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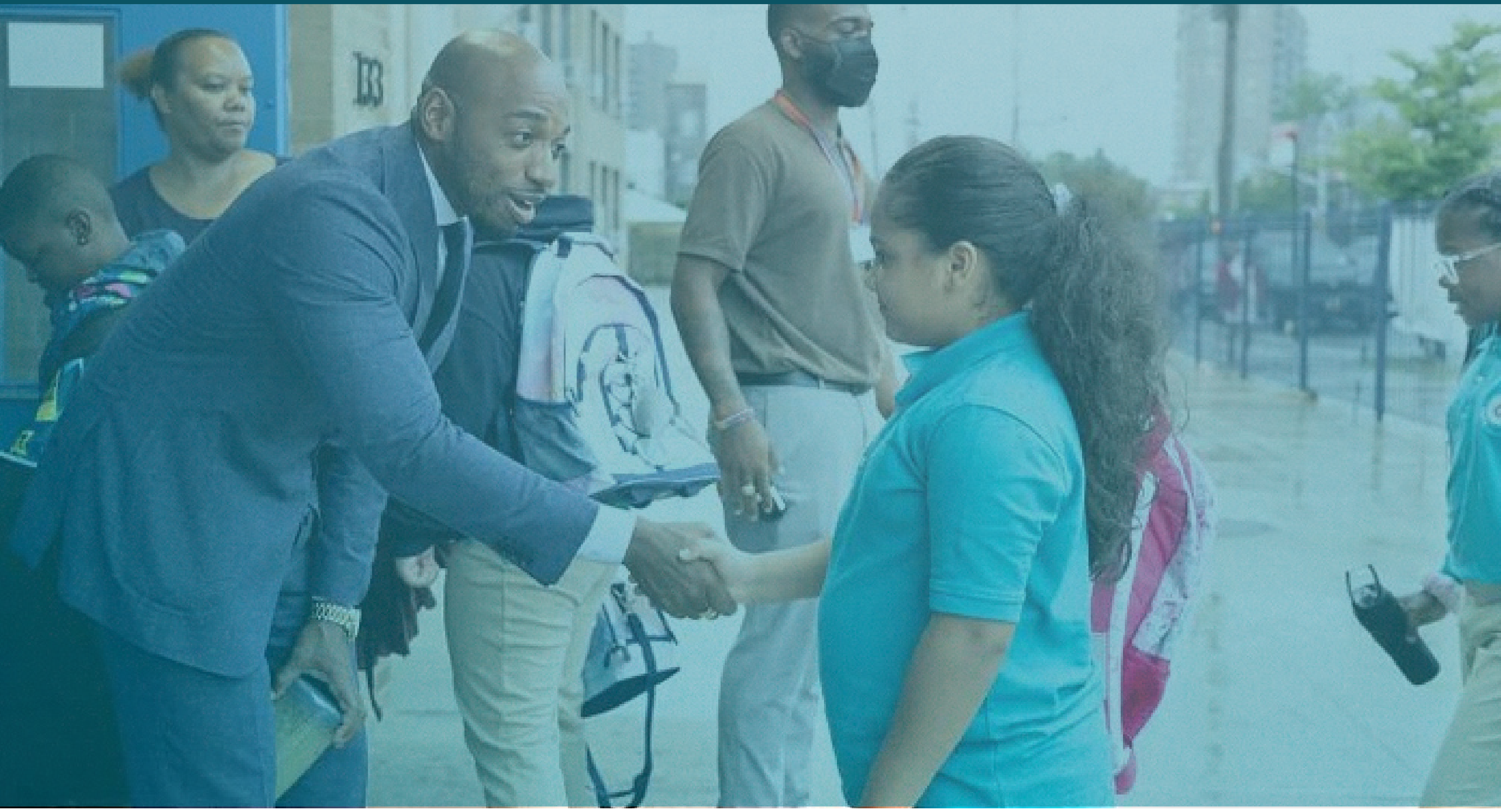

HubSpot + Student Recruitment Marketing Playbook

Updated on 9/22/2023

www.chartergrowthfund.org

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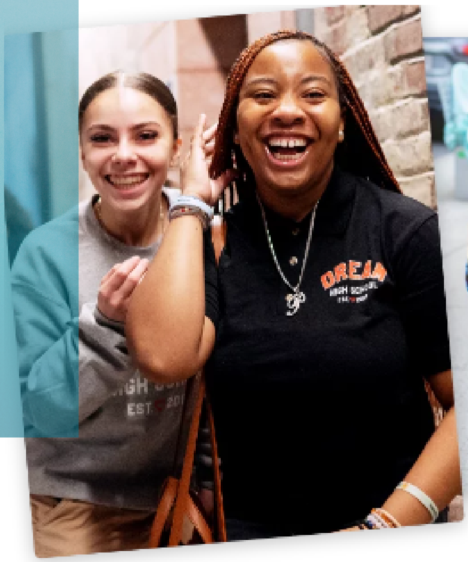
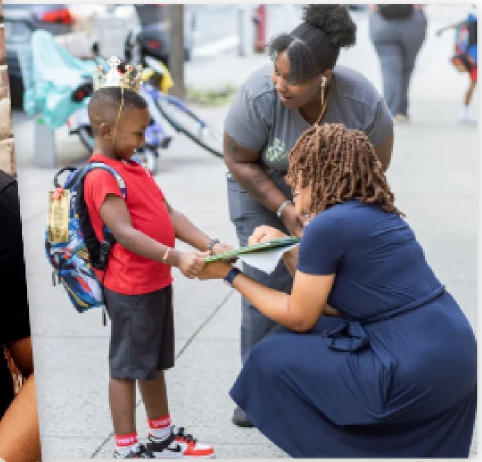




What is this playbook?

This playbook is a collection of guides for implementing HubSpot tools in four student recruitment marketing scenarios.

Who is this playbook for?

This playbook is for student recruitment marketers and recruiters responsible for recruiting new families.

How should I use this playbook?

Decide which scenario best applies to your student recruitment marketing and then follow the instructions in the guide for that scenario.

START HERE IF YOU ARE
NEW TO HUBSPOT

Find Your Scenario

Learn More

You are launching a lead generation campaign and you want to use HubSpot tools to run your ads, create a learn-more form, and set up automated nurture emails.

Use this guide if this scenario applies.

Quick Apply

Instead of the learn-more form, you want to use HubSpot's forms tool to replicate a school application, potentially lowering the barrier to entry for new families.

Use this guide if this scenario is appealing.

Summer Melt

You want to keep enrolled families engaged in the months between enrolling and the FDOS so decide to create an automated email nurture campaign using HubSpot.

Use this guide if you want to keep families warm.

School Tours

School tours have a high-conversion rate at your schools so you decide to repurpose HubSpot's Meeting tool as a school tours scheduler.

Use this step-by-step guide you want to schedule tours.

Quick Links

- Student Enrollment + HubSpot Strategy
- A HubSpot Powered Family Journey
- Step-by-Step Scenario Guides
- Responsibilities + Training Matrix by Role

HubSpot + Student Recruitment Marketing Playbook

Table of Contents

Quick Tip:

This playbook was designed for quick navigation. All underlined text (and the Table of Contents) is a link to another section in this playbook or an external resource.

Introduction

Section aim: This section provides readers with a high-level overview of this playbook. It covers what this playbook is, why it was created, and who it is for.

Key points and/or takeaways:

- This playbook was created for enrollment leaders looking to incorporate HubSpot's tools as part of their student application and enrollment family journey (marketing funnel).
- This playbook was designed with HubSpot in mind but what's covered could be replicated with other systems.
- This playbook is not a HubSpot implementation plan or an introduction to HubSpot.

Welcome to the HubSpot + Student Application and Enrollment Streamlined Playbook!

This playbook was developed by the Charter School Growth Fund (CSGF) and designed for anyone looking for a straight-forward approach to using HubSpot's many tools to attract, engage, and nurture new families.

In this playbook you will be introduced to a new enrollment marketing funnel framework called the Family Journey, learn where and how to incorporate HubSpot tools in your own family journey, and walk step-by-step through the process of setting up the tools needed to create your own family journey using HubSpot.

Our approach with this playbook is to first stamp core concepts and strategies then follow up with the "how-to" of using HubSpot's tools to approach four real-world student application and enrollment scenarios. After reading this playbook you will have the knowledge and skills to:

- Set up a learn-more lead generation funnel and lead nurture campaign
- Set up a quick-apply form and assign new applicants to recruiters
- Set up a summer-melt email nurture campaign
- Set up a school tours scheduling page connected to a recruiters calendar

There is a lot that is covered in this playbook, but we're just scratching the surface of what's possible with HubSpot. This is not a substitute for a HubSpot implementation plan. If this is your first time using HubSpot, we recommend jumping to the Responsibilities + Training Matrix section of this playbook and completing the recommended training based on your role.

It is worth noting that while this playbook leans into HubSpot, most, if not all of what is covered can be replicated using other marketing technology tools. We recommend starting with the tools you have and making the case for a bigger investment down the road.

The scenarios and recommendations covered in this playbook come from real-world scenarios and experiences of charters like KIPP St. Louis, KIPP NorCal, KIPP New Jersey, and many more. They deserve a huge thanks for their contributions to this playbook.

As always, CSGF is open to feedback. If you have any suggestions around how we can improve this playbook, please email us at jshaad@chartergrowthfund.org

Navigating This Playbook

The best way to use this playbook is to first review the four family journey scenarios in the Step-by-Step Scenario Guides section. Once you have identified the scenario that best applies to you, you can navigate to the corresponding guidance for that scenario.

If you are new to HubSpot, we recommend starting with the Student Enrollment + HubSpot Strategy section. This section provides an overview of the key strategies for using HubSpot to support student enrollment.

Once you have a good understanding of the family journey and HubSpot's tools, you can then move on to the Responsibilities + Training Matrix section. This section provides an overview of the roles and responsibilities involved in setting up and managing a HubSpot-powered family journey, as well as links to recommended training.

Lastly, if you need a primer on any of the terms used in this playbook, there is a glossary of terms you can reference.

Student Enrollment + HubSpot Strategy

Section aim: This section introduces readers to core concepts around the family journey (i.e., enrollment strategy) and highlights how tools in HubSpot can support touchpoints at almost every stage of a family's journey.

Key points and/or takeaways:

- The family journey is a way of organizing student recruitment strategy by the stages and touchpoints a family experiences with our school.
- The tools available in HubSpot are perfectly suited to create and manage many of the touchpoints along an ideal family journey.
- This section is not an introduction or overview of HubSpot. Some previous experience with HubSpot is assumed.

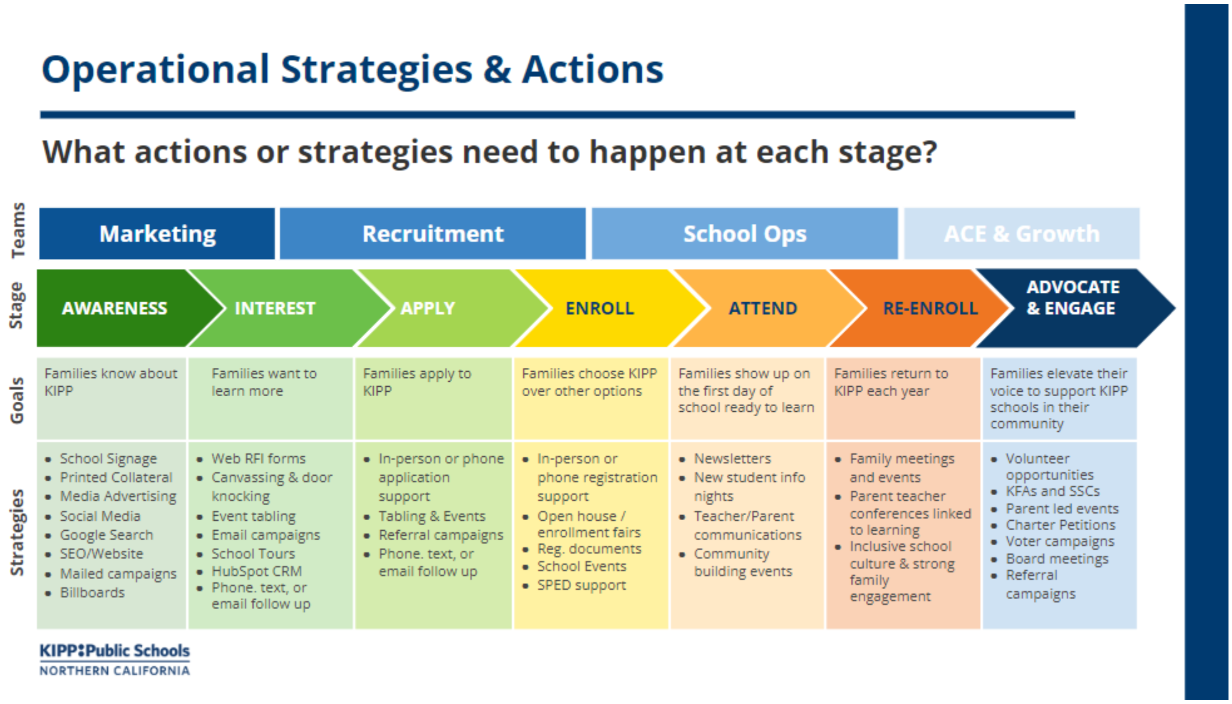
Family Journey Introduction

The Family Journey is a way of reimagining the traditional marketing funnel. Similar to a marketing funnel, a family journey details the stages and touchpoints a family experiences with your school from the moment they discover you to and through enrollment.

The journey is broken up into distinct stages based on where a family might be in their journey or decision making. Each of those stages are the many touchpoints a family might experience with your school along the journey.

It's worth noting that the returning Family Journey looks different, but the same concepts apply: regular touchpoints and a clear call to action will yield the best results when it comes to intent to return.

To illustrate this concept, below is a sample Family Journey from KIPP Northern California. In their journey, they highlight the teams, goals, strategies, and teams responsible for ensuring a great family experience.



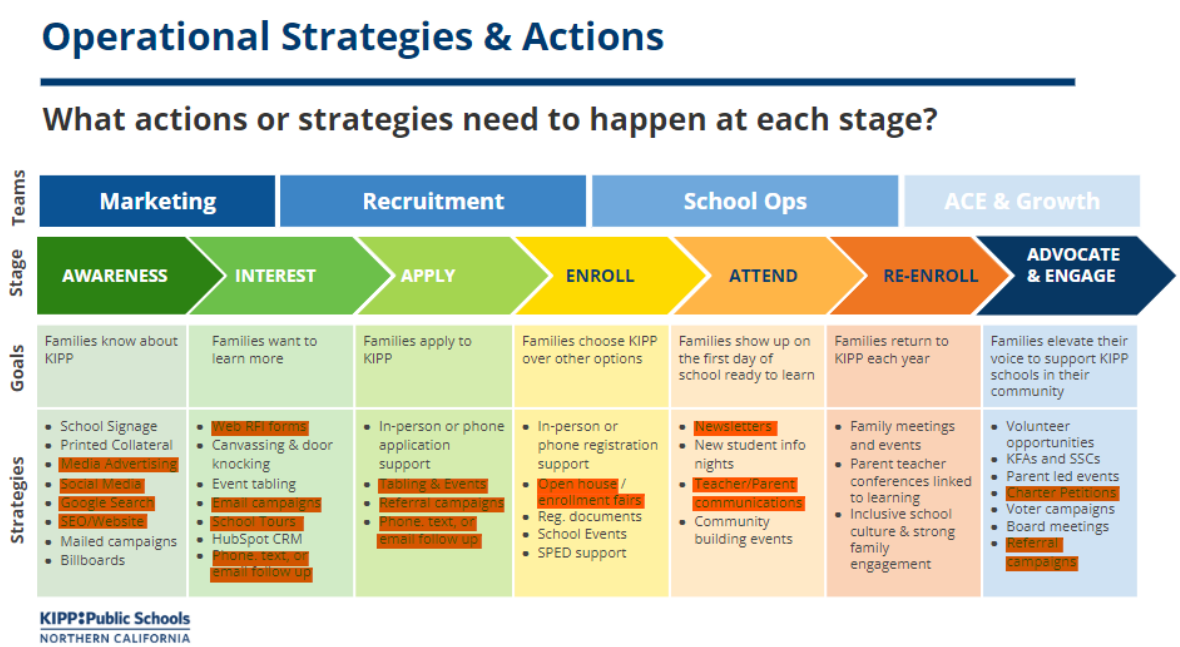
KIPP Northern California Family Journey Example[1]

What is HubSpot?

HubSpot is one of many customer relationship management systems (CRM) available and well suited to support the Family Journey. Using HubSpot's features and tools, we can create, automate, and measure touchpoints along a family's journey from interest to application to enrollment.

To illustrate how well suited HubSpot is to support the Family Journey, let's go back to the KIPP Northern California example but this time highlighting the touchpoints that HubSpot is designed to support. It's easy to see how powerful of a journey we can create when we combine the Family Journey framework with HubSpot's tools.

[1] Read the full presentation here: Family Journey Operationalizing from Interest to Matriculation, CSGF Enrollment & Marketing Leader Convenging, Sept 20, 2022



Keep in mind when working with HubSpot:

- HubSpot is not a Student Enrollment System. It will not replace Schoolmint, PowerSchool, or any other enrollment system you are currently using.
- HubSpot can integrate with many platforms, but not all of them. You can expect to integrate HubSpot with your existing email platform, Google Analytics, social media channels, etc. However, HubSpot does not currently integrate with SchoolMint or Powerschool.
- To that end, a data strategy is needed to ensure data integrity across systems like HubSpot and SchoolMint. Work with your IT team to come up with a process for managing data across platforms.

Here's an example of how a school may approach data management in a scenario where they're collecting applications on their website via a HubSpot quick-apply form.

- Applications are received through a HubSpot-form embedded onto an enrollment landing page
- That application (and all their data) is assigned to a recruiter automatically via a workflow
- The recruiter connects 1:1 with the application to review and confirm their information
- The recruiter (or designated data entry person) enters the application information manually into SchoolMint or Powerschool

This approach is labor intensive. But with proper planning and resourcing, this tactic will yield results. It is also important to remember that HubSpot is not a SchoolMint replacement. For example, HubSpot cannot run a lottery. HubSpot excels at creating an easy user experience while bringing automation and visibility to your student recruitment marketing. There is big upside despite the effort needed to manually transfer data from one platform to another.

A HubSpot-Powered Family Journey

Section aim: This section bridges the concept of the family journey and the tools in HubSpot by illustrating how someone would design HubSpot-powered touchpoints for four student enrollment scenarios.

Key points and/or takeaways:

- Using the tools in HubSpot to support your enrollment efforts takes planning and a good understanding of how they work.
- HubSpot's tools can be used and configured in different ways depending on the aim of your effort.
- Executing an effective family journey takes coordination across roles. The use of HubSpot is no different.
- There are alternatives to HubSpot. Use the tools available to you.

Building a HubSpot-Powered Family Journey

In this section, we provide a high-level overview of the steps involved with using HubSpot to build family journeys for the four scenarios we previously covered. If you are new to launching student application and enrollment campaigns, whether with or without HubSpot, this is a good place to start.

To begin building our journey with HubSpot's tools, we first need to select a scenario and map out the touchpoints a family will experience in that specific journey. For example, the first touchpoint for many families in the discovery stage of their journey will be an ad on Facebook. In our scenario, that ad could be part of an ad campaign that is set up through HubSpot (i.e., a HubSpot-powered touchpoint).

Below are tables that provide a high-level overview of the journeys covered in each scenario in this playbook. Each table highlights the HubSpot tools that will be used to create the touchpoints at each stage of the journey and which team is typically responsible for that touchpoint. The links in the tables go to training information on each of the tools. The links to the scenarios are linked to later in this section.

Journey flow, touchpoints, ownership, and HubSpot tools for a new family **Ready to Learn More** or **Ready to Apply**:

Journey Flow	Social Content | Ad > Landing Page > Form > Recruiter Outreach > Lead Nurture Emails				
Journey Touchpoint	Social Content | Ad	Landing Page	Lead Form	Recruiter Outreach	Lead Nurture Emails

HubSpot Tool	Social Media Management	Landing Pages	Forms Lists Workflows	Phone Call Text Message 1:1 Email	Email Workflows
Responsibility	**Marketing**	**Marketing**	**Marketing + Operations**	**Operations**	**Marketing**

Journey flow, touchpoints, ownership, and HubSpot tools for a new family **Ready to Tour a School**:

Journey Flow	Social Content | Ad > Landing Page > **School Tour Scheduler** > Recruiter Outreach > Lead Nurture Emails				
Journey Touchpoint	Social Content | Ad	Landing Page	Lead Form	Recruiter Outreach	Lead Nurture Emails
HubSpot Tool	Social Media Management	Landing Pages	Meetings Tool Lists Workflows	Phone Call Text Message 1:1 Email	Email Workflows
Responsibility	**Marketing**	**Marketing**	**Marketing + Operations**	**Operations**	**Marketing**

Journey flow, touchpoints, ownership, and HubSpot tools for an **Email Nurture Campaign**:

Journey Flow	Form > **Lead Nurture Emails**
Journey Touchpoint	Lead Nurture Emails
HubSpot Tool	Email Workflows
Responsibility	**Marketing**

HobSpot-Alternative-Powered Family Journey

While this playbook was designed with HubSpot in mind, we recognize the tools you have available may be different from what is covered in this book. The good news is there are many great alternatives for many of the tools available in HubSpot. For example, you should feel free to substitute in Emma or MailChimp for all of the email touchpoints if that's the service available to you. Or, HootSuite is a great alternative for planning and tracking your enrollment social media posts.

Get creative and use what you have then make the case for future investment.

Touchpoint	**HubSpot Alternative**
Email	Mailchimp Emma
Social Media Management	HootSuite
School Tour Scheduler	Calendly
Workflows (Marketing Automation)	Zapier
Landing Pages	Leadpages

Step-by-Step Scenario Guides

Section aim: This section provides readers with step-by-step instructions on how to use HubSpot's tools to create a family journey for the four scenarios covered in an earlier section.

Key points and/or takeaways:

- Make sure to prepare all of your content and materials before starting. This includes ensuring all of your content is prepared and you have the appropriate HubSpot access.

This section of the playbook provides a collection of step-by-step guides that walk you through the steps involved in setting up HubSpot's tools to support your chosen journey. Use the Quick Links below to quickly navigate to the step-by-step guide you need.

Before you begin a step-by-step guide, please carefully review the prerequisites and requirements. This will help ensure a smooth setup process. We recommend starting a step-by-step guide only after you have met all of the prerequisites and have finalized your collateral materials (e.g., ads and emails).

We appreciate your feedback. Please let us know if you find any inaccuracies or have any suggestions for improving this guide. You can send your feedback to jshaad@chartergrowthfund.org.

Quick Links to Step-by-Step Guides

- Creating a Learn More Journey for New Families
- Creating a Quick-Apply Journey for New Families
- Creating a Summer Melt Email Nurture Campaign for New Families
- Creating a School Tours Journey for New Families

Family Journey Scenarios

Note: Within the context of this playbook, a family journey implies the stages and touchpoints a family experiences as they go from discovering your school to enrolling. We cover the Family Journey framework in greater detail later in this playbook.

There are many different scenarios we could boil down into a "family journey." For many of those scenarios, there are likely ways to leverage HubSpot's features and tools to build them. In this playbook, we will focus on four common scenarios that we will build a family journey from and use HubSpot's tools to create.

Let's jump into the scenarios!

Scenario 1: Learn More

Your school needs to grow its waitlist so you decide to launch a lead generation campaign with a “learn more” call to action. To do this, you use HubSpot’s Ads Software to launch an ad campaign geared toward driving traffic to a student enrollment landing page that hosts a HubSpot lead generation form that captures basic information from families.

If you find yourself in this scenario, use this step-by-step guide that outlines how to accomplish these steps:

1. Create a list in HubSpot where your leads will ‘live’
2. Create a HubSpot campaign and assign all assets to this campaign
3. Set up and run ads through HubSpot
4. Draft and set up 2-3 email nurture campaign series
5. Create a lead form and embed is onto your landing page
6. Set up workflow assigning lead to your list, enroll in lead nurture campaign, and assign to recruiter
7. Use HubSpot’s campaign reporting to track efforts

Scenario 2: Quick Apply

It is either a few months before the lottery or post lottery and you still need to increase your applications. You decide to run a paid media campaign that will drive visitors to an enrollment landing page that hosts a quick-apply form that is a mirror copy of the physical copy your families fill out.

You want to do it this way because you have heard from families that the existing online application is hard to access and use. You know recreating the application using HubSpot forms and embedding it onto your landing page will lower the barrier to entry for families and give you a way to track your paid media performance like you couldn’t before.

If you find yourself in this scenario, use this step-by-step guide that outlines how to accomplish these steps:

1. Create HubSpot properties for required application fields
2. Create a list in HubSpot where your leads will ‘live’
3. Create a HubSpot campaign and assign all assets to this campaign

4. Set up and run ads through HubSpot
5. Draft and set up 2-3 email nurture campaign series
6. Create a quick-apply form and embed is onto your landing page
7. Set up workflow assigning lead to your list, enroll in lead nurture campaign, and assign to recruiter
8. Use HubSpot's campaign reporting to track efforts

Scenario 3: Summer Melt Email Nurture Campaign

You have a growing list of enrolled families that you need to keep engaged in the months between enrolling and the first day of school. You know that regular touchpoints with families throughout this time is a great way to keep them engaged so you decide to launch a summer-melt email nurture campaign.

If you find yourself in this scenario, use this step-by-step guide that outlines how to accomplish these steps:

1. Create a list and upload contact information for your enrolled families
2. Create a HubSpot campaign and assign all assets to this campaign
3. Draft and set up 3-4 nurture emails that are pre-schedule throughout the summer
4. Use HubSpot's campaign reporting to track efforts

Scenario 4: School Tours Scheduler

You know that school tours have some of the highest conversion rates when it comes to converting interested families. You also know that a cumbersome school tour process can lead to dissatisfied families who ultimately look elsewhere. To make it easier for families to sign up for school tours, you decide to repurpose HubSpot's Meeting Scheduler Tool and make it a School Tour Scheduler that is connected to your recruiters calendar. .

If you find yourself in this scenario, use this step-by-step guide that outlines how to accomplish these steps:

1. Create a HubSpot account for the recruiter leading school tours
2. Set up and embed meeting scheduler widget

We have only covered four baseline scenarios in this section of the playbook. We recognize that there are many more scenarios that we encounter in student recruitment and enrollment, and we would like to get your input on what other common scenarios you would like to see covered in future iterations of this playbook. Email your suggestions to jshaad@chartergrowthfund.org.

Creating a 'Learn More' Journey for New Families

Last updated: 9/22/2023
Time investment: 5-8 hours
Objective: Our objective is to capture new leads with a call to action (CTA) focused on collecting the minimum information needed to follow up with leads through phone calls, text messages, and emails.
Prerequisites or requirements:

- Campaign key messages and CTAs along with a clearly defined audience
- Ads text and creative and an idea of targeting
- Familiarity with your website's content management system (CSM)
- Text for series of lead nurture emails

Required HubSpot tools:

- Forms
- Lists
- Workflows
- Social Media Management
- Email

CSGF Live Demo:

- [insert link to CSGF live demo]

Why is this important: After building this journey, you will have a way of proactively (ads) and passively (organic traffic) generating leads year-round. This will help fill seats and grow waitlists.
Where is this done: This setup is done on a computer and requires an internet connection. Access to your website's content management system (CMS) and a HubSpot account with a subscription to all of the required features and tools is also required.
When is this done: Plan to execute this set up in the early Fall, before you launch the following year's student enrollment marketing campaign.
Who does this: What's outlined in this process is typically the responsibility of the marketing team. That said, this step-by-step guide is designed for anyone to use so long as prerequisites and requirements are met.

Procedure

- [ ] **Create a HubSpot list where your lead information will 'live'**

1. Go to Contacts > Lists.
2. In the upper right corner, click Create list.
3. In the left panel, select Contact-based to create a list of contacts.
4. In the right panel, enter a name for the list and select if you want an Active list or a Static list.
   - 4.1. An active list is a dynamic list that automatically updates over time. It keeps adding contacts when the criteria are matched and removes them when they no longer meet the requirements.
   - 4.2. A static list does not update even if a new contact meets the criteria.

5. In the upper right corner, click Next.
6. In the left panel, set the criteria for the contacts you want to segment. You can select up to 250 filters per list.
    6.1. To learn more about the list criteria available to you and how they work, you can refer to this article: https://knowledge.hubspot.com/lists/create-active-or-static-lists.
7. In the upper right corner, click Save.

Your list will be created and you can start adding contacts to it.

Here are some additional tips for creating lists in HubSpot:

- Use descriptive names for your lists so that you can easily identify them later.
- Use a consistent naming convention for your lists so that they are easy to organize.
- Use clear and concise criteria for your lists so that you only add the contacts that you want to include.
- Review your lists regularly to make sure that they are still accurate and up-to-date.

Additional training resources:
- Create and use lists
- Export your lists
- Determine your list criteria

☐ **Create a HubSpot campaign and assign all assets to this campaign**

1. Go to Marketing > Campaigns.
2. In the upper right corner, click Create campaign > Start from scratch.
3. In the right panel, enter a name for the campaign.
4. In the right panel, select a campaign color.
5. In the right panel, select campaign owner.
6. In the right panel, set the start and end dates for the campaign.
7. In the right panel, enter a goal for the campaign.
8. In the right panel, enter an audience for the campaign.
9. (Optional) Select campaign currency.
10. Click Save.

A campaign asset is any piece of content that is associated with a campaign. This can include things like landing pages, email templates, social media posts, and even ads.

To assign assets to the campaign, follow these steps:

1. Click on the campaign that you want to assign assets to.
2. In the upper left corner, click Add assets.
3. In the left panel, select the assets that you want to associate with the campaign.
4. Click Save.

The assets that you assign to the campaign will be used to track the performance of the campaign. For example, if you assign a landing page to the campaign, HubSpot will track how many people visit the landing page and how many people convert into leads or applications.

Here are some additional tips for creating and assigning assets to HubSpot campaigns:

- Use descriptive names for your campaigns and assets so that you can easily identify them later.
- Use a consistent naming convention for your campaigns and assets so that they are easy to organize.
- Use clear and concise criteria for your campaigns and assets so that you only include the contacts or lists that you want to target.
- Review your campaigns and assets regularly to make sure that they are still accurate and up-to-date.

Additional training resources:
- Create campaigns
- Campaigns FAQ

☐ **Set up an ad campaign in HubSpot**
Note: This section requires you already have text and creative for your ads as well as a budget and audience targeting.

1. Go to Marketing > Ads.
2. In the upper right corner, click Create campaign.
3. In the left panel, select the type of ad campaign that you want to create.
   3.1. The type of ad campaign determines the platform where your ads will be displayed. For example, a Google Ads campaign will be displayed on Google Search and Display Network.
4. In the right panel, enter a name for the campaign and set the start and end dates.
5. In the right panel, enter a budget for the campaign.
6. In the right panel, select the targeting criteria for your ads.

6.1. The targeting criteria determines who will see your ads. For example, you can target your ads to people in a specific location, who have visited your website, or who have certain interests.

7. In the right panel, create your ad creative.
    7.1. The ad creative is the text and images that will be displayed in your ads.
8. Click Save.

Once you have created the ad campaign, you can assign it to a HubSpot campaign by following these steps:

1. Go to the HubSpot campaign that you want to assign the ad campaign to.
2. In the upper right corner, click Add assets.
3. In the left panel, select the ad campaign that you want to associate with the HubSpot campaign.
4. Click Save.

The ad campaign will now be assigned to the HubSpot campaign. You can track the performance of the ad campaign in the HubSpot Ads dashboard.

Here are some additional tips for setting up and assigning ad campaigns to HubSpot campaigns:

- Use clear and concise targeting criteria so that your ads are only seen by the people who are most likely to be interested in your products or services.
- Create ad creative that is relevant to your target audience and that will grab their attention.
- Monitor the performance of your ad campaigns regularly and make adjustments as needed.

Additional training resources:
- Getting started with HubSpot Ads
- Creating ads audiences in HubSpot
- HubSpot Ads FAQ

☐ **Set up a lead nurture campaign Draft and set up 2-3 email nurture campaign series**
Note: Need draft emails before starting. Here are samples for a 3 series drip.
KIPP Northern California Welcome Email Example
KIPP SoCal Welcome Email Example
Sample 3 [non-KIPP example needed]

1. Go to Marketing > Email.

2. In the upper right corner, click Create campaign.
3. In the right panel, select Nurture as the campaign type.
4. In the right panel, enter a name for the campaign and set the start and end dates.
5. In the right panel, select the contacts or lists that you want to include in the campaign.
6. In the right panel, create the emails that you want to send in the campaign.
   6.1. Each email should have a clear objective and should be relevant to the target audience.
   6.2. The emails should be well-written and should be free of errors.
7. In the right panel, set the frequency of the emails.
   7.1. You can choose to send the emails daily, weekly, or monthly.
8. Click Save.

Once you have created the email nurture campaign, you can assign it to a HubSpot campaign by following these steps:

1. Go to the email nurture campaign that you want to assign to a HubSpot campaign.
2. In the upper right corner, click Settings.
3. In the left panel, select Campaigns.
4. Select the HubSpot campaign that you want to associate with the email nurture campaign.
5. Click Save.

The email nurture campaign will now be assigned to the HubSpot campaign. You can track the performance of the email nurture campaign in the HubSpot Marketing Hub dashboard.

Here are some additional tips for setting up and assigning email nurture campaigns to HubSpot campaigns:

- Use a clear and concise objective for each email in the campaign.
- Make sure that the emails are relevant to the target audience.
- Use a variety of content formats, such as text, images, and videos.
- Personalize the emails as much as possible.
- Track the performance of the campaign and make adjustments as needed.

Additional training resources:
- Lead nurturing with HubSpot
- 7 best practices for lead nurturing emails

☐ **Create a lead form and embed is onto your landing page**
Note: This step requires access to your website CMS backend or access to whichever platform you are using to host your landing page.

1. Go to Marketing > Lead Capture > Forms.
2. In the upper right corner, click Create form.
3. In the left panel, select Blank template to start with a blank form or a pre-made template to start with a form with pre-selected fields for a specific use case. The form preview for a selected template will appear in the right panel.
4. In the right panel, enter a name for the form and add the fields that you want to include in the form.
    a. You can add a variety of fields, such as name, email address, phone number, zip code, and grade applying for.
5. In the right panel, customize the form by adding a header, footer, and branding.
6. In the right panel, select the campaign that you want to associate the form with.
7. In the upper right corner, click Save.

Once you have created the form, you can embed it onto your landing page by following these steps:

<u>HubSpot Landing Pages:</u>

1. Go to the HubSpot landing page where you want to embed the form.
2. In the editor, click on the Insert tab.
3. In the left panel, select Forms.
4. Select the form that you want to embed.
5. The form will be embedded onto your landing page.

<u>Non-HubSpot Landing Pages:</u>

1. Go to the HubSpot form that you just created.
2. Click on the Embed tab.
3. Copy the embed code.
4. Go to your landing page and open the HTML code.
5. Paste the embed code into the HTML code.
6. Save the HTML code and publish your landing page.

Here are some additional tips for creating and embedding lead generation forms in HubSpot:

- Use clear and concise field labels so that users know what information you are asking for.
- Make sure that the form is easy to use and that the fields are not too long or too complicated.
- Test the form on different devices and browsers to make sure that it works properly.
- Track the performance of the form to see how many leads it is generating.

Additional training resources:
- Create forms
- Customize form field options
- Set up form submission notifications

☐ **Create a workflow that will assign new leads to a recruiter**

1. Go to Automation > Workflows.
2. In the upper right corner, click Create workflow.
3. In the left panel, select From scratch.
4. In the right panel, enter a name for the workflow and select the list that you want to use as the trigger.
   4.1. The trigger is the event that will start the workflow. In this case, the trigger will be a new lead being added to the list.
5. In the right panel, select the action that you want to take. In this case, the action will be to assign the lead to a recruiter.
   5.1. You can select a specific recruiter or you can select a group of recruiters.
6. In the right panel, set the conditions for the workflow. In this case, you can set the condition to only assign leads that meet certain criteria, such as leads for a certain grade or leads for a specific school.
7. In the upper right corner, click Save.

Your workflow will now be created and will automatically assign new leads in the list to the recruiter that you specified.

Here are some additional tips for setting up workflows in HubSpot:

- Use clear and concise names for your workflows so that you can easily identify them later.
- Use a consistent naming convention for your workflows so that they are easy to organize.
- Use clear and concise conditions for your workflows so that they only trigger when you want them to.

- Test your workflows regularly to make sure that they are working properly.

Additional training resources:
- Create workflows
- Troubleshoot workflow enrollment issues

☐ **Use HubSpot's campaign reporting to track efforts**

1. Go to Reports > Reports.
2. In the upper right corner, click Create report.
3. In the Create reports from scratch section, select Campaign Reports.
4. In the left panel, select the campaign that you want to create a report for.
5. In the right panel, select the metrics and dimensions that you want to include in the report.
    5.1. Metrics are the data points that you want to measure, such as leads generated or website traffic.
    5.2. Dimensions are the categories that you want to group your data by, such as campaign type, source, or medium.
6. In the right panel, select the date range for the report.
7. In the right panel, select the format for the report.
    7.1. You can choose to export the report as a PDF, CSV, or Excel file.
    7.2. You can also choose to embed the report in a web page.
8. Click Create report.

Your report will now be created and you can view it in the Reports dashboard.

Here are some additional tips for creating campaign reports in HubSpot:
- Use clear and concise names for your reports so that you can easily identify them later.
- Filter your reports to focus on the data that is most important to you.
- Export your reports to share with others or to keep a historical record of your campaign performance.

Additional training resources:
- Analyze campaigns
- Analyze individual campaign performance

Thank you for reviewing our step-by-step guide. We appreciate your feedback. Please let us know if you find any inaccuracies or have any suggestions for improving this guide. You can send your feedback to jshaad@chartergrowthfund.org.

Creating a 'Quick-Apply' Journey for New Families

Last updated: 9/22/2023
Time investment: 5-8 hours
Objective: Our objective is to generate new applications with a CTA and form focused on collecting the same information collected on a physical copy of your schools application/enrollment form.
Prerequisites or requirements:

- Campaign key messages and CTAs along with a clearly defined audience
- List of required fields from school enrollment application
- Ads text and creative and an idea of targeting
- Familiarity with your website's content management system (CSM)
- Text for series of lead nurture emails

Required HubSpot tools:

- Forms
- Lists
- Workflows
- Social Media Management
- Email

CSGF Live Demo:

- [insert link to CSGF live demo]

Why is this important: After building this journey, families will have a way of applying for a seat in your school directly on your website vs. creating an account and filling out the application on an enrollment platform. This lowers the barrier to entry for families and creates a more enjoyable experience for them all around.
Where is this done: This setup is done on a computer and requires an internet connection. Access to your website's content management system (CMS) and a HubSpot account with a subscription to all of the required features and tools is also required.
When is this done: Plan to execute this set up in the early Fall, before you launch the following year's student enrollment marketing campaign.
Who does this: What's outlined in this process is typically the responsibility of the marketing team. That said, this step-by-step guide is designed for anyone to use so long as prerequisites and requirements are met.

Procedure

- [ ] **Create HubSpot properties for required application fields**

1. Go to Settings > Properties.
2. Click the Create property button.
3. Select the object type for the property.
4. Enter a name for the property.
5. Select the field type for the property.

6. (Optional) Enter a description for the property.
7. Click the Create button.

Here are some additional things to keep in mind when creating a new property:

- The field type determines the type of data that can be stored in the property. For example, you can create a text property, a number property, or a date property.
- The description is optional, but it can be helpful to provide a brief explanation of what the property is used for.
- You can create custom properties for any object type, including contacts, companies, deals, tickets, and feedback submissions.

Additional training resources:

- [Creating and editing HubSpot properties]

☐ **Create a HubSpot list where your lead information will 'live'**

1. Go to Contacts > Lists.
2. In the upper right corner, click Create list.
3. In the left panel, select Contact-based to create a list of contacts.
4. In the right panel, enter a name for the list and select if you want an Active list or a Static list.
   4.1. An active list is a dynamic list that automatically updates over time. It keeps adding contacts when the criteria are matched and removes them when they no longer meet the requirements.
   4.2. A static list does not update even if a new contact meets the criteria.
5. In the upper right corner, click Next.
6. In the left panel, set the criteria for the contacts you want to segment. You can select up to 250 filters per list.
   6.1. To learn more about the list criteria available to you and how they work, you can refer to this article: https://knowledge.hubspot.com/lists/create-active-or-static-lists.
7. In the upper right corner, click Save.

   Your list will be created and you can start adding contacts to it.

   Here are some additional tips for creating lists in HubSpot:

   - Use descriptive names for your lists so that you can easily identify them later.

- Use a consistent naming convention for your lists so that they are easy to organize.
- Use clear and concise criteria for your lists so that you only add the contacts that you want to include.
- Review your lists regularly to make sure that they are still accurate and up-to-date.

Additional training resources:

- Create and use lists
- Export your lists
- Determine your list criteria

☐ **Create a HubSpot campaign and assign all assets to this campaign**

1. Go to Marketing > Campaigns.
2. In the upper right corner, click Create campaign > Start from scratch.
3. In the right panel, enter a name for the campaign.
4. In the right panel, select a campaign color.
5. In the right panel, select campaign owner.
6. In the right panel, set the start and end dates for the campaign.
7. In the right panel, enter a goal for the campaign.
8. In the right panel, enter an audience for the campaign.
9. (Optional) Select campaign currency.
10. Click Save.

A campaign asset is any piece of content that is associated with a campaign. This can include things like landing pages, email templates, social media posts, and even ads.

To assign assets to the campaign, follow these steps:

1. Click on the campaign that you want to assign assets to.
2. In the upper left corner, click Add assets.
3. In the left panel, select the assets that you want to associate with the campaign.
4. Click Save.

The assets that you assign to the campaign will be used to track the performance of the campaign. For example, if you assign a landing page to the campaign, HubSpot will track how many people visit the landing page and how many people convert into leads or applications.

Here are some additional tips for creating and assigning assets to HubSpot campaigns:

- Use descriptive names for your campaigns and assets so that you can easily identify them later.
- Use a consistent naming convention for your campaigns and assets so that they are easy to organize.
- Use clear and concise criteria for your campaigns and assets so that you only include the contacts or lists that you want to target.
- Review your campaigns and assets regularly to make sure that they are still accurate and up-to-date.

Additional training resources:

- [Create campaigns]
- [Campaigns FAQ]

☐ **Set up an ad campaign in HubSpot**

Note: This section requires you already have text and creative for your ads as well as a budget and audience targeting.

1. Go to Marketing > Ads.
2. In the upper right corner, click Create campaign.
3. In the right panel, select the type of ad campaign that you want to create.
   3.1. The type of ad campaign determines the platform where your ads will be displayed. For example, a Google Ads campaign will be displayed on Google Search and Display Network.
4. In the right panel, enter a name for the campaign and set the start and end dates.
5. In the right panel, enter a budget for the campaign.
6. In the right panel, select the targeting criteria for your ads.
   6.1. The targeting criteria determines who will see your ads. For example, you can target your ads to people in a specific location, who have visited your website, or who have certain interests.
7. In the right panel, create your ad creative.
   7.1. The ad creative is the text and images that will be displayed in your ads.
8. Click Save.

Once you have created the ad campaign, you can assign it to a HubSpot campaign by following these steps:

1. Go to the HubSpot campaign that you want to assign the ad campaign to.
2. In the upper right corner, click Add assets.

3. In the left panel, select the ad campaign that you want to associate with the HubSpot campaign.
4. Click Save.

The ad campaign will now be assigned to the HubSpot campaign. You can track the performance of the ad campaign in the HubSpot Ads dashboard.

Here are some additional tips for setting up and assigning ad campaigns to HubSpot campaigns:

- Use clear and concise targeting criteria so that your ads are only seen by the people who are most likely to be interested in your products or services.
- Create ad creative that is relevant to your target audience and that will grab their attention.
- Monitor the performance of your ad campaigns regularly and make adjustments as needed.

Additional training resources:

- Getting started with HubSpot Ads
- Creating ads audiences in HubSpot
- HubSpot Ads FAQ

☐ **Set up a lead nurture campaign Draft and set up 2-3 email nurture campaign series**
Note: Need draft emails before starting. Here are samples for a 3 series drip.
KIPP Northern California Welcome Email Example
KIPP SoCal Welcome Email Example
Sample 3 [non-KIPP example needed]

1. Go to Marketing > Email.
2. In the upper right corner, click Create campaign.
3. In the right panel, select Nurture as the campaign type.
4. In the right panel, enter a name for the campaign and set the start and end dates.
5. In the right panel, select the contacts or lists that you want to include in the campaign.
6. In the right panel, create the emails that you want to send in the campaign.
    6.1. Each email should have a clear objective and should be relevant to the target audience.
    6.2. The emails should be well-written and should be free of errors.
7. In the right panel, set the frequency of the emails.
    7.1. You can choose to send the emails daily, weekly, or monthly.

8. Click Save.

Once you have created the email nurture campaign, you can assign it to a HubSpot campaign by following these steps:

1. Go to the email nurture campaign that you want to assign to a HubSpot campaign.
2. In the upper right corner, click Settings.
3. In the left panel, select Campaigns.
4. Select the HubSpot campaign that you want to associate with the email nurture campaign.
5. Click Save.

The email nurture campaign will now be assigned to the HubSpot campaign. You can track the performance of the email nurture campaign in the HubSpot Marketing Hub dashboard.

Here are some additional tips for setting up and assigning email nurture campaigns to HubSpot campaigns:

- Use a clear and concise objective for each email in the campaign.
- Make sure that the emails are relevant to the target audience.
- Use a variety of content formats, such as text, images, and videos.
- Personalize the emails as much as possible.
- Track the performance of the campaign and make adjustments as needed.

Additional training resources:

- Lead nurturing with HubSpot
- 7 best practices for lead nurturing emails

☐ **Create a quick-apply form and embed is onto your landing page**
Note: This step requires access to your website CMS backend or access to whichever platform you are using to host your landing page. Also, all of the fields in your form will need to be created prior to creating the form. See here for creating HubSpot properties for your forms.

1. Go to Marketing > Lead Capture > Forms.
2. In the upper right corner, click Create form.

3. In the left panel, select Blank template to start with a blank form or a pre-made template to start with a form with pre-selected fields for a specific use case. The form preview for a selected template will appear in the right panel.
4. In the right panel, enter a name for the form and add the fields that you want to include in the form.
    4.1. Your quick-apply form should mirror the physical copy of your school's enrollment form. At a minimum, include any of the fields that would be *required* on the physical form.
5. In the right panel, customize the form by adding a header, footer, and branding.
6. In the right panel, select the campaign that you want to associate the form with.
7. In the upper right corner, click Save.

Once you have created the form, you can embed it onto your landing page by following these steps:

<u>HubSpot Landing Pages:</u>

6. Go to the HubSpot landing page where you want to embed the form.
7. In the editor, click on the Insert tab.
8. In the left panel, select Forms.
9. Select the form that you want to embed.
10. The form will be embedded onto your landing page.

<u>Non-HubSpot Landing Pages:</u>

7. Go to the HubSpot form that you just created.
8. Click on the Embed tab.
9. Copy the embed code.
10. Go to your landing page and open the HTML code.
11. Paste the embed code into the HTML code.
12. Save the HTML code and publish your landing page.

Here are some additional tips for creating and embedding lead generation forms in HubSpot:

- Use clear and concise field labels so that users know what information you are asking for.
- Make sure that the form is easy to use and that the fields are not too long or too complicated.
- Test the form on different devices and browsers to make sure that it works properly.
- Track the performance of the form to see how many leads it is generating.

Additional training resources:

- Create forms
- Customize form field options
- Set up form submission notifications

☐ **Create a workflow that will assign new leads to a recruiter**

1. Go to Automation > Workflows.
2. In the upper right corner, click Create workflow.
3. In the left panel, select From scratch.
4. In the right panel, enter a name for the workflow and select the list that you want to use as the trigger.
    4.1. The trigger is the event that will start the workflow. In this case, the trigger will be a new lead being added to the list.
5. In the right panel, select the action that you want to take. In this case, the action will be to assign the lead to a recruiter.
    5.1. You can select a specific recruiter or you can select a group of recruiters.
6. In the right panel, set the conditions for the workflow. In this case, you can set the condition to only assign leads that meet certain criteria, such as leads for a certain grade or leads for a specific school.
7. In the upper right corner, click Save.

Your workflow will now be created and will automatically assign new leads in the list to the recruiter that you specified.

Here are some additional tips for setting up workflows in HubSpot:

- Use clear and concise names for your workflows so that you can easily identify them later.
- Use a consistent naming convention for your workflows so that they are easy to organize.
- Use clear and concise conditions for your workflows so that they only trigger when you want them to.
- Test your workflows regularly to make sure that they are working properly.

Additional training resources:

- Create workflows
- Troubleshoot workflow enrollment issues

- [ ] **Use HubSpot's campaign reporting to track efforts**

1. Go to Reports > Reports.
2. In the upper right corner, click Create report.
3. In the Create reports from scratch section, select Campaign Reports.
4. In the left panel, select the campaign that you want to create a report for.
5. In the right panel, select the metrics and dimensions that you want to include in the report.
    5.1. Metrics are the data points that you want to measure, such as leads generated or website traffic.
    5.2. Dimensions are the categories that you want to group your data by, such as campaign type, source, or medium.
6. In the right panel, select the date range for the report.
7. In the right panel, select the format for the report.
    7.1. You can choose to export the report as a PDF, CSV, or Excel file.
    7.2. You can also choose to embed the report in a web page.
8. Click Create report.

Your report will now be created and you can view it in the Reports dashboard.

Here are some additional tips for creating campaign reports in HubSpot:

- Use clear and concise names for your reports so that you can easily identify them later.
- Filter your reports to focus on the data that is most important to you.
- Export your reports to share with others or to keep a historical record of your campaign performance.

Additional training resources:

- Analyze campaigns
- Analyze individual campaign performance

Thank you for reviewing our step-by-step guide. We appreciate your feedback. Please let us know if you find any inaccuracies or have any suggestions for improving this guide. You can send your feedback to jshaad@chartergrowthfund.org.

Creating a ‘Summer Melt’ nurture campaign for new families

Last updated: 9/22/2023
Time investment: 3-5 hours
Objective: Our objective is to keep enrolled families engaged over the summer months and prepare them for the first day of school.
Prerequisites or requirements:

- List of newly enrolled families
- Text for series of lead nurture emails

Required HubSpot tools:

- Lists
- Workflows
- Email

Why is this important: A summer nurture campaign is a surefire way to decrease FDOS no-show rates.
This setup is done on a computer and requires an internet connection. Access to your website’s content management system (CMS) and a HubSpot account with a subscription to all of the required features and tools is also required.
When is this done: Plan to execute this set up in the early spring right after the lottery and during the summer months. campaign.
Who does this: What’s outlined in this process is typically the responsibility of the marketing team. That said, this step-by-step guide is designed for anyone to use so long as prerequisites and requirements are met.

Procedure

- [ ] **Create a HubSpot list where your lead information will ‘live’**

1. Go to Contacts > Lists.
2. In the upper right corner, click Create list.
3. In the left panel, select Contact-based to create a list of contacts.
4. In the right panel, enter a name for the list and select if you want an Active list or a Static list.
   4.1. An active list is a dynamic list that automatically updates over time. It keeps adding contacts when the criteria are matched and removes them when they no longer meet the requirements.
   4.2. A static list does not update even if a new contact meets the criteria.
5. In the upper right corner, click Next.
6. In the left panel, set the criteria for the contacts you want to segment. You can select up to 250 filters per list.

   6.1. To learn more about the list criteria available to you and how they work, you can refer to this article: https://knowledge.hubspot.com/lists/create-active-or-static-lists.

7. In the upper right corner, click Save.

Your list will be created and you can start adding contacts to it.

Here are some additional tips for creating lists in HubSpot:

- Use descriptive names for your lists so that you can easily identify them later.
- Use a consistent naming convention for your lists so that they are easy to organize.
- Use clear and concise criteria for your lists so that you only add the contacts that you want to include.
- Review your lists regularly to make sure that they are still accurate and up-to-date.

Additional training resources:

- Create and use lists
- Export your lists
- Determine your list criteria

☐ **Create a HubSpot campaign and assign all assets to this campaign**

1. Go to Marketing > Campaigns.
2. In the upper right corner, click Create campaign > Start from scratch.
3. In the right panel, enter a name for the campaign.
4. In the right panel, select a campaign color.
5. In the right panel, select campaign owner.
6. In the right panel, set the start and end dates for the campaign.
7. In the right panel, enter a goal for the campaign.
8. In the right panel, enter an audience for the campaign.
9. (Optional) Select campaign currency.
10. Click Save.

A campaign asset is any piece of content that is associated with a campaign. This can include things like landing pages, email templates, social media posts, and even ads.

To assign assets to the campaign, follow these steps:

1. Click on the campaign that you want to assign assets to.
2. In the upper left corner, click Add assets.
3. In the left panel, select the assets that you want to associate with the campaign.
4. Click Save.

The assets that you assign to the campaign will be used to track the performance of the campaign. For example, if you assign a landing page to the campaign, HubSpot will track how many people visit the landing page and how many people convert into leads or applications.

Here are some additional tips for creating and assigning assets to HubSpot campaigns:

- Use descriptive names for your campaigns and assets so that you can easily identify them later.
- Use a consistent naming convention for your campaigns and assets so that they are easy to organize.
- Use clear and concise criteria for your campaigns and assets so that you only include the contacts or lists that you want to target.
- Review your campaigns and assets regularly to make sure that they are still accurate and up-to-date.

Additional training resources:

- Create campaigns
- Campaigns FAQ

☐ **Draft and set up 3-4 email nurture campaign series**
Note: Need draft emails before starting. Here are samples for a 4 series drip.
KIPP Northern California Welcome Email Example
KIPP SoCal Welcome Email Example
Sample 3 [non-KIPP example needed]

1. Go to Marketing > Email.
2. In the upper right corner, click Create campaign.
3. In the right panel, select Nurture as the campaign type.
4. In the right panel, enter a name for the campaign and set the start and end dates.
5. In the right panel, select the contacts or lists that you want to include in the campaign.
6. In the right panel, create the emails that you want to send in the campaign.
   6.1. Each email should have a clear objective and should be relevant to the target audience.

   6.2. The emails should be well-written and should be free of errors.
7. In the right panel, set the frequency of the emails.
   7.1. You can choose to send the emails daily, weekly, or monthly.
8. Click Save.

Once you have created the email nurture campaign, you can assign it to a HubSpot campaign by following these steps:

1. Go to the email nurture campaign that you want to assign to a HubSpot campaign.
2. In the upper right corner, click Settings.
3. In the left panel, select Campaigns.
4. Select the HubSpot campaign that you want to associate with the email nurture campaign.
5. Click Save.

The email nurture campaign will now be assigned to the HubSpot campaign. You can track the performance of the email nurture campaign in the HubSpot Marketing Hub dashboard.

Here are some additional tips for setting up and assigning email nurture campaigns to HubSpot campaigns:

- Use a clear and concise objective for each email in the campaign.
- Make sure that the emails are relevant to the target audience.
- Use a variety of content formats, such as text, images, and videos.
- Personalize the emails as much as possible.
- Track the performance of the campaign and make adjustments as needed.

Additional training resources:

- [Lead nurturing with HubSpot]
- [7 best practices for lead nurturing emails]

☐ **Use HubSpot's campaign reporting to track efforts**

1. Go to Reports > Reports.
2. In the upper right corner, click Create report.
3. In the Create reports from scratch section, select Campaign Reports.
4. In the left panel, select the campaign that you want to create a report for.

5. In the right panel, select the metrics and dimensions that you want to include in the report.
    5.1. Metrics are the data points that you want to measure, such as leads generated or website traffic.
    5.2. Dimensions are the categories that you want to group your data by, such as campaign type, source, or medium.
6. In the right panel, select the date range for the report.
7. In the right panel, select the format for the report.
    7.1. You can choose to export the report as a PDF, CSV, or Excel file.
    7.2. You can also choose to embed the report in a web page.
8. Click Create report.

Your report will now be created and you can view it in the Reports dashboard.

Here are some additional tips for creating campaign reports in HubSpot:

- Use clear and concise names for your reports so that you can easily identify them later.
- Filter your reports to focus on the data that is most important to you.
- Export your reports to share with others or to keep a historical record of your campaign performance.

Additional training resources:

- Analyze campaigns
- Analyze individual campaign performance

Thank you for reviewing our step-by-step guide. We appreciate your feedback. Please let us know if you find any inaccuracies or have any suggestions for improving this guide. You can send your feedback to jshaad@chartergrowthfund.org.

Creating a School-Tours Journey for New Families

Last updated: 9/22/2023
Time investment: 3-5 hours
Objective: Our objective is to create an easy, measurable way for families to schedule a school tour with a recruiter.
Prerequisites or requirements:

- Connect your calendar to HubSpot's meeting scheduler

Required HubSpot tools:

- Meeting Scheduler
- Workflows
- Email

CSGF Live Demo:

- [insert link to CSGF live demo]

Why is this important: A summer nurture campaign is a surefire way to decrease FDOS no-show rates.
This setup is done on a computer and requires an internet connection. Access to your website's content management system (CMS) and a HubSpot account with a subscription to all of the required features and tools is also required.
When is this done: Plan to execute this set up in the early spring right after the lottery and during the summer months. campaign.
Who does this: What's outlined in this process is typically the responsibility of the marketing team. That said, this step-by-step guide is designed for anyone to use so long as prerequisites and requirements are met.

Procedure

- [ ] **Create a HubSpot account for the recruiter leading school tours**

    1. Go to Settings > Users & teams.
    2. Click the Create user button.
    3. Enter the user's email address and name.
    4. Select the permissions that you want to give the user.
    5. Click the Create button.

    The user will receive an email with a link to activate their account. Once they have activated their account, they will be able to log in to HubSpot and start using it.

    Here are some additional things to keep in mind when creating a user account in HubSpot:

- You can create multiple user accounts for different roles in your organization, such as recruiter, marketing, and social media manager.
- You can give each user different permissions, depending on their role.
- You can also create groups of users, so that you can easily manage their permissions and access to different features.

Additional training resources:

- Add HubSpot users

☐ **Create scheduling landing page**

1. Go to Sales > Meetings.
2. Click the Create scheduling page button.
3. Select page type.
4. Enter the title and description for the page.
5. (Optional) Select the calendar that you want to use for the page.
6. (Optional) Select the days and times that you are available for meetings.
7. (Optional) Add a video conference link.
8. (Optional) Add a form to collect additional information from your visitors.
9. Click the Create button.

Once you have created the widget, you will see a code snippet. This is the code that you need to embed in your website or email.

To embed the widget, copy the code snippet and paste it into the HTML code of your website or email.

Here are some additional things to keep in mind when creating a HubSpot meeting scheduling page:

- The page can be embedded on your website or in an email.
- The page can be tracked to see how many people are visiting it and how many meetings are being booked.

Here are some additional tips for creating a successful HubSpot meeting scheduling page:

- Make sure the title and description are clear and concise.
- Select the days and times that you are most likely to be available.
- Add a form to collect additional information from your visitors, such as their name, email address, and phone number.

- Customize the page with your branding and colors.

Additional training resources:

- Create scheduling page with the meetings tool
- Embed the scheduler widget

Thank you for reviewing our step-by-step guide. We appreciate your feedback. Please let us know if you find any inaccuracies or have any suggestions for improving this guide. You can send your feedback to jshaad@chartergrowthfund.org.

Responsibilities + Training Matrix by Role

Section aim: This section outlines the roles and responsibilities associated with the strategies outlined in this playbook along with links to recommended training resources.

Key points and/or takeaways:

- This work requires close coordination across multiple school functions. Marketing and Operations are likely most impacted.
- Marketing is typically responsible for top-of-funnel efforts focused on generating leads and applications (e.g., getting families to the forms).
- Recruitment is usually responsible for lead follow-up and the logistics involved with enrolling new families (e.g., everything after a family fills out a form).

To execute these strategies using these tools you'll likely need a coordinated effort between the marketing and recruitment teams. (We recognize for a lot of us that they are the same person.) In any case, the following outlines the roles and responsibilities you can expect when executing this strategy.

This is not a one-size-fits-all approach. Distribute responsibilities among your team in a way that makes sense for your team and your goals.

Marketing

Marketing is ultimately responsible for filling the top of the enrollment marketing funnel with new families (i.e., leads). In HubSpot, this looks like…

- Creating the marketing assets in landing pages, forms, and nurture emails
- Embedding forms on landing pages and tracking conversions
- Creating lists
- Creating workflows for lead assignment
- Drafting and setting up automated email nurture campaigns

Operations / Recruitment

Recruitment, often a function of an organization's Operations team, is responsible for 1:1 touchpoints like lead-follow-up phone calls and text messages, and assisting families through the application and enrollment process. In HubSpot, this looks like…

- Signing in and checking for new lead assignments daily
- Noting follow-up attempts and interactions families
- Noting the status of a family (e.g., New Lead, Applied, etc.)
- Transferring quick-apply form data into an enrollment system

- Reporting on team activity and conversion rate

IT

The IT team plays a key role in the implementation and management of HubSpot. They are responsible for the technical aspects of the project, such as connecting your domain, setting up your email, and installing the HubSpot pixel on your website. They will also work with you to develop a data strategy and ensure that your data is managed appropriately. In HubSpot, IT's role looks like…

- Initial setup of HubSpot: integrating domains, email clients, analytics, etc.
- Designing a HubSpot data strategy
- Creating and managing users and permissions

Training Matrix

If you are new or want to brush up on your HubSpot skills, we recommend investing time in the following HubSpot-created courses. We've separated the courses by role but we encourage you to check out all of them if you have the time.

Role	Training Title	Subject	Time Commitment
Marketing Team	Social Media Marketing Certification Course	Social Media	6 hours
Marketing Team	Introduction to Social Media Advertising	Social Media	30 minutes
Marketing Team	Email Marketing Certification Course	Email Marketing	5 hours
Marketing Team	Measuring the Success of Your Email Marketing Efforts	Email Marketing	20 minutes
Marketing Team	Testing Your Marketing Emails	Email Marketing	30 minutes
Marketing Team	Outlining the Design of Your Marketing Emails	Email Marketing	30 minutes
Marketing Team	Introduction to Lead Management	Conversion	30 minutes
Marketing Team	Building Custom Reports in HubSpot	Reporting	2 hours
Marketing Team	Creating Forms in Hubspot	Lead Generation	30 minutes
Marketing Team	Creating Landing Pages in HubSpot	Lead Generation	30 minutes
Marketing Team	Building an Effective Automation Strategy in HubSpot	Lead Generation	35 minutes
Marketing Team	Workflows (automation) Deep Dive	Lead Generation	1 hour
Marketing Team	Understanding Workflows in HubSpot	Conversion	30 minutes
Recruitment Team	Introduction to Lead Management	Conversion	30 minutes

Recruitment Team	Mastering the Basics of Sales Hub Starter	Conversion	1 hour
Recruitment Team	HubSpot Sales Software	Conversion	2 hours
Recruitment Team	Increasing Your Efficiency With Email Templates, Documents, and Snippets	Conversion	10 minutes
Recruitment Team	Closing Sales in HubSpot	Conversion	30 minutes

Glossary & HubSpot Tools

Glossary

This playbook covers both strategic and technical terms that are important to know before getting started. We recommend familiarizing yourself with the following terms before continuing on with this playbook.

Term	Definition
CRM	CRM stands for Customer Relationship Management. It is a system that helps schools manage their interactions with families and potential families. CRM systems typically store information about families, such as their contact information and preferences. This information can be used to track customer interactions, identify opportunities, and improve customer service.
HubSpot	HubSpot is a CRM platform that offers a suite of software tools for marketing, sales, and customer service, all of which are integrated with a powerful CRM at the core. HubSpot can be used to track touchpoints with families from the moment they first interact with you, all the way through to the application and beyond.
Marketing Automation	Marketing automation is the use of software to automate marketing tasks. This can include tasks such as email marketing, social media marketing, lead generation, and lead nurturing. Marketing automation can help networks save time and resources, and it can also help them improve the effectiveness of their marketing campaigns.
Email Nurture Campaign	An email nurture campaign is a series of emails that are sent to a lead over time with the goal of moving them closer to becoming a customer. The emails are typically personalized and relevant to the lead's interests, and they are designed to educate, inform, and engage the lead.
Quick-Apply Form	A quick-apply form is a digital version of a school enrollment form that is designed to make it easier and faster for families to apply. Quick-apply forms typically require the same information that is required on a physical version of a school application.
Family Journey aka Journey	A “family journey” is the path that a family takes from the moment they first become aware of your school to the moment they enroll or reenroll. It includes all of the touchpoints that a family has with

	your school, both online and offline.
Summer Melt	A phrase used to describe the period of time over the summer months when schools may lose touch with a family or they find a new school for their child(ren).
Drip Campaign (Email and/or Text Message)	An email or text message drip campaign is a series of automated messages sent to a contact list based on a set schedule or user action. The goal of a drip campaign is to nurture leads over time by providing them with valuable content and information.

HubSpot Tools

HubSpot is a powerful platform with a ton of features. It can be easy to get overwhelmed by all of the options, especially if you are new to HubSpot. To avoid that feeling of being overwhelmed, start by familiarizing yourself with only those features and tools that we will use throughout this playbook.

Access to HubSpot tools varies depending on your subscription and user permissions. Please consult with your HubSpot administrator if you have any questions about accessing any of the tools listed below.

Tool	**Definition**
Lists	HubSpot lists are a powerful way to segment your contacts based on shared characteristics. This can help you send targeted marketing messages, create workflows, and run reports. New-to-network leads and existing families are two examples of commonly used lists.
Forms	HubSpot forms are a powerful tool that allows you to collect contact information from your website visitors. With HubSpot forms, you can create custom forms that collect the information you need, such as name, email address, phone number, and company. Once you've created your form, you can embed it on your website or share it as a standalone link.
Landing Pages	HubSpot landing pages are a type of landing page that can be created and managed using the HubSpot marketing software platform. They are designed to be easy to use and effective at converting website visitors into leads.
Email	HubSpot's email tool is a powerful email marketing platform that helps organizations of all sizes create, send, and track email campaigns. It

	offers a variety of features that make it easy to create professional-looking emails, segment your lists, and track your results.
Workflows	HubSpot workflows are a powerful tool that allows you to automate your marketing, sales, and customer service processes. With workflows, you can create a series of actions that will be taken automatically when a certain trigger event occurs. For example, you could create a workflow that sends a welcome email to a family that filled out a quick-apply form, or that creates a reminder for your recruiters.
Ads Management	HubSpot's Ads Manager tools are a suite of features that allow you to create, manage, and optimize your paid advertising campaigns across multiple channels, including Google Ads, Facebook Ads, and LinkedIn Ads.
Social Media Management	HubSpot's social media manager tool is a suite of features that allows you to manage your social media presence across multiple platforms, including Facebook, Twitter, LinkedIn, and Instagram. With HubSpot's social media manager tool, you can create and schedule posts, track performance, engage with your audience, and measure ROI.
Meetings Tool	HubSpot Meetings is a tool that allows you to easily book meetings with prospective families. It integrates with your existing calendar so that you can keep track of your meetings seamlessly.

Appendix

Email Example 1. KIPP NorCal Nurture Email Example

CHARTER SCHOOL GROWTH FUND

KIPP Public Schools
PENINSULA

Dear **Parent,**

Thank you for choosing KIPP! Someone from our team will be reaching out to you soon.

We are proud to provide joyful, academically excellent schools that prepare students with the skills and confidence to pursue the paths they choose—college, career and beyond. Our school leaders, teachers, and school staff are committed to providing a safe and supportive learning environment to ensure growth and achievement.

Apply now for the 2023-24 academic year

Submit an application

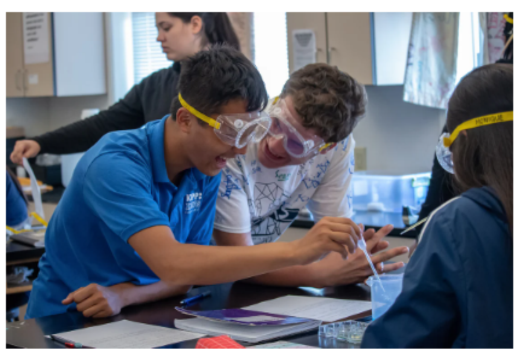
Questions? Contact our KIPP team
Samantha Cruz, samantha.cruz@kippnorcal.org

Learn more about each of our schools in the Peninsula.

KIPP Valiant Community Prep **(TK-8)**
2033-A Pulgas Avenue
East Palo Alto, CA 94303
info@kippvaliant.org

KIPP Excelencia Community Prep **(TK-8)**
2950 Fair Oaks Ave
Redwood City, CA 94063
info@kippecp.org

KIPP Esperanza High School **(9-12)**
1039 Garden St.
East Palo Alto, CA 94303
info@kippesperanza.org



KIPP Public Schools Northern California, 1000 Broadway Ste 460, Suite 460, Oakland, CA 94610
Unsubscribe Manage preferences

Email Example 2. KIPP SoCal Welcome Email Example

KIPP SoCal
PUBLIC SCHOOLS

Thank you for your interest in KIPP SoCal Public Schools! A member of our team will be reaching out to you shortly to discuss school options for your student and answer any questions you may have.

- **If you'd like to contact a particular school, please refer to this list of our current schools and their direct numbers.**
- **If you are interested in applying, you can do so online through our application portal!**

With gratitude,

KIPP SoCal Public Schools

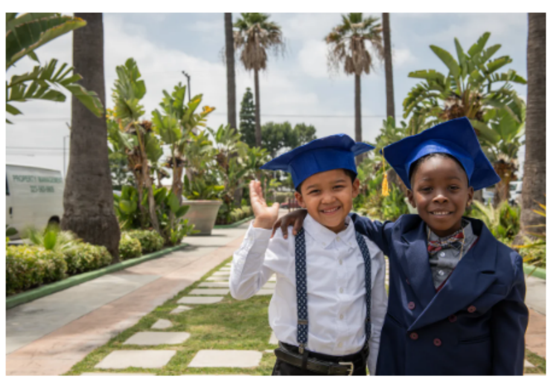
Apply to KIPP!

¡Gracias por su interés en las Escuelas Públicas de KIPP SoCal! Un miembro de nuestro equipo se comunicará con usted en breve para hablar de las opciones escolares para su estudiante y responder cualquier pregunta que usted pueda tener.

- **Si desea comunicarse con una escuela en particular, consulte esta lista de nuestras escuelas actuales y sus números directos.**
- **Si está interesado en aplicar, ¡puede hacerlo en línea a través de nuestro portal de solicitudes!**

Con gratitud,
Escuelas Públicas de KIPP SoCal

Aplicar a KIPP!



KIPP SoCal Public Schools, 1933 S. Broadway St., Suite 1144, Los Angeles, California 90007, United States, (323) 647-8898
Unsubscribe Manage preferences