

THE DECISION SYSTEM — FROM TOUR ATTENDEE TO ENROLLED FAMILY

The Decision Phase is the moment everything else has been building toward. A parent who has engaged with your centre, attended a tour, and considered their options is now ready — or almost ready — to commit. The goal of this phase is to make saying yes as easy, clear and reassuring as possible, and to remove every barrier between a parent's intention to enrol and the completed enrolment form. Enrolment automation, CCS reminders and onboarding all run inside **HubSpot**.



SECTION A • OBJECTION HANDLING — ADDRESSING THE FINAL BARRIERS TO YES

A1 The Five Core Objections at the Decision Stage

Most parents who tour and don't immediately enrol are not choosing a competitor — they are stuck on one or two unresolved concerns. Address them proactively, before a parent walks away.

Objection	What They're Really Asking	How to Address It
Cost / Affordability	"Can we actually afford this?"	Provide a personalised CCS calculation with actual figures, not ranges. A worked example removes the fear of the unknown. Offer a 10-minute "Fee Estimate Call" with the Director.
Separation Anxiety	"Will my child be okay without me?"	Normalise it. Describe your settling-in process: gradual visits, short stays building to full days, daily app updates, open-door policy. Share real stories (with permission).
Timing / Not Ready	"Maybe in 6 months..."	Validate the concern, create gentle urgency: secure the place now with a flexible start date; note real waitlist timeframes. Offer a no-obligation waitlist position.
Trust / Safety	"Will my child be safe and cared for?"	Share ACECQA accreditation, NQS rating, ratios, first-aid certifications and policies. Offer a second, no-agenda visit — more time in the centre builds trust.
Still Comparing	"I have tours at two other centres."	Don't disparage competitors. Provide a Centre Comparison Checklist that subtly highlights your strengths. A personal Director email 3 days post-tour is the decisive human touch.
Family Disagreement	"My partner hasn't seen it yet."	Invite the partner/family for a second visit. A second touchpoint removes this objection and often accelerates the decision.

A2 The Director Follow-Up Call — The Highest-Converting Decision Tactic

No automated email can replicate a genuine 5–10 minute call from the Director within 48 hours of a tour. It demonstrates the personal attention the family will receive and creates a real-time chance to resolve concerns.

CALL — SETUP & SCRIPT FRAMEWORK

- ▶ Timing: within 48 hours of the tour, ideally the next morning
- ▶ Trigger: when the HubSpot meeting is marked Completed, the contact is set to “Tour Attended” and the Director gets a notification with the parent’s name, phone, child’s age and tour notes
- ▶ Opening: “Hi [Parent], it’s [Director] from [Centre] — I wanted to personally reach out after your visit.”
- ▶ Listen first — the parent reveals their objection within 60 seconds if given space
- ▶ Close: “Whenever you’re ready, our enrolment process is very straightforward — is there anything I can do to help you feel comfortable?”

CALL OUTCOME TRACKING IN HUBSPOT

- ▶ After every call, set the “Call Outcome” property: Interested / Not Ready / Enrolled / Not Proceeding
- ▶ Set “Call Completed” to distinguish from parents not yet called
- ▶ Outcome “Not Ready” → add to “Future Interest” list → monthly nurture workflow
- ▶ Outcome “Interested” → add to “High Intent” list → Vacancy Alert within 24 hours
- ▶ Outcome “Enrolled” → set lifecycle to Customer → Welcome Onboarding workflow (Section E)
- ▶ No answer after 2 attempts → send a personal email with the Director’s direct line

SECTION B · ENROLMENT PROCESS & FORMS — MAKING YES FRICTIONLESS

B1 Online Enrolment Form — Setup & Configuration

The enrolment form is the final conversion point. It must be professionally designed, mobile-optimised, logically sequenced, and communicate trust — because the parent is placing their child in your care.

RECOMMENDED FORM PLATFORMS

- ▶ Option 1 — Native CCMS form (Xplor, KindyNow, etc.): keeps all data in one system
- ▶ Option 2 — HubSpot Forms: native to your CRM, every submission lands on the contact record and can trigger workflows automatically
- ▶ Option 3 — Gravity Forms (WordPress): highly customisable, conditional logic, file uploads, e-signature, with a native HubSpot integration
- ▶ Option 4 — Jotform: drag-and-drop, childcare templates, embeds cleanly and syncs to HubSpot
- ▶ Whichever platform, host the form at /enrol/ on your own domain for trust and SEO

ENROLMENT FORM FIELDS

- ▶ Child Details: legal name, DOB, address, Medicare, immunisation status, allergies, dietary needs
- ▶ Parent/Guardian: primary + secondary contacts, employer, emergency contacts (min 2), authorised pickup list
- ▶ Care Requirements: preferred start date, days (AM/PM), room preference, full/part-time
- ▶ CCS Information: primary parent CRN, DOB for matching, partner CRN, family income estimate
- ▶ Health & Wellbeing: GP, specialists, developmental concerns, NDIS plan if applicable
- ▶ Consents: photography/social, excursion, emergency medical, sunscreen, fee agreement, policies

B2 Enrolment Form Conversion Optimisation — Reducing Drop-Off

Form abandonment at the enrolment stage usually means the form is too long, confusing, or demands information the parent doesn’t have to hand. The strategies below reduce abandonment.

FORM STRUCTURE

- ▶ Divide into 4–6 labelled sections with a progress indicator (“Step 2 of 5”)
- ▶ Allow “Save and Continue Later” — start on a phone, finish on desktop
- ▶ Mark mandatory vs optional clearly — don’t over-require at enquiry stage
- ▶ Use conditional logic to skip irrelevant sections
- ▶ Pre-fill name/email/phone from the earlier HubSpot form via known-contact tokens
- ▶ Mobile-test on iOS and Android — 70%+ complete on mobile

TRUST SIGNALS

- ▶ NQS badge + ACECQA approval number at the top of the page
- ▶ Brief Director message: “Completing this takes ~15 minutes. All information is held securely under the Privacy Act 1988.”
- ▶ Privacy policy link and SSL badge near the submit button
- ▶ Show an estimated completion time prominently
- ▶ Show a “What happens next” section below the form
- ▶ Make the Director’s direct contact visible

POST-SUBMISSION (HUBSPOT WORKFLOW)

- ▶ Submission enrolls the contact in a workflow: set lifecycle to Customer/“Enrolled”, remove from Considering / Tour Attended / Not-Yet-Booked lists
- ▶ Set “Start Date” and “Room” properties from the form data
- ▶ Copy enrolment data to a master Google Sheet (native HubSpot–Sheets action)
- ▶ Send the Director an instant internal notification with the key details
- ▶ The “Enrolled” status triggers the Welcome Onboarding workflow (Section E) automatically

ENROLMENT CONFIRMATION EMAIL

- ▶ Automated HubSpot email triggers immediately on “Enrolled”
- ▶ Subject: “Welcome to the [Centre Name] Family — Your Enrolment is Confirmed”
- ▶ Personalised with child’s name and start date; room placement; enrolment pack PDF attached
- ▶ CTA: “Complete Your Documentation Checklist”
- ▶ Secondary CTA: “Join Our Parent Community Facebook Group”

ENROLMENT PACK — WHAT TO PREPARE

- ▶ Branded PDF: welcome letter, philosophy & routine, term-date calendar, app setup, first-day checklist, labelling guide, fee/payment setup, CCS setup guide
- ▶ Keep to 8–10 pages — avoid overwhelming the family
- ▶ Provide as a single PDF download
- ▶ Refresh at the start of each calendar year

OUTSTANDING DOCUMENTS CHECKLIST

- ▶ Most enrolments are incomplete at submission
- ▶ Track status in a shared Google Sheet (Received / Pending / Overdue)
- ▶ Automated HubSpot reminder if a required property is blank 7 days before start
- ▶ Required before Day 1: Immunisation History (myGov AIR), full enrolment form, signed fee agreement, CCS confirmation, verified emergency contacts

SECTION C • CCS APPLICATION SUPPORT — REMOVING THE SUBSIDY BARRIER

Why CCS Support Is a Decision-Phase Marketing Function

CCS is the single largest financial factor in a family’s childcare decision — and one of the most misunderstood. Many families who can comfortably afford your centre after CCS believe they cannot. Guiding parents through the application removes the most common financial objection and accelerates the decision to enrol. The centre claims CCS on the family’s behalf; families pay only the “gap fee”.

STEP-BY-STEP CCS GUIDE FOR PARENTS

- ▶ Step 1 — Create/log in to myGov; both parents need a myGov account linked to their Centrelink CRN
- ▶ Step 2 — Link Centrelink to myGov (Services → Add Service → Centrelink)
- ▶ Step 3 — Apply for CCS via the Centrelink portal; complete income confirmation and provide the child’s CRN
- ▶ Step 4 — Provide the centre’s Provider ID and Service ID (supplied on the enrolment confirmation email)
- ▶ Step 5 — Centrelink processes in ~5–10 business days; CCS applies from the first day of care once confirmed
- ▶ Step 6 — Complete annual income confirmation each financial year to avoid interruption

CCS SUPPORT MATERIALS TO PROVIDE

- ▶ A plain-language “CCS Setup Guide” PDF with myGov screenshots in the enrolment pack
- ▶ A dedicated “Fees & Subsidy” page with the CCS estimator linked
- ▶ Offer a 15-minute “CCS Setup Call” via the HubSpot Meeting Scheduler
- ▶ Post a “How to Apply for CCS in [Year]” explainer video (decision resource + SEO/social asset)
- ▶ A “Before CCS vs After CCS” fee comparison at several income levels
- ▶ Train admin staff to answer basic CCS questions confidently

C2 CCS Automation — HubSpot Reminders for Pending Applications

Many families submit the enrolment form without starting their CCS application. This HubSpot workflow ensures no family starts care without CCS in place — protecting both the family’s finances and the centre’s revenue.

Trigger	Timing	Email Purpose & Content
“Enrolled”, CCS CRN property empty	Immediately	CCS Setup Prompt — CCS begins from the first day of care, so apply now. Link to the CCS Setup Guide; offer a 15-minute CCS setup call via the HubSpot Meeting Scheduler.
CCS CRN still empty	7 days after	CCS Reminder — simple myGov step-by-step. “Without CCS you’ll pay the full daily rate — the subsidy applies from Day 1 once approved.”
Start date 14 days away, CRN empty	14 days before start	Urgent CCS Alert — processing takes 5–10 business days, so apply now. The workflow also notifies the Director and admin staff that this family hasn’t provided a CRN.
CCS CRN populated	On update	CCS Confirmation — CCS is linked and starts from the start date; confirm the gap-fee amount and link to payment setup.

SECTION D • WAITLIST MANAGEMENT — TURNING WAITING INTO COMMITMENT

D1 Waitlist Strategy — Building the Pipeline for Future Enrolments

Families on a waitlist have already made an emotional decision — they want your centre. The challenge is to maintain that commitment so they don't defect to competitors while waiting.

WAITLIST FORM & REGISTRATION

- ▶ Dedicated /waitlist/ form, separate from the enrolment form
- ▶ Fields: parent name/email, child name/DOB, preferred start (month/year), preferred days, room, "How did you hear about us?"
- ▶ Consider a \$50–\$100 non-refundable registration fee for heavily oversubscribed rooms
- ▶ Add each registrant to a room-specific HubSpot list (e.g. "Waitlist — Nursery")
- ▶ Maintain a Google Sheet register cross-referenced with the HubSpot list

KEEPING WAITLISTED FAMILIES ENGAGED

- ▶ Monthly HubSpot email to the waitlist segment: centre news, activities, educator spotlights
- ▶ Invitations to open days and community events
- ▶ Quarterly position update — honesty prevents silent defection
- ▶ Birthday email from the Director for waitlisted children
- ▶ Facebook Group invitation before they start
- ▶ Offer early-available places to waitlisted families first

D2 Vacancy Notification Automation — Filling Places Immediately

When a place opens, it must reach the right waitlist segment immediately. Every day a place sits unfilled is direct revenue lost.

VACANCY NOTIFICATION PROCESS

- ▶ Admin adds the "Vacancy Available — [Room]" trigger to the relevant waitlist list
- ▶ A HubSpot workflow instantly emails all families on that room's waitlist
- ▶ Subject: "A place has become available — [Room] — [Month/Year]"
- ▶ Include days available, start date, gap fee, and a HubSpot meeting link if a tour is still needed
- ▶ 48-hour window: places offered in registration-date order; move to the next family if no response

WAITLIST-TO-ENROLMENT

- ▶ On confirmation, a HubSpot workflow moves the contact from "Waitlist — [Room]" to "Enrolled" → triggers Welcome Onboarding
- ▶ Remove from the waitlist list immediately to prevent duplicate comms
- ▶ If the family declines: set "Waitlist — Declined — Future Interest" and a lower-frequency nurture
- ▶ Track monthly waitlist conversion rate — target 70%+
- ▶ Annual audit: remove aged-out or unengaged families

PRIORITY WAITLIST TIERS

- ▶ Tier 1 — Siblings of enrolled children (key retention/loyalty tool)
- ▶ Tier 2 — Previous enquirers & tour attendees (demonstrated intent)
- ▶ Tier 3 — Referrals from enrolled families (rewards the referrer)
- ▶ Tier 4 — Standard order by registration date
- ▶ Communicate the priority system transparently at registration

SECTION E • WELCOME & ONBOARDING SEQUENCE — HUBSPOT WORKFLOW

E1 Welcome Email Sequence — From Enrolled to First Day Ready

The onboarding sequence begins the moment a family's lifecycle stage is set to Customer/"Enrolled" in HubSpot. It reduces first-day anxiety, ensures admin requirements are completed before the start date, and begins the relationship that drives retention and referral.

Email	Timing	Key Content & CTA
Welcome Confirmation	On "Enrolled"	Personal welcome from the Director (child's name), enrolment details confirmed, enrolment pack PDF attached, outstanding-documents checklist. CTA: "Complete Your Documents Checklist".
Getting Ready Guide	Day 3	Labelling guide, what to pack, what not to bring, sleep-schedule adjustment tips. CTA: "Download the What to Bring Checklist".
Meet Your Room Team	Day 7	Photo and bio of each educator in the child's room, plus the room's daily routine. CTA: "Visit Our Educators Page".
Settling-In Explained	Day 14	The gradual settling-in process (1 hour → 2 hours → half day → full day), the Director's approach to separation, how/when to call. CTA: "Book Your Familiarisation Visit".
CCS Reminder (conditional)	Day 21	Only if the CCS CRN property is still empty — friendly reminder + setup call link. CTA: "Book a 15-Minute CCS Setup Call".
Week Before Start	7 days before start	Final what-to-bring checklist, parking/drop-off, who to ask for on Day 1, Director's direct contact. A pure warmth email.
First Day Follow-Up	End of first day	Warm note from the educator/Director with one specific detail about the child's day. CTA: "Ask Us Anything — reply to this email".

Email	Timing	Key Content & CTA
First Week Check-In	Day 5 after start	Genuine check-in; normalise that the first weeks can be emotional. CTA: "Share Your Feedback" (short form).

SECTION F • REFERRAL PROGRAM — ENROLLED FAMILIES BECOME YOUR ACQUISITION CHANNEL

F1 Building a Structured Referral Program

A referred lead from an enrolled family converts to enrolment at 3–5× the rate of a cold digital lead — and arrives pre-sold on your quality. A structured programme makes this word-of-mouth channel scalable.

PROGRAM DESIGN & INCENTIVES

- ▶ Credit \$50–\$100 off a week's gap fees per successful referral (referred family enrolls and completes 4 weeks)
- ▶ Two-sided reward: waive the referred family's admin fee — removes awkwardness
- ▶ Promote in the Week 4 and Month 3 onboarding emails (peak satisfaction)
- ▶ Reception referral cards with a QR code to the enquiry form, tagged "Referral Source"
- ▶ Track via a HubSpot "Referral Source — Name" property to attribute and thank correctly

REFERRAL AUTOMATION IN HUBSPOT

- ▶ Month 1 email: P.S. referral mention with the incentive
- ▶ Month 3 email: dedicated referral CTA
- ▶ Annual referral campaign at the January intake period
- ▶ Referral confirmation: when a referred family enquires and names the referrer, send an instant thank-you to the referrer
- ▶ All referred leads set to "Referral Lead" in HubSpot — tracked separately in monthly reporting for channel ROI

SECTION G • DECISION PHASE LAUNCH CHECKLIST

ENROLMENT PROCESS

- ▶ Enrolment form live at /enrol/ — tested on mobile and desktop
- ▶ End-to-end test: submit → HubSpot sets "Enrolled" → Director notified → Google Sheet updated
- ▶ Enrolment pack PDF created and attached to the confirmation email
- ▶ Outstanding-documents checklist linked from the confirmation
- ▶ Trust signals in place; "Save and Continue Later" tested

CCS, WAITLIST & OBJECTIONS

- ▶ CCS Setup Guide PDF created and in the enrolment pack
- ▶ CCS workflow tested: submit with empty CRN → 3-step reminder sequence fires
- ▶ Waitlist form live at /waitlist/, room-specific HubSpot lists created
- ▶ Director call script prepared; staff briefed on objection handling
- ▶ "Before vs After CCS" fee comparison prepared

ONBOARDING & REFERRAL

- ▶ Welcome onboarding HubSpot workflow activated — 8-email sequence tested
- ▶ First-day follow-up reminder process set for educators
- ▶ Referral program designed; mentions added to Month 1 and Month 3 emails
- ▶ Private Parent Facebook Group created; join link in onboarding
- ▶ GA4 enrolment-form conversion goal confirmed; source reporting dashboard set up

The Decision Phase closes the loop on every marketing dollar spent in Awareness, Engagement, and Consideration. A parent who chooses your centre becomes an advocate, a reviewer, a referrer, and a long-term member of your community. Every element of this phase — from a frictionless enrolment form to a warm first-day email, all orchestrated in **HubSpot** — is an investment in the lifetime value of that relationship.