



Tracking Inquiries and Data Using Google Drive

Tracking all inquiries to your school is vital to a successful enrollment management plan. When a potential new family calls, visits your school web site, or even drops by the school office unannounced, a clear plan must be in place to stay in touch throughout the recruitment and admissions process.

While a paper-based approach is okay, using a computer to track this information allows you to review and use the data more effectively. Many schools find using a dual approach - having a paper copy to start, then entering it into a spreadsheet or database - is most effective.

No matter which method or mix you use, there are several key data points that must be collected from anyone who inquires about your school. **Every person who answers the school telephone or welcomes visitors in the school office must be trained to collect as much of this information as possible when someone inquires.** There is no excuse for letting a potential new family get away without obtaining at the very least a way for you to get back in touch with them. Ideally, after a new family contacts your school you should have asked them:

- Parents names
- Address
- Phone Number(s)
- Child(ren)'s Name(s)
- Child(ren)'s Date(s) of Birth
- Grade(s) entering
- Current School
- How did you hear about us?



Here is a sample template of a paper form that can be used to collect the key data points when someone inquires with your school. An editable version (Word document) can be found on the Toolkit website.

[School Name] Inquiry Form

Date: _____ Inquiry Type: <input type="checkbox"/> Phone <input type="checkbox"/> Personal Visit <input type="checkbox"/> Website <input type="checkbox"/> E-mail <input type="checkbox"/> Other: _____			
Parent Name(s): _____			
Address: _____			
Phone: _____			
E-Mail: _____			
Children:			
Name: _____		Name: _____	
Grade Entering/Birth Date: _____		Grade Entering/Birth Date: _____	
Current School Attending: _____		Current School Attending: _____	
Name: _____		Name: _____	
Grade Entering/Birth Date: _____		Grade Entering/Birth Date: _____	
Current School Attending: _____		Current School Attending: _____	
How did you hear about us?			
<input type="checkbox"/> We are parishioners here		<input type="checkbox"/> Outdoor Posters	<input type="checkbox"/> Newspaper Ad
<input type="checkbox"/> Received a mailing		<input type="checkbox"/> Flyer in Business	<input type="checkbox"/> Online Search
<input type="checkbox"/> Referred By: _____		<input type="checkbox"/> Drove By	<input type="checkbox"/> Word of Mouth
		<input type="checkbox"/> Other: _____	

Once obtained in written form, this information should be entered in to some type of tracking tool or database. In addition to the contact information, the tracking tool will help you document when a potential family achieves milestones along the admissions and enrollment process (i.e. tour, open house, event attendance, application, acceptance, enrollment).

If you do not already have access to some type of database for tracking inquiries, Google Drive is one free resource that can be used to set up your tracking system. (Note: you will need a Google account to use Google Drive – [click here to learn how to set one up](#).)

Here is an [example of a simple Google Form](#) that is connected with [this Google Spreadsheet](#). When you enter data into your Google Form, it automatically appears in the spreadsheet. From there you can add further notes and keep track when families have applied, been accepted and completed the enrollment process. By moving the data row from the "Form Responses" (Inquiries) tab, to the "Applied," "Accepted" and/or "Enrolled" Tab.

You can even track your current families' re-enrollment in the same spreadsheet file. The Google Spreadsheet is also downloadable into Microsoft Excel.



Note: A video tutorial is available to help you with this tool:

<http://youtu.be/dBHVEycdlnc>

If you would like to start with a copy of this [sample Google Form](#), simply log into Google Drive using your Google account ([you can set one up for free if you don't have one already](#)), and follow these easy steps:

1. Click on [this shared spreadsheet](#).
2. When you see the spreadsheet open, click on "File...Save a Copy" from the drop down menu.
3. Give your spreadsheet whatever name you wish, and click OK. You have just saved your own tracking spreadsheet!
4. The "Share" button at the upper right of the screen allows you to choose who can access the spreadsheet, with permission to either view or edit the data. By default, your new spreadsheet is Private (only you can view and edit while logged into your Google Drive account). It may be beneficial to allow access to key members of your enrollment management team, to provide instant updates when new families inquire, apply and enroll.
5. Now, click on "Form..Edit Form" from the drop down menu.
6. Give your form a new name. Here you can add your school logo and make any changes you wish to the fields, etc.
7. Click on "View live form" or "Send Form" to view your form and see the link that can be used for data entry by your enrollment management data manager.

