communication between your centre(s) and prospective families**. They should be included in the demonstration process of whichever CRM platforms you are evaluating. Remember to focus on how each CRM vendor helps you simplify sales and marketing, enquiry management, boost occupancy and save administration time.

# How to Evaluate Your CRM Options...

## Outline Your Growth and Marketing Goals

Determine your **current room availability and what capacity your centre(s) need** to reach in order to achieve sustainable profitability. Next, set measurable objectives for yourself and your team that can help you achieve your goals and grow your childcare business. Plan your goals ahead of time, to avoid any low occupancy periods that can interfere with your overall goal.

## Research CRM Options Based on Your Goals

Once you've outlined your metrics and understand approximately how many children you want to enrol or how many tours you need to give in order to see higher conversion rates, look at CRM options that have **proven track-records of helping organizations like yours** meet similar goals.

## Set a Go Live Date for Implementation

The implementation process is just that – a process. So, be mindful of how many staff members you need to train on this new platform and get an estimate from your CRM's implementation team as to how long it takes to learn the software. **Understanding the timeline for rolling out your new CRM will help you stay organized and focused** while also trying to accomplish your regular duties. Additionally, make sure to work with your implementation specialist on transferring over contacts and important family data so you have all the information you need when it's time to go live.

## Map Out Key Milestones Necessary to Start Proving Value

Some examples of key milestones when beginning your journey with a CRM are:

- **Send and receive your first emails and texts** – both individual and group communications. This is important for understanding how the system works and what it looks like when you get a new message so you can respond to it in a timely manner.
- **Track new leads and where they are coming from** so you can measure the return on investment of marketing and advertising campaigns. Knowing what's working and what's not will help you save money and spend your budget more efficiently.
- **Assign tasks and regularly monitor how quickly they are being completed** by your staff. Having this kind of information can be very beneficial for understanding how your team members spend their time and what job functions take up the most of their day.
- **Create Email Marketing Campaigns** to consistently engage with your prospective and enrolled families throughout the year.

# CRM Essential Features Roadmap

## Lead and Child Management

Look for a solution that helps you manage all incoming family leads. Make sure the solution is tailored to the childcare industry—tracking parents and their children. Beware of industry agnostic CRMs that don't track the children of new leads. With a solution built for the childcare industry, this kind of tracking is built-in with no customization required.

## Task Management

Choose a solution that makes it easy to manage and prioritize daily tasks. You'll want easy task sorting by today's tasks, past tasks, and future tasks. If you're managing a team, you'll also want the ability to create and assign tasks to team members along with the ability to see task statuses across your team.

## Automated Communications

The faster you respond to a new lead, the greater likelihood they'll become a customer. Save time and manual work by automating communications. Look for a solution that enables you to create, customize, and personalize email and text templates and then automate their delivery over time and tracks replies.

"ChildcareCRM is great for ensuring we are touching base with all families right from when they first enquire"

– The Brooks/The Pocket Early Learning Centre

## Text Communications

It's no secret that Millennials are quickly becoming the world's most numerous generation; and the number of Millennials who are becoming parents is growing. In fact, a recent study conducted by the Pew Research Center found that 80% of today's parents to children under the age of 12 are Millennials.

**63% of parents would switch childcare providers if they found a centre that offered improved parent communication than their current provider.**

*ChildcareCRM*

It's estimated that 60% of millennials like to communicate with businesses via text messaging. Millennials feel text messaging is less invasive than phone calls and provides a more personal touch than other forms of communication, such as email. Childcare centres that use text to communicate see higher and faster response rates. Compared to email, open rates for texts are as high as 98%, and on average it only takes 90 seconds for someone to respond to a text.



Another important part of text messaging's appeal to the Millennial audience is largely based on convenience, speed, and flexibility. Text messages such as tour scheduling reminders and payment reminders are a great example of this. Almost half of the millennials surveyed by Chief Marketer —48%—said they prefer to receive notices about payment information through text, while more than half preferred to receive appointment reminders through their mobile device.

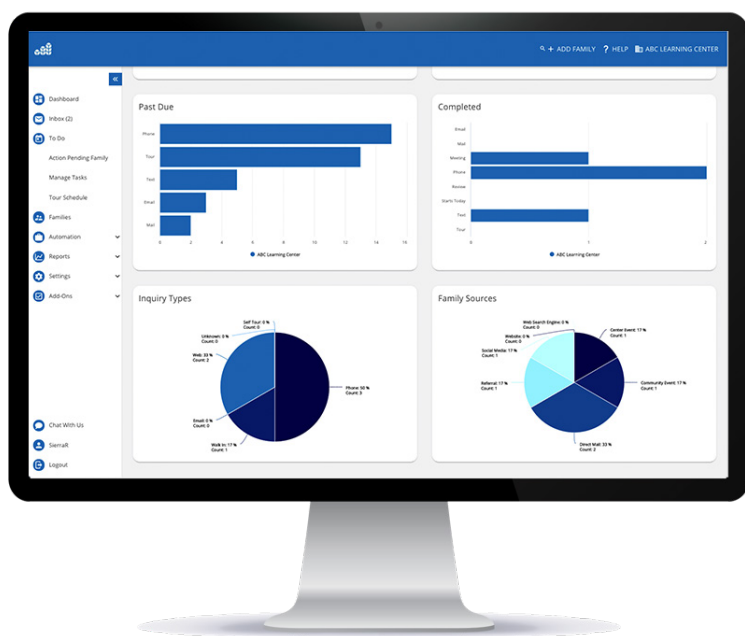
If your CRM does not provide a tool for sending and receiving text messages, you may find yourself missing out on prospective families and enrolments.

## Lead Capture

With families visiting your website to learn more about your childcare centre, you'll want to capture their interest with web forms. Make sure you choose a solution that gives parents the ability to schedule tours right from your website. Millennial parents especially like the convenience of self-scheduled tours. And you'll want the ability to create unlimited landing pages with web forms that flow directly into your CRM solution.

## Dashboard Reporting

Dashboard reporting allows childcare organizations to focus on lead behavior, improve the enrolment experience, and increase family retention. CRM reports help organizations identify and enrol families with precision, according to their needs and concerns regarding their child(ren)'s care. Because of the importance of reporting for measuring business performance and lead progression, look for a CRM that has easily accessible and digestible reports.



Some of the most important reports your childcare centre needs are:

- **Lead Sources:** Where your leads are coming from
- **Task Completion:** How many tasks are completed on time versus those that are overdue
- **Response Rate:** How quickly you and your centre's staff are following up with families
- **Enrolment Rate:** How many leads enter your system and move onto a registered or waitlisted status

## Online Parent Profile

Some families may not be quite ready to place their child into care straight away. When they first enquire, ChildcareCRM has the ability for the families to stay in the system and create a profile detailing all of the needs in a childcare centre. You will be able to stay in touch with the family and update them on your centre for news, communications and future vacancies until they are ready for their child to start.

**62% of incorrect contact information in information management systems is caused by manual data entry errors.**

*www.researchgate.net*

## Integration with Childcare Listing Directories

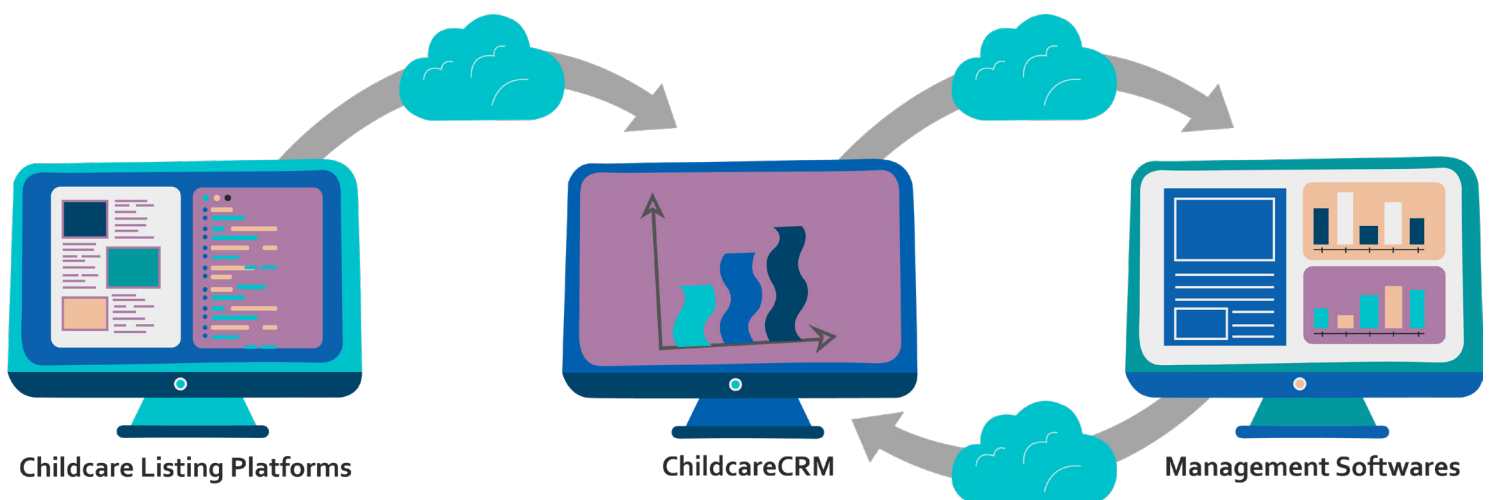
Generating leads is critical as you look to fill seats at your childcare centre(s). Childcare listing directories like Toddler and Care for Kids help you generate leads with free and paid listing services. Choose a CRM that integrates seamlessly with these websites so you can increase your incoming leads and have them flow directly into your CRM for follow up and marketing automation.

## Integration with Childcare Management Systems

Software integrations save time and improve data quality, so you don't have to input the same data into both your CRM and management system. Businesses that utilize software integrations primarily for data entry processes save an average of 3.8 hours per day. Additionally, those businesses with information management systems that don't offer integrations, regularly experience manual data entry errors which can cause up to 62% of the contact information in your CRM or management system to be incorrect or outdated.

**Businesses that utilize software integrations primarily for data entry processes save an average of 3.8 hours per day.**

*www.researchgate.net*



Look for a CRM solution that has proven integrations with key childcare management systems like Kidsoft and Quikkids. Integrating your technology stack will increase productivity within your organization and save staff time.

**Over 40% of workers surveyed spend at least a quarter of their work week on manual, repetitive tasks with data collection and data entry occupying the most time.**

*[www.smartsheet.com](http://www.smartsheet.com)*

## **Document Attachments**

During the enrolment and registration processes, there will be times you need to share additional assets related to the family you are interacting with. Perhaps there is a contract or a marketing newsletter that you want to share in an email to a parent. Having a CRM with the ability to attach documents is essential for your childcare business.

## **Mobile App**

Make sure the CRM provider you choose also has a mobile application. This comes in handy when you're on the go and want to access your CRM from your phone. View and manage new leads, your enrolment pipeline, scheduled tours, and more directly from your phone.

## **Simple, Easy to Use Interface**

Choose a CRM that's easy to use for you and your staff. The more intuitive the interface, the less training and onboarding you'll need. Look for a solution that cuts down the learning curve and maximizes ease-of-use by hiding fields and features you don't use.

## **Cloud-Based Software**

Skip installation hassles by choosing cloud-based CRM software that you can access anywhere, anytime on the web. With cloud-based software you can log in anywhere from any device with an internet connection. It's so much easier and more convenient.

## **Security**

As a childcare provider, you've got a laundry list of concerns every day. Security shouldn't be one of them. That's why your CRM should be securely encrypted and managed by a team with experience protecting their platform against hackers and other system violations. Each CRM provider should have documentation about their security measures and the best practices they follow to protect customer data. If you can't find it on their website, request more information during your demo.

# CRM Essential Services and Support

Make sure you look for these essential service and support options from the software providers you evaluate.

## Implementation and Training

Choose an experienced provider that has proven implementations at thousands of childcare centres. Look for a CRM provider that can guide you through implementation, providing best practices and recommendations to maximize your business along the way.

## Free, Live Customer Support

Never trust a software company that makes more money when their customers have more problems. Look for a CRM company that gives you free support any way you want it—chat, phone, or email. Also look for self-service support where you can search their website knowledge base for answers to your questions.





# Expanded Features for Enterprise Organizations

## Customizable Workflow Automation

Choose an experienced provider that has proven implementations at thousands of childcare centres. Look for a CRM provider that can guide you through implementation, providing best practices and recommendations to maximize your business along the way.

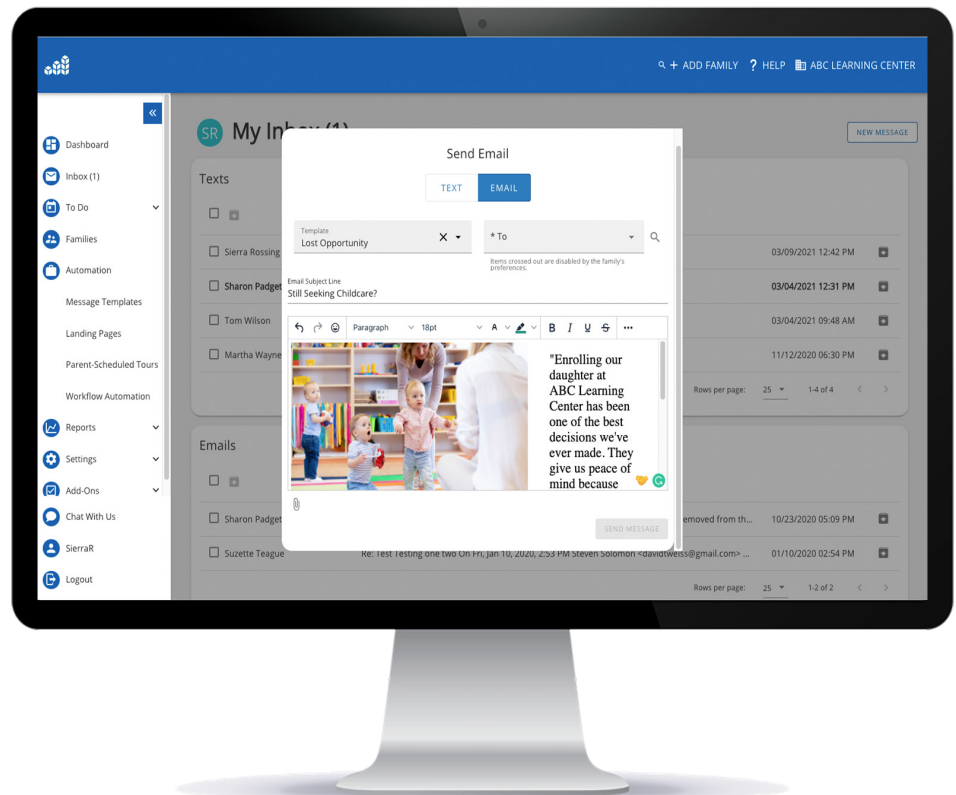
## Drip Campaigns

Take advantage of behavior-based visual workflows to easily build email campaigns. Drip campaigns can be used throughout the entire prospective parent's journey to enrolment. However, drip campaigns are also powerful tools for re-engaging families who have become disengaged and may be considered a 'lost opportunity'.

Drip campaigns allow you to communicate with prospective families based on how they interact with the content you share. Because these messages are all part of a single campaign, you can better monitor their effectiveness, your return on investment, and how the recipients are responding. For example, in a typical drip campaign, you would send out an email to all prospective parents. Those who opened and clicked through could then be given a task in your CRM to follow-up with them by phone. Those who did not open the email could automatically be sent a text at a designated time and date of your choosing.

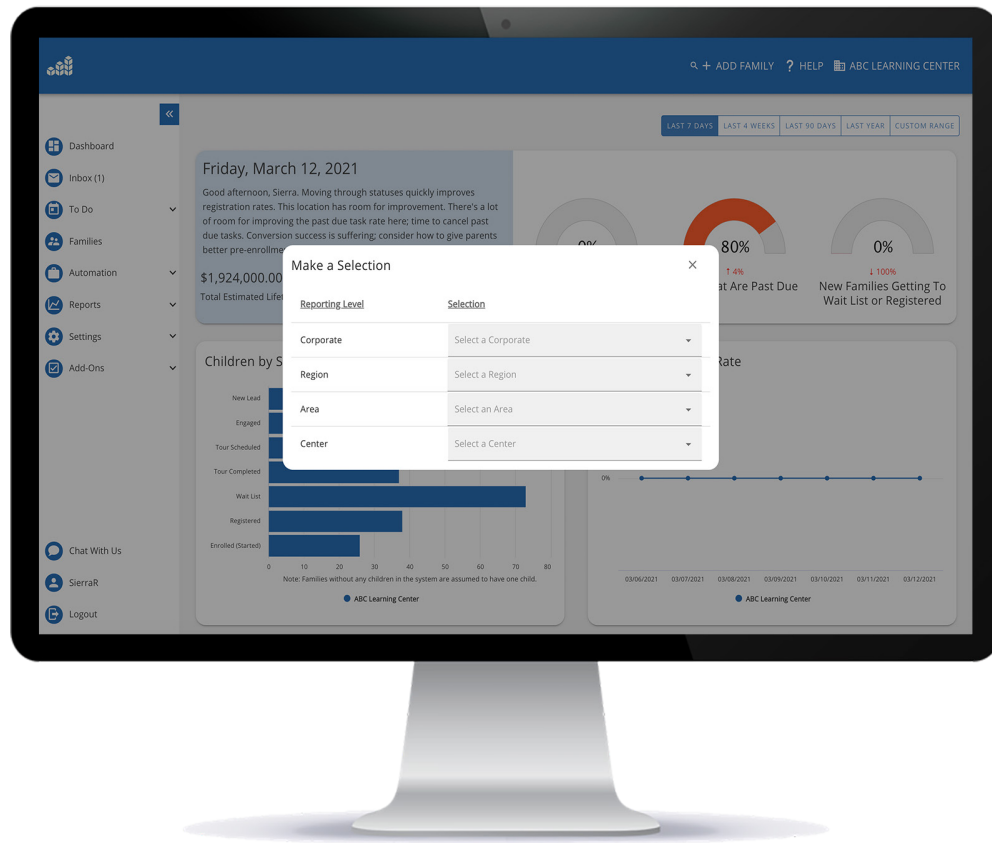
## Document Storage

Build on the advantages of using a cloud-based CRM by making sure your solution also stores commonly used attachments. If it also has the ability to store files that your new leads send you, that's even better.



## Custom Reporting and Analytics

For larger organizations who need access to additional data and analytics referencing staff productivity, parent engagement, and more – look for CRM software that has customizable reports with extensive filtering, selection and exporting options. These features within a user-friendly format give you the flexibility you need to quickly and thoroughly analyze family information, data trends, staff usage, and revenue potential.



## Multicentre Views

Look for a CRM provider that gives you multicentre views so you can manage your enrolment pipeline in real-time across centers. You'll also want pre-built and customizable inquiry statuses based on your enrolment process and the ability to see opportunity progression by center.

## Multicentre Branding

Choose a CRM solution that gives you branding flexibility so you can easily and effectively handle multiple brands within your organization. Make sure that:

- Locations can be tagged by brand
- Email and text templates can be created and set up by brand
- Group communication can be sent by brand
- Reports can be run by brand or any other defined location group



# Your Childcare CRM Checklist

## Enterprise | Single and Multicenter

- ☐ Manage both leads and their children
- ☐ View staff tasks and their progress
- ☐ Send and receive both emails and texts
- ☐ Email and text communication templates
- ☐ Capture leads from multiple sources
- ☐ At-a-glance, easy to read reports
- ☐ Create customized marketing campaigns
- ☐ Integrate with childcare listings/directories
- ☐ Integrate with my management system
- ☐ The software is cloud-based
- ☐ I can attach documents in messages
- ☐ Available on desktop or via mobile app
- ☐ It is user-friendly for my staff
- ☐ The system is securely protected
- ☐ Free live customer support
- ☐ Easy implementation and training
- ☐ **ALL THAT PLUS...**
- ☐ Customize workflow automations
- ☐ Create custom drip campaigns
- ☐ In-depth, customizable reports
- ☐ I can store documents in the system
- ☐ Multicenter views and branding

# About ChildcareCRM

ChildcareCRM is the leading provider of cloud-based CRM software that helps childcare organizations grow their business by boosting enrollment and saving time. **More than 4,000 childcare centres across the world rely on ChildcareCRM to automate sales and marketing** so their staff can focus on what matters most—caring for their enrolled families.

ChildcareCRM supports customers of all sizes from single centres to multinational enterprises with two editions of our CRM platform.

Features	CRM	CRM+
	(1-2 centres)	(Multiple Centres & Enterprises)
Lead/Child Management	✓	✓
Task Management	✓	✓
Two-Way Communication	✓	✓
Email/Text Templates	✓	✓
Mobile App	✓	✓
Unlimited Landing Pages	✓	✓
Parent-Scheduled Tours	✓	✓
Dashboard Reporting	✓	✓
Document Attachments	✓	✓
Document Storage	✗	✓
Drip Campaigns	✗	✓
Customizable Workflow Automations	✗	✓
Custom Reporting	✗	✓
Audit Trails	✗	✓
Multicentre Views	✗	✓
Multicentre Branding	✗	✓
INTEGRATIONS		
Childcare Listing Directories	✓	✓
Management Systems	Additional Cost	✓

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