

Inquiry Follow-Up Checklist

Every step from first contact to enrollment decision, so no interested family slips through.

FAMILY & INQUIRY

Family name

Date of inquiry

Child name(s) & grade

Source (referral / web / event)

Contact (phone / email)

FOLLOW-UP STEPS

Check off each step and record the date it was completed.

- ☐ Same-day acknowledgment sent
Thank the family and confirm what happens next
- ☐ Introductory call completed
Understand needs, grade, timeline
- ☐ School tour or open house scheduled
- ☐ Tour / visit completed
- ☐ Application link and fee schedule shared
- ☐ Application received
- ☐ Follow-up #1 sent
If no application within 3 days
- ☐ Follow-up #2 sent
If no application within 7 days
- ☐ Enrollment decision communicated
- ☐ Added to CRM / waitlist as appropriate

OUTCOME

Status (enrolled / pending / declined)

Next action & date

Notes