


Client Processes Playbook





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About Us:

Outsource Access is a comprehensive “business process outsourcing” and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their “Growth Partner” helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

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SALES



Task | Engaging with Potential Families/Students on LinkedIn

Description of the Task: Actively reaching out and engaging with potential students and families through LinkedIn, leveraging the platform to build connections and showcase the educational institution's offerings. By maintaining meaningful interactions, the goal is to foster relationships that lead to inquiries and eventual enrollment. Engaging with prospects on LinkedIn is vital for expanding the institution's reach.

1. Use LinkedIn Sales Navigator to refine your search for prospects based on industry, job title, location, and other relevant filters.
2. Create a list of potential leads by exporting the filtered results from Sales Navigator. Ensure the list includes names, job titles, companies, and LinkedIn profiles.
3. Conduct thorough research on each prospect. Review their LinkedIn profiles, company websites, recent posts, and any other relevant information to understand their interests and pain points.
4. Craft personalized connection requests for each prospect, mentioning a specific detail about their profile or a shared interest to increase acceptance rates.
5. Send out connection requests in batches, ensuring not to exceed LinkedIn's daily limit to avoid restrictions on your account.
6. Allow a few days for prospects to accept your connection requests. Keep track of accepted connections and those that are still pending.
7. Once a connection is accepted, send a personalized welcome message thanking them for connecting and briefly introducing yourself and your business.
8. Regularly engage with your prospects' content by liking, commenting, and sharing their posts to build rapport and increase visibility.
9. Post relevant content on your LinkedIn profile, such as industry insights, case studies, and educational resources, to establish yourself as a thought leader in the education management industry.
10. Based on your research and interactions, identify common pain points and challenges faced by your prospects in the education management industry.
11. Develop personalized outreach messages addressing the identified pain points and offering solutions or insights that your business can provide.
12. Send personalized outreach messages to your prospects, ensuring to keep them concise, relevant, and value-driven.
13. Keep track of your outreach efforts, responses, and engagement rates. Analyze the data to refine your approach and improve your outbound prospecting strategy over time.

Task | Managing and Updating Contact Development Systems

Description of the Task: Regularly maintaining and updating the institution's CRM or contact database to ensure the most accurate information on families, students, and prospects. This step is crucial for streamlining communication and tracking interactions, ensuring no potential lead is overlooked. An efficient contact development system enables seamless follow-ups and efficient lead nurturing.

1. Gather information on key Development Management professionals within the education management industry. Use LinkedIn, company websites, and industry directories to compile a list of relevant contacts.
2. Organize the researched contacts into a structured list including names, titles, companies, email addresses, and phone numbers.
3. Craft a compelling and concise pitch that highlights the purpose of your outreach. Ensure it aligns with the goals defined in step 1. Include key points that will grab their attention.
4. Assemble any necessary documents that might support your pitch, such as a company profile, case studies, proposals, or brochures. Ensure they are professionally designed and formatted.
5. Write a professional and personalized email template. Include an engaging subject line, a brief introduction, the main pitch, and a call to action. Ensure it can be easily customized for each contact.
6. Tailor the email template to each individual contact. Mention specific details relevant to them or their organization to make the outreach more personalized.
7. Begin sending the personalized emails to the contacts on your list. Use a customer relationship management (CRM) tool if available to manage and track the email outreach.
8. Develop a follow-up strategy for contacts who do not respond initially. Decide on the frequency and content of follow-up emails or calls.
9. If no response is received after the initial email, follow up with a phone call. Prepare a brief script to ensure you cover all key points during the conversation.
10. Keep a detailed record of all responses received. Note down any feedback, meeting requests, or additional information provided by the contacts.
11. Arrange meetings with interested contacts. Use a scheduling tool to find mutually convenient times and send calendar invites.
12. Plan the agenda for each meeting. Prepare any additional documents or presentations required. Familiarize yourself with the contact's background and their organization.
13. Send a thank-you email after each meeting, summarizing the key points discussed and outlining the next steps. Ensure any agreed-upon actions are followed through promptly.

Task | Developing and Implementing Lead Tracking Systems for Prospective Families

Description of the Task: Setting up a systematic approach to monitor and manage prospective student and family inquiries. It involves tracking the journey from initial contact to enrollment, ensuring that each lead is followed up with appropriate touchpoints. A robust lead tracking system helps the admissions team stay organized, prevents leads from falling through the cracks, and improves conversion rates

1. Customize the fields in the CRM to capture relevant information about prospective families, such as contact details, family size, interests, and stage in the decision process.
2. Create forms for capturing lead information both online (via the website) and offline (during events or in-person meetings).
3. Ensure that all lead capture forms are integrated with the CRM so that information is automatically recorded and updated in the system.
4. Provide training to all relevant staff on how to use the CRM, input data, and follow the new lead tracking process.
5. Develop a lead scoring system to prioritize leads based on factors such as level of interest, likelihood to convert, and urgency of follow-up.
6. Implement automated workflows in the CRM to assign tasks, send follow-up emails, and schedule reminders based on lead activities and status.
7. Write a detailed guide outlining each step of the lead tracking process, including how to enter information, update records, and follow up with leads.
8. Designate team members responsible for managing and following up with leads. Ensure each lead has a clear point of contact.
9. Regularly review the status of leads in the CRM, ensuring that follow-ups are conducted timely and no leads fall through the cracks.
10. Schedule regular meetings with the team to discuss lead statuses, challenges, and opportunities. Use these check-ins to refine the process as needed.
11. Periodically analyze the data collected in the CRM to identify trends, measure the effectiveness of the lead tracking process, and make data-driven decisions.
12. Establish a feedback loop where team members can suggest improvements to the lead tracking process, ensuring continuous enhancement and efficiency.



MARKETING

Task | Designing and Executing Digital Marketing Strategies

Description of the Task: Crafting comprehensive digital marketing strategies aimed at increasing the institution's visibility and attracting prospective students and families. It includes SEO optimization, targeted online ads, and email marketing campaigns. In the education management industry, effective digital strategies are critical for driving enrollment, and highlighting the institution's programs

1. Conduct thorough market research to understand your target audience.
2. Perform a competitive analysis to understand what your competitors are doing well and where they fall short. Analyze their websites, social media presence, content strategies, and digital advertising efforts.
3. Review your existing digital channels and performance. This includes your website, social media accounts, email campaigns, and online advertising. Identify what's working and what needs improvement.
4. Based on your audience and goals, select the most appropriate digital marketing channels. This may include SEO, content marketing, social media, email marketing, PPC, and influencer marketing.
5. Plan a content calendar outlining the type of content you will create, how often you will post, and which platforms you will use. Content types may include blog posts, videos, infographics, eBooks, and social media updates.
6. Ensure your website is optimized for search engines. This includes keyword research, on-page SEO (title tags, meta descriptions, headings), technical SEO (site speed, mobile-friendliness), and off-page SEO (backlinks).
7. Choose the social media platforms most relevant to your audience. Develop a posting schedule, determine the type of content to share, and set engagement goals.
8. Build an email list and segment your audience based on their interests and behaviors. Create a series of email campaigns, including newsletters, promotional offers, and automated follow-ups. Use tools like Mailchimp or Constant Contact.
9. Create PPC campaigns on platforms like Google Ads and social media networks. Determine your budget, select target keywords, design ad creatives, and set up conversion tracking.
10. Identify influencers in your industry who align with your brand values. Develop partnerships for sponsored content, product reviews, or social media takeovers. Track the performance of these collaborations.
11. Set up tools like Google Analytics, Google Search Console, and social media insights to monitor your digital marketing performance. Track key metrics such as website traffic, conversion rates, and ROI.
12. Regularly review your digital marketing performance and compare it to your goals. Use the insights gained to adjust your strategy, optimize campaigns, and improve results.
13. Prepare regular reports summarizing your digital marketing activities and their outcomes. Reflect on what worked well and what didn't, and use this information to inform future strategies.

Task | Creating and Managing Social Media Content

Description of the Task: Developing and curating engaging content for various social media platforms to highlight the educational institution's culture, achievements, and offerings. Regular posting, interaction with followers, and storytelling through visuals and posts are key aspects. In education management, consistent and engaging social media presence helps the institution connect with prospective students and families.

1. Identify target audiences like prospective families, current students' parents, and educational partners. Understand their content preferences and the platforms they use.
2. Develop a content calendar aligned with the academic year and key school events, scheduling posts on platforms like Instagram, Facebook, and LinkedIn.
3. Plan a variety of content types such as announcements, event promotions, educational tips, and student or teacher highlights.
4. Create visually engaging educational content using tools like Canva or Adobe Spark, ensuring designs align with school branding and educational goals.
5. Write informative, engaging captions, and incorporate relevant hashtags such as #EducationForAll and #ParentInvolvement.
6. Encourage interaction by asking questions or inviting parents and the community to share their experiences.
7. Actively monitor comments, messages, and mentions on social media platforms to promptly respond and engage with families.
8. Foster a strong online community by addressing feedback, answering questions, and building relationships with parents and stakeholders.
9. Track social media performance using analytics tools (e.g., Facebook Insights, Instagram Analytics) to monitor metrics like likes, shares, and engagement.
10. Analyze which content performs best and identify optimal posting times and days.
11. Adjust the content strategy based on performance data, focusing on content that resonates most with families and the community.
12. Regularly review trends in engagement and modify content and schedules to improve outreach efforts.
13. Compile monthly reports on social media performance, sharing key insights with school leadership to refine strategies.
14. Continuously optimize content types and posting schedules based on feedback, performance, and school goals.

Task | Administering and Monitoring Social Media Marketing Campaigns

Description of the Task: Setting up, running, and continuously monitoring social media marketing campaigns targeted at potential students, parents, and community stakeholders. By analyzing campaign performance through metrics like engagement, reach, and conversion, adjustments are made to improve results. These are crucial for reaching broader audiences, increasing enrollment inquiries, and maintaining competitive visibility.

1. Ensure all social media profiles (Facebook, Instagram, LinkedIn, etc.) are complete and up-to-date with consistent branding, including logos and contact details.
2. Develop a content calendar outlining what to post, focusing on school events, academic achievements, and industry trends, while planning for holidays and admission deadlines.
3. Write and design engaging content tailored to resonate with current and prospective students, parents, and alumni.
4. Schedule posts using tools like Buffer or Hootsuite to ensure timely content delivery according to the content calendar.
5. Monitor comments, messages, and mentions across all social platforms regularly.
6. Respond promptly to inquiries, engage with followers, and manage customer service issues to foster community and trust.
7. Review social media analytics weekly to track performance indicators such as reach, engagement rates, and follower growth.
8. Analyze data to determine which types of content resonate best with the audience and adjust strategies accordingly.
9. Collect email addresses through social media campaigns and website sign-ups, offering lead magnets to encourage sign-ups.
10. Design and send regular newsletters using platforms like Mailchimp, including school updates, enrollment deadlines, and community events.
11. Update the school website regularly with new content, such as blog posts and announcements, and share this across social media to drive traffic.
12. Share progress updates with the marketing and admissions teams to review campaign effectiveness and gather feedback.
13. Stay informed about the latest social media trends and best practices in the education industry.
14. Test different content formats (videos, polls, infographics) to diversify engagement strategies.
15. Maintain a crisis communication plan to address any negative feedback or issues that may arise on social media promptly.

Task | Producing Educational Videos for Family and Community Outreach

Description of the Task: Creating high-quality, informative videos to communicate with families, prospective students, and the broader community. These videos can showcase student success stories, highlight campus life, or explain the institution's values and programs. Video content is a powerful tool for storytelling that helps foster a deeper engagement with its audience.

1. Identify an engaging topic that aligns with the educational goals of the institution and addresses the needs of families and the community, such as student resources, program highlights, or expert insights.
2. Develop a comprehensive outline for the video content, breaking down the main topics into key points. Ensure that the outline flows logically and highlights essential information relevant to the audience.
3. Craft a script that conveys the message in a clear and concise manner. Use educational language appropriate for the audience, ensuring it is informative and engaging while avoiding jargon.
4. Collect any educational resources needed for the video, such as textbooks, presentation slides, images, and statistics. Ensure all materials are current and relevant to the topic being discussed.
5. Decide on the visual elements that will enhance the video, including graphics, animations, and on-screen text that can help illustrate key concepts and keep viewers engaged.
6. Select the appropriate tools and software for video creation, including high-definition cameras, quality microphones, editing software like Adobe Premiere Pro or Final Cut Pro, and animation tools such as Canva or After Effects.
7. Follow the script during the recording process, ensuring high-quality audio and visuals. Pay attention to lighting and background noise, and strive for a professional appearance that reflects the institution's values.
8. Use editing software to refine the content, incorporating visual elements, transitions, and background music to enhance the overall viewing experience. Trim unnecessary sections to maintain viewer engagement.
9. Include subtitles and captions in the video to make it accessible to all audiences, including those with hearing impairments. This inclusion supports inclusivity and broadens the video's reach.
10. Conduct a thorough review of the video, checking for factual accuracy, clarity, and engagement. Seek feedback from colleagues or stakeholders to ensure the content resonates with the intended audience.
11. Based on feedback, make necessary revisions to improve the video's quality and effectiveness. This may involve adjusting audio levels, modifying visuals, or refining the script.
12. Develop a promotion strategy to share the video widely through various channels. Utilize social media platforms, newsletters, the school website, and educational forums to reach families and the community.
13. Encourage viewers to engage with the video by leaving comments or questions. Respond to these interactions to foster a sense of community and to gather insights for future content.
14. After publishing, monitor the video's performance metrics, such as views, engagement rates, and feedback. This data will inform the effectiveness of the outreach efforts.
15. Based on the insights gained from the current video, brainstorm and outline ideas for future educational videos that will continue to meet the needs of families and the community.



OPERATIONS

Task | Managing Student Health Records Using ProCare

Description of the Task: Overseeing student health records in ProCare, ensuring accurate and secure documentation of health-related data. This is crucial for tracking immunizations, medications, and allergies, promoting student safety and well-being. Maintaining these records facilitates effective communication with parents and healthcare providers, fostering a healthier school environment.

Adding New Account and Enrollee

1. Open the ProCare software and enter your credentials to log in securely.
2. Navigate to the appropriate school for which you are adding a new enrollee.
3. Go to the "Family Data and Accounting" section in the main menu.
4. Click on the "Account" section, then select "Add Account."
5. Input the New Account Key, which consists of the first four letters of the child's last name, and click "Add."
6. Fill in the parent's personal information, including their name, address, and phone number, then click "Save."
7. Click on "Add Child" to enter the child's personal details, ensuring accuracy, and then click "Save" before exiting.
8. After the account creation, send a message to the designated staff members to inform them about the new enrollee and the ProCare account setup.

Immunization & Medical Records Updating

1. Start by opening the ProCare software and logging in with your credentials.
2. Choose the center where the child's medical records need to be updated.
3. Go to the "Family Data & Accounting" section within the system.
4. Click on the family name of the child whose records you want to edit, then navigate to "Immunization/Requirements."
5. For each immunization section, enter the dates of the latest vaccinations given to the child.
6. Click on the "Requirements" section to enter the dates of the most recent physical examination.
7. After all entries are complete, click "Save" to ensure that the updated records are stored in the system, then click "Exit" to leave the record.

Task | Coordinating Email and Calendar Systems

Description of the Task: Managing and synchronizing email and calendar systems to optimize communication among faculty, staff, students, and families. This includes setting up shared calendars for events and deadlines while ensuring timely responses to inquiries. Streamlining these processes minimizes scheduling conflicts, enhances collaboration, and keeps everyone informed.

1. Organize your email inbox by creating folders and labels for different types of communications, such as urgent matters, follow-up tasks, projects, and client communications. This structure will help streamline your workflow.
2. Implement filters in your email system to automatically sort incoming emails into their designated folders. This automation minimizes clutter and allows for easier access to relevant messages.
3. Regularly check your email inbox and review incoming messages. Prioritize them based on urgency and importance to ensure critical communications are addressed promptly.
4. Identify high-priority emails and flag them for immediate action. Respond to these emails or delegate them to appropriate team members, ensuring that urgent matters are managed effectively.
5. Designate specific times during the day to check and respond to emails. This practice helps maintain focus on other tasks and prevents constant disruptions from email notifications.
6. Avoid the habit of constantly checking your email. This enhances productivity and allows for deeper engagement in ongoing projects and responsibilities.
7. For common queries and routine communications, draft standard responses. This saves time and ensures consistency in your messaging.
8. Create templates for frequently sent emails. While using templates, personalize them as needed to maintain a human touch and connection with recipients.
9. Use your calendar system to schedule meetings, appointments, and important deadlines. Ensure that all relevant details, such as meeting agendas, locations, and attendees, are included.
10. Establish reminders for important deadlines and meetings at appropriate intervals (e.g., 15 minutes, 1 hour, 1 day in advance) to stay organized and prepared.
11. Customize your reminder settings based on personal preferences and the significance of events. This ensures you remain aware of upcoming commitments.
12. Monitor the responses to sent emails. Keep track of follow-ups for unresponded messages to ensure that no critical communication is overlooked.
13. Use follow-up reminders for emails that require a response. This proactive approach helps maintain communication and ensures timely responses.
14. Continuously update your calendars with new appointments, deadlines, and any changes to existing commitments. This keeps your schedule accurate and up-to-date.
15. If meetings or appointments need to be rescheduled, promptly communicate these changes to all involved parties to avoid confusion.
16. If collaborating with others, coordinate shared calendars to avoid double bookings and scheduling conflicts, ensuring smooth collaboration among team members.
17. Periodically assess your email and calendar management process to identify areas for improvement and to enhance overall efficiency.

Task | Maintaining and Optimizing Educational Database Management

Description of the Task: Managing and improving educational database systems that track student information and performance metrics. This involves ensuring data accuracy, security, and accessibility. By optimizing these systems, you enable efficient reporting and analysis, supporting data-driven decision-making and strategic planning that ultimately enhances student outcomes and addresses diverse learning needs.

1. Log in to the educational database management system using your credentials, ensuring you have the necessary permissions to make updates and optimizations.
2. Perform routine audits of the database to identify and rectify any inaccuracies, duplicates, or outdated information. This step is crucial for maintaining data integrity and reliability.
3. Regularly update records for students, faculty, and staff. This includes adding new enrollments, updating contact information, and ensuring that records reflect current statuses (e.g., graduation, transfers).
4. Establish and adhere to best practices for data entry to ensure consistency and accuracy. This includes standardizing formats for names, addresses, and other critical data fields.
5. Schedule and perform regular backups of the database to prevent data loss in case of system failures or technical issues. Ensure backups are stored securely and are easily retrievable.
6. Monitor the performance of the database, looking for any slow queries or bottlenecks. Use indexing and query optimization techniques to enhance speed and efficiency.
7. Review and manage user access permissions regularly to ensure that staff have appropriate access levels based on their roles. Remove access for individuals who no longer need it.
8. Provide training sessions for staff members on how to effectively use the database system. This includes navigating the interface, entering data, and generating reports.
9. Create and distribute regular reports to stakeholders, summarizing key metrics and insights derived from the database. Use these reports to inform decision-making and improve educational outcomes.
10. Ensure the database is effectively integrated with other relevant systems, such as learning management systems (LMS) and student information systems (SIS), for seamless data flow.
11. Adhere to data privacy regulations and best practices to protect sensitive information. Implement security measures, such as encryption and regular security assessments.
12. Gather feedback from users regarding the database's functionality and any challenges they face. Use this information to drive improvements and enhancements to the system.
13. Keep up to date with the latest trends and advancements in educational database management systems. Consider adopting new technologies or features that can improve efficiency and effectiveness.
14. Maintain detailed documentation of any changes made to the database, as well as standard operating procedures for database management. This ensures consistency and aids in training new staff.
15. Periodically evaluate the database system's performance and assess whether it meets the evolving needs of the educational institution. Plan for upgrades or migrations as necessary.

Task | Uploading and Managing NJCCIS Certificates for Compliance

Description of the Task: Uploading and managing NJCCIS (New Jersey Child Care Information System) certificates to meet state licensing requirements. This involves regular compliance checks, organization of certificates, and prompt updates. Maintaining accurate NJCCIS records is crucial for demonstrating accountability in early childhood education settings, fostering trust with families and regulatory bodies.

1. Begin by opening the NJCCIS website (njccis.com). Enter your credentials to log in to your account, ensuring you have the appropriate permissions to manage certificates.
2. Once logged in, navigate to the "Account" section located in the main menu. Click on "Profile" to access your personal information and professional credentials.
3. In your profile, locate and click on "Professional Profile." Within this section, select "Professional Development & Certifications" to manage your training records.
4. Click on "Add Professional Development" to initiate the process of entering new certifications. This will allow you to document your completed training programs.
5. Choose the appropriate "Core Knowledge" area relevant to your training. Ensure that you select the correct category that aligns with the educational standards set by NJCCIS.
6. Enter all required information accurately, including the date of completion, training provider, and any other pertinent details that reflect the essence of the professional development undertaken.
7. To add the certificate, click on the "Browse" button. This will open a file dialog where you can select the digital copy of your certificate from your computer. Ensure the file is in an acceptable format (e.g., PDF, JPEG).
8. After selecting the certificate, write a concise description of the course title and any relevant details that reflect the nature of the training. This helps provide context for the certificate.
9. Once all information is entered, click "Save" to finalize the addition of the professional development entry and associated certificate. Ensure that the system confirms the successful upload.
10. After saving, review the list of uploaded certificates to ensure accuracy and completeness. Confirm that the correct details are displayed alongside each entry.
11. Schedule periodic reviews of uploaded certificates to ensure that all staff members maintain current and valid certifications in compliance with NJCCIS guidelines.
12. Keep a record of any challenges faced during the upload process or feedback received about the NJCCIS system. This documentation can help in addressing future issues or suggesting improvements.
13. Ensure that you maintain a backup of all uploaded certificates and relevant training documentation in a secure location, such as a cloud storage service or a dedicated compliance folder on your computer.

Task | Reviewing and Approving Weekly Lesson Plans

Description of the Task: Evaluating and approving weekly lesson plans submitted by educators to ensure alignment with curriculum standards. Provide constructive feedback to foster a collaborative environment focused on continuous improvement. By ensuring lesson plans are well-structured and inclusive, you enhance instructional quality and promote effective teaching strategies.

1. Start by visiting the Cor Advantage website (my.coradvantage.com) and enter your login credentials to access your account. Ensure you have the necessary permissions to review lesson plans.
2. Once logged in, locate the "Lesson Planner" option in the navigation menu on the left side of the screen. Click on it to access the lesson planning tool.
3. Choose the appropriate center (e.g., Bloomfield or Colts Neck) from the available options. This will direct you to the lesson plans associated with that specific location.
4. Within the selected center, examine each classroom's lesson plans. Look for any green "+" signs next to the classrooms. These indicators signify missing or unapproved lesson plans.
5. For each classroom that has a green "+" sign, note the classroom name, section, and the corresponding day/date of the lesson plan. Keep a detailed list to ensure no classroom is overlooked.
6. After reviewing the first center, repeat steps 2 to 5 for the other center. This ensures a comprehensive check across all locations, confirming that all lesson plans are uploaded and updated.
7. As you review, ensure that all lesson plans are current and reflect any required curriculum adjustments or educational standards. Cross-reference with previous week's plans if necessary.
8. Evaluate the content of the lesson plans for alignment with the center's educational objectives, developmental milestones, and best practices in pedagogy. Make notes on any discrepancies or areas for improvement.
9. If you identify any missing plans or inconsistencies, communicate with the respective teachers. Use clear and supportive language to address any issues, and encourage timely submissions.
10. After completing the reviews, compile the data from your findings. This should include a summary of classrooms with missing plans, any communication with teachers, and recommendations for adjustments.
11. Create a formal report outlining the results of your review. Include details such as the number of lesson plans approved, pending approvals, and any suggestions for enhancing the planning process.
12. Send the compiled report to the appropriate administrators or educational leaders for their review. Ensure it is clear, concise, and includes actionable insights.



FINNANCE

Task | Processing and Managing Tuition/Course Loans

Description of the Task: Coordinating with families, students, and financial institutions to facilitate tuition or course loans. It includes reviewing loan applications, ensuring timely disbursement, and maintaining accurate records of repayments. Effective loan management is crucial for both operational cash flow and providing accessible education opportunities to students.

1. Obtain the student's full name, contact details, and any preliminary financial information from the admissions or enrollment team.
2. Reach out to the student or family to explain the loan process. Confirm their interest in financing options, and clarify key details about tuition or course loan terms, repayment schedules, and any associated costs.
3. During the conversation, gather essential personal details such as date of birth, address, and employment information, if applicable, to assess loan eligibility.
4. Open the institution's approved loan management platform or external financial partner website. Ensure that you have the necessary permissions to access and submit applications on behalf of students.
5. Enter all the required fields in the loan application form, including personal details, program or course information, and any financial data. Ensure accuracy to avoid delays in processing.
6. Ask the student to provide their preferred payment method, whether through credit card, debit card, or direct bank transfer. Ensure compliance with institution or loan provider policies on acceptable payment methods.
7. Request two references from the student (typically family members or close contacts), and collect only their names and phone numbers for verification purposes.
8. Once the loan application process is underway, proceed with the student's enrollment in their chosen educational program or course. Ensure their enrollment is reflected in the institution's database.
9. Double-check all entered information for accuracy and completeness. Ensure that the details align with institutional guidelines and the financial institution's criteria.
10. Finalize and submit the loan application to the institution's finance department or directly to the loan provider for review and approval.
11. Follow up with the loan provider and the student on the application status. Provide updates to both parties on any additional documentation required or on approval timelines.
12. Ensure that all loan application documents are stored securely within the institution's records management system for future reference and compliance audits.
13. Maintain regular communication with the student regarding loan approval, disbursement dates, and any necessary follow-up actions to ensure the student's financial obligations are met smoothly.

Task | Handling Bookkeeping for Educational Facility Operations

Description of the Task: Maintaining accurate financial records, tracking income and expenses, and preparing reports for budgeting and audits. It ensures transparency in financial transactions, from tuition payments to operational costs like utilities and staff salaries, which is vital for the smooth operation of the educational institution.

1. Develop a comprehensive chart of accounts that reflects the specific needs of an educational institution, including tuition fees, scholarships, donations, faculty salaries, educational supplies, maintenance, utilities, and administrative costs.
2. Gather all necessary financial records, such as tuition payment receipts, grants, vendor invoices, payroll data, and bank statements. Organize them by category for easy access and tracking.
3. Enter tuition fees, grant disbursements, and any additional revenue (such as program fees or donations) into the institution's accounting system. Ensure that each student's payment status is updated and outstanding balances are tracked.
4. Enter all operating expenses into the system, including salaries, benefits, utilities, facility maintenance, and instructional supplies. Assign expenses to appropriate categories for accurate financial reporting and analysis.
5. Calculate payroll for faculty, administrative staff, and support personnel. Ensure taxes, benefits, and other deductions are processed accurately. Record payroll as part of the overall budget.
6. Match bank statements with the institution's internal financial records to verify accuracy. Address any discrepancies immediately to ensure all transactions align correctly with financial documentation.
7. Track outstanding tuition payments and other receivables. Send reminders to families with overdue balances and maintain communication to ensure timely collection of fees.
8. Process payments to vendors and service providers. Ensure all bills for utilities, educational materials, and external services are paid on time and recorded accurately in the accounting system.
9. Prepare monthly and quarterly financial reports, including balance sheets, income statements, and cash flow analyses, to provide leadership with insights into the institution's financial health and performance.
10. Develop and maintain budgets based on historical financial data. Monitor budget adherence throughout the fiscal year, and adjust projections as needed based on changing financial conditions or operational requirements.
11. Stay updated on education-specific accounting standards and regulations. Ensure that all financial practices comply with government regulations, grant conditions, and any other legal requirements.
12. Conduct regular internal audits to verify the accuracy and integrity of financial records. Prepare for external audits as required, ensuring transparency and accuracy in all financial practices.

Task | Managing Accounts Payable for Vendors and Service Providers

Description of the Task: Processing and recording payments to vendors and service providers, ensuring timely settlement of invoices, and maintaining accurate accounts payable records. Efficient management of accounts payable ensures that educational institutions maintain strong relationships with suppliers, avoid late fees, and keep their operations running smoothly.

1. Gather invoices from educational service providers, such as curriculum developers, technology suppliers, textbook distributors, maintenance contractors, and utility companies. Also include costs for extracurricular services like transportation, cafeteria supplies, and sports equipment.
2. Review each invoice to ensure it matches purchase orders, contracts, or service agreements. Confirm that the amounts, dates, and descriptions of services (e.g., classroom technology installations or educational materials) are correct and match any corresponding delivery receipts.
3. Using the institution's chart of accounts, assign the appropriate codes to each invoice. Separate invoices for operational costs (e.g., utilities, classroom supplies), instructional costs (e.g., curriculum materials, teacher training), and administrative expenses (e.g., facility maintenance or office supplies).
4. Input invoice details into the institution's accounting software, such as QuickBooks or Sage, ensuring all relevant information is captured accurately, including vendor names, invoice numbers, amounts, and due dates.
5. Organize invoices based on their due dates. Schedule payments accordingly to avoid late fees, while also considering early payment discounts offered by suppliers (e.g., discounts on bulk purchases of textbooks or classroom furniture).
6. Batch invoices by payment dates and methods, aligning with the school's cash flow strategy. For example, group utility bills, facility maintenance costs, and instructional resource payments that are due in the same week.
7. Generate detailed reports that summarize all pending payments for review by the finance or administration team. Include the total amounts due, categorized by vendor (e.g., IT services, janitorial services, academic publishers).
8. Once approved, process payments using the institution's preferred method, such as electronic funds transfer (EFT) for vendors like software providers or checks for smaller, local service providers (e.g., transportation services or local school suppliers).
9. After payments are executed, update the accounting software to mark invoices as paid. Ensure that each vendor account reflects the payment to maintain accurate records of all transactions.
10. Regularly reconcile the accounts payable ledger with the general ledger to ensure all transactions are accurately recorded. Resolve any discrepancies between payments recorded in the system and actual payments made.
11. Review the accounts payable aging report regularly to monitor any outstanding invoices. Follow up with vendors on overdue payments to avoid service disruptions (e.g., delayed deliveries of classroom materials or technology).
12. At the end of each month, create a summary of all payments made, outstanding invoices, and any issues that arose during the payment process. Use these reports to assess cash flow and ensure the institution is meeting its financial obligations.

Task | Calculating and Reporting Monthly Cost Per Acquisition for New Enrollments

Description of the Task: Analyzing the marketing and enrollment expenses to determine the cost per acquisition (CPA) for each new student enrolled. Tracking and reporting these costs are essential for assessing the effectiveness of recruitment strategies and optimizing the budget for student acquisition, ensuring that resources are used efficiently in growing the institution.

1. Collect all relevant data sources, including advertising platforms, CRM systems, and any internal databases used for tracking student inquiries and enrollments.
2. Ensure the data from each source is accurate and up-to-date. Check for any discrepancies or missing data points that need to be addressed before proceeding.
3. Aggregate the data from all sources into a central repository, such as a spreadsheet or database. This includes metrics like ad spend, clicks, impressions, leads, and enrollments.
4. Organize the data by individual marketing campaigns to allow for detailed analysis of each campaign's performance.
5. Sum the total ad spend for the month across all campaigns and platforms.
6. Calculate the total number of leads generated from all campaigns during the month.
7. Identify the total number of enrollments (successful acquisitions) resulting from the leads generated within the month.
8. Divide the total ad spend by the total number of leads to determine the CPL (Cost per Lead) for each campaign and for the overall marketing efforts.
9. Divide the total ad spend by the total number of enrollments to determine the CPA (Cost per Acquisition) for each campaign and for the overall marketing efforts.
10. Compare the CPA and CPL for each campaign to identify which campaigns were most cost-effective and which ones underperformed.
11. Look for trends and patterns in the data, such as seasonal fluctuations, successful keywords, or high-performing ad creatives.
12. Write a summary report highlighting key findings, including total ad spend, total leads, total enrollments, CPL, and CPA. Include insights on campaign performance and recommendations for future strategies.
13. Present the summary report and visual reports to relevant stakeholders, such as the marketing team, finance team, and management, for review and feedback.



HR & RECRUITMENT

Task | Developing and Managing Onboarding Websites for New Educational Staff

Description of the Task: Creating and maintaining an accessible online platform that guides new hires through the orientation process. This site typically includes key resources like training materials, HR policies, school culture insights, and compliance requirements. It streamlines the onboarding experience, ensuring educators are well-equipped to begin their roles and ensure compliance with the institution's protocols.

1. Log in to the institution's internal onboarding website or platform designed for new hires. Navigate through all sections to familiarize yourself with the layout, structure, and navigation.
2. Assess the design, font choices, and overall user experience. Ensure the layout is visually appealing, easy to navigate, and mobile-friendly, providing a seamless experience for new staff across devices.
3. Go to the employment forms section and test each document by filling it out and submitting. Confirm that the forms are accessible, properly formatted, and free of submission errors. Ensure automated workflows are triggered correctly after submission.
4. Review the orientation module to ensure it covers all necessary content, such as institutional policies, core values, and compliance requirements. Test the quizzes or assessments to confirm they are properly aligned with the provided learning materials, and all questions can be answered without confusion.
5. Go through the online training or professional development sections. Make sure that all training videos, articles, and interactive elements are functioning properly. Ensure the assessments or completion certifications are automatically updated and recorded in the institution's staff management system.
6. Navigate to the job description section and verify that each link directs users to the correct role description. Ensure that the descriptions accurately reflect each position and include updated responsibilities, qualifications, and expectations.
7. Review all multimedia content, including videos, infographics, and downloadable materials. Confirm that each element is working properly, loading quickly, and providing relevant, high-quality information to support new staff in understanding their roles and expectations.
8. Ensure the onboarding website is integrated with HR tools such as payroll, benefits, and compliance tracking. Check if submitted information from forms, training completions, and certifications are correctly recorded in the institution's HR system.
9. Ensure that automated emails and notifications are functioning correctly. New hires should receive timely updates and reminders about upcoming training, compliance deadlines, and important onboarding steps.
10. Incorporate a feedback form or survey for new staff to report on their onboarding experience. Use this data to identify areas for improvement and make adjustments to the website based on user input.
11. Document all encountered issues such as broken links, content gaps, and design problems. Provide recommendations for improvements or technical fixes. Submit the report to the web development or HR team for review and action.
12. Schedule regular audits of the onboarding site to ensure all information is up-to-date, especially when institutional policies or compliance requirements change. Incorporate any feedback or suggestions from HR or new staff to continuously improve the onboarding experience.