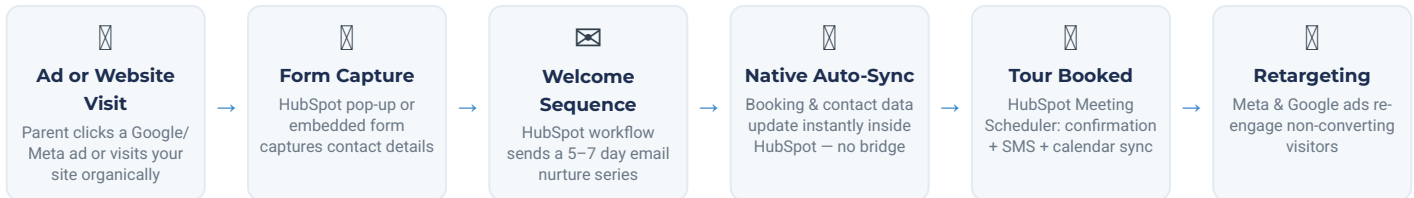


THE ENGAGEMENT SYSTEM — HOW HUBSPOT WORKS END-TO-END

Once a local parent sees your centre through Google, Facebook, or Instagram, the Engagement Phase converts that fleeting impression into a genuine interaction — a form submission, a tour booking, or a phone call. This phase is powered by **one integrated platform: HubSpot** — combining your CRM, email automation (Workflows), and the HubSpot Meeting Scheduler for tour bookings. Because everything lives in a single system, every step below works automatically — with no third-party connectors and no manual action from your team.



SECTION A • HUBSPOT CRM — SETUP, LISTS & FORMS

A1 HubSpot Account Configuration

Before building any forms or workflows, the HubSpot account must be correctly structured. All data flows from this single foundation.

ACCOUNT ESSENTIALS

- ▶ Create a HubSpot account at hubspot.com — the free CRM covers contacts, forms and meetings; add Marketing Hub Starter/Professional for advanced workflows and SMS
- ▶ Connect your email sending domain in Settings → Domains & URLs and authenticate DKIM/SPF — prevents emails landing in spam
- ▶ Connect your team inbox (Settings → Inbox) so every enquiry and reply is logged automatically on the contact record
- ▶ Set currency to AUD and time zone to AEST in Account Defaults
- ▶ Upload your centre logo and brand colours in Settings → Marketing → Branding so every email, form and booking page is on-brand

CONTACT DATA STRUCTURE

- ▶ Work from one HubSpot CRM database — every parent is a single contact record (no separate lists to keep in sync)
- ▶ Use the **Lifecycle Stage** property to track progress: Lead → Marketing Qualified → Opportunity (Tour Booked) → Customer (Enrolled)
- ▶ Create custom properties: Child's Age, Preferred Start Date, Suburb, How Did You Hear About Us, Lead Source
- ▶ Build **Active Lists** that update themselves: New Enquiry, Website Form, Lead Ad (Facebook), Tour Booked, Tour Attended, Enrolled
- ▶ Add a consent checkbox and subscription types to every form (required under the Australian Privacy Act 1988)

A2 CTA Strategy — Pop-Up & Embedded Forms on Your Website

Every page is an opportunity to capture a parent's details. Two form types work together: a timed pop-up that appears after 8–12 seconds, and embedded forms at strategic conversion points. Build both in Marketing → Lead Capture → Forms in HubSpot.

TRIGGER SETTINGS

- ▶ Display after 10 seconds on page
- ▶ Show on all pages (exclude Thank You & Tour Booking pages)
- ▶ Show once per visitor per 30 days
- ▶ Enable on desktop and mobile
- ▶ Exit-intent trigger as a secondary option

FORM FIELDS

- ▶ First Name (required)
- ▶ Email Address (required)
- ▶ Phone Number (optional — improves lead quality)
- ▶ Child's Age / Age Group (dropdown)
- ▶ Consent checkbox: "I agree to receive updates"
- ▶ Hidden field: Lead Source = "Website Pop-up"

DESIGN & COPY

- ▶ Headline: "Curious About Our Centre?"
- ▶ Sub-copy: "2-minute read on our philosophy, fees, and how to book a free tour."
- ▶ CTA button: "Send Me the Details" (lower friction)
- ▶ Match brand colours and font; logo in header
- ▶ Success message: "Check your inbox — your welcome guide is on its way!"

PRIORITY PLACEMENT — EMBEDDED FORMS

- ▶ Homepage — below the hero: “Book a Free Tour or Ask a Question”
- ▶ Fees & Subsidy page — below the CCS calculator
- ▶ Programs & Philosophy page — end of page
- ▶ Contact page — primary method alongside phone
- ▶ Blog posts — inline mid-article and end-of-article
- ▶ WordPress sidebar widget — site-wide

EMBEDDED FORM CONFIGURATION

- ▶ Use HubSpot’s form embed code (Forms → Share → Embed)
- ▶ Install the official **HubSpot for WordPress** plugin for clean rendering and full page tracking
- ▶ Style forms to match your theme
- ▶ Set Lead Source = “Website Embedded Form” to distinguish from pop-up and ad leads
- ▶ Redirect to a custom Thank You page (/thank-you/) to fire GA4 + Meta Pixel conversions
- ▶ A/B test a short 2-field form vs the full 4-field form for 30 days

SECTION B • HUBSPOT WORKFLOWS — WELCOME SEQUENCE & NURTURE EMAILS

B1 Welcome Email Sequence — 5 to 7 Touch Points Over 7 Days

Go to Automation → Workflows → Create workflow. Choose a contact-based workflow with the enrolment trigger “Form submission” (or “Contact created”). This sequence runs automatically for every new parent — no manual action required.

#	Send Timing	Email Purpose	Key Content & CTA
Email 1	Immediately	Warm Welcome + Philosophy	Personal welcome from the Director, 3 key points of your educational philosophy, 3 high-quality interior photos. CTA: “Book a Free Tour” → your HubSpot meeting link.
Email 2	Day 2	Meet Our Educators	2–3 educator spotlights with photo, qualifications and a one-line teaching philosophy. Parents choose people, not buildings. CTA: “See Our Full Team”.
Email 3	Day 3	A Day in the Life	Hour-by-hour daily schedule (arrival, play, group time, lunch, rest). Answers the most common question before it’s asked. CTA: “Book a Tour” → HubSpot meeting link.
Email 4	Day 5	Fees, CCS & Subsidy	Clear fee table by room/age group, plain-language CCS explanation (up to 90% for eligible families), link to the CCS calculator. CTA: “Get a Personalised Fee Estimate”.
Email 5	Day 6	Parent Testimonials + Reviews	3–4 parent testimonials, a Google review screenshot, NQS rating / ACECQA badge. CTA: “Read More Reviews” → Google Business Profile.
Email 6	Day 7	Vacancy Alert + Tour Invitation	Specific vacancy availability by age group (creates real urgency). CTA: “Book a Free Tour” → HubSpot meeting link. Secondary: click-to-call.
Email 7	Day 10	Re-engagement (if no tour booked)	Send condition: only if the contact is NOT a member of the “Tour Booked” list. Soft re-engagement; offer to answer questions; lower-friction “Download Our Centre Brochure”.

B2 Additional HubSpot Workflows — Beyond the Welcome Sequence

Each workflow below enrolls and unenrolls contacts automatically based on properties and list membership — all native to HubSpot.

TOUR BOOKED WORKFLOW

- ▶ Trigger: contact books via the HubSpot meeting link
- ▶ Email 1 (now): "Your Tour is Confirmed" — date, time, address, parking
- ▶ Email 2 (2 days before): what to expect + prompt to prepare questions
- ▶ Email 3 (morning of): final reminder + Director's direct number
- ▶ Email 4 (1 day after): post-tour follow-up + enrolment enquiry link

TOUR NO-SHOW WORKFLOW

- ▶ Trigger: meeting outcome set to "No-show"
- ▶ Email 1 (same day): "We missed you — would you like to reschedule?"
- ▶ Email 2 (3 days later): re-book CTA with new available dates
- ▶ Email 3 (7 days later): soft final follow-up
- ▶ After 14 days no response: move to "Dormant — Re-engage in 60 Days" list

LONG-TERM NURTURE

- ▶ Trigger: contact added to "Not Yet Ready — Future Interest" list
- ▶ Monthly: seasonal content (term highlights, activity photos, staff news)
- ▶ Quarterly: vacancy update for the upcoming term/year
- ▶ Annual: "Is now the right time for [Centre Name]?"
- ▶ If engagement hits zero after 6 months → move to "Inactive — Archive"

REVIEW REQUEST WORKFLOW

- ▶ Trigger: property "Tour Attended" = true (set on meeting completion)
- ▶ Send after 30 days: 2-minute Google review request (direct link)
- ▶ Re-send at 90 days to non-responders
- ▶ If review left → set "Google Review Left" and suppress from future requests

ENROLMENT ANNIVERSARY

- ▶ Trigger: date-based on the "Date Enrolled" property (12 months)
- ▶ Content: "One year at [Centre Name] — a note from us"
- ▶ Gentle referral ask with a pre-tagged "Referral Lead" enquiry link

RE-ENGAGEMENT WORKFLOW

- ▶ Trigger: no email opened in 90 days (active list)
- ▶ Email 1: "Has anything changed? We'd love to know."
- ▶ Email 2 (14 days later): clear unsubscribe option offered
- ▶ If still no engagement: unsubscribe automatically to keep the database healthy

SECTION C • HUBSPOT MEETING SCHEDULER — TOUR BOOKING SYSTEM SETUP

C1 Setting Up the HubSpot Meeting Scheduler

The Meeting Scheduler is built into HubSpot — no separate plugin or licence required. It lets parents self-book tours 24/7 against your real calendar availability.

INITIAL CONFIGURATION

- ▶ Connect the Director's Google or Microsoft 365 calendar in Settings → Meetings
- ▶ Set working hours: Mon–Fri 7:00am–6:00pm (add Saturdays if you offer weekend tours)
- ▶ Slot duration: 30 minutes · Minimum notice: 24 hours
- ▶ Booking window: 60 days · Buffer: 15 minutes between tours
- ▶ Set time zone to AEST

TOUR MEETING SETUP

- ▶ Create a meeting link: "Centre Tour — [Centre Name]"
- ▶ Location: "At the centre — [address]"
- ▶ Description: a personal guided tour with [Director Name] — complimentary and commitment-free
- ▶ Custom booking questions: Parent Name, Child's Name, Child's Age, Preferred Start Date, How Did You Hear About Us
- ▶ Assign to the Centre Director (use round-robin if multiple staff give tours)
- ▶ Brand the booking page with your logo and colours

C2 Embedding the Booking System & Automated Notifications

BOOKING PAGE SETUP (WORDPRESS)

- ▶ Create a dedicated page: /book-a-tour/
- ▶ Embed the HubSpot meeting scheduler embed code (Meetings → Share → Embed)
- ▶ Page title: "Book a Free Centre Tour"
- ▶ Add 2–3 sentences above the calendar: what to expect, duration, who they'll meet
- ▶ Use this URL as the destination for every "Book a Tour" CTA across the site, emails and ads

AUTOMATED CONFIRMATIONS & REMINDERS

- ▶ Confirmation email auto-sends on booking (date, time, address, parking, what to bring)
- ▶ Automated reminders 48 hours and 2 hours before
- ▶ Director receives an instant notification and the tour appears in their calendar
- ▶ Post-tour "thank you" email 1 hour after, sent by a workflow
- ▶ Add SMS reminders via HubSpot SMS (Marketing Hub) or a connected SMS app to cut no-shows

C3 Calendar Sync — No More Double-Bookings

SETUP

- ▶ Two-way Google/Microsoft sync: if the Director blocks time, that slot disappears from the booking page automatically
- ▶ New bookings appear instantly in the team calendar
- ▶ Create a dedicated "[Centre Name] Tours" calendar for clarity
- ▶ Test: create a dummy booking and confirm it appears within 60 seconds

DIRECTOR BEST PRACTICES

- ▶ Block recurring "no tour" times (meetings, lunch, admin) — the scheduler respects them
- ▶ Enable calendar notifications as a backup to HubSpot's alert
- ▶ Keep a 15-minute buffer so the Director can move between rooms and prepare
- ▶ Share the tour calendar with front-desk staff so everyone sees incoming visitors

SECTION D • NATIVE AUTOMATION — IT ALL CONNECTS, NO BRIDGE NEEDED

Why there's no "automation bridge" any more

Previously, a separate third-party connector was needed to pass data between the email tool and the booking tool. With HubSpot that's gone: the CRM, Workflows, forms and Meeting Scheduler are **one platform**, so data moves instantly and natively. The four rules below are simple, reliable workflow rules built right inside HubSpot.

HubSpot Workflow	What It Does (automatically, inside HubSpot)
Tour Booked → Update & Trigger	When a parent books via the "Centre Tour" meeting link, HubSpot sets Lifecycle Stage = Opportunity, adds them to the "Tour Booked" list, stamps the Tour Date property, enrolls them in the Tour Booked email workflow, and removes them from the New Enquiry nurture.
Tour Completed → Post-Tour	When the meeting outcome is marked "Completed", HubSpot sets "Tour Attended" + date, enrolls the contact in the post-tour sequence, and removes them from the "Tour Booked" list.
Cancelled / No-Show → Re-engage	When the outcome is "Cancelled" or "No-show", HubSpot updates Tour Status and enrolls the contact in the re-booking workflow.
New Enquiry → Director Task	If a contact submits a form but hasn't booked within 48 hours, HubSpot creates a follow-up task for the Director and keeps them in the nurture — so no parent slips through the gap.

SECTION E • RETARGETING — RE-ENGAGING PARENTS WHO DIDN'T ENQUIRE

Not every parent who visits your website submits a form or books a tour on their first visit. Retargeting ads on Meta and Google keep your centre visible during the days and weeks they're still deciding.

META RETARGETING SETUP

- ▶ Ensure the Meta Pixel fires on all pages (via Google Tag Manager)
- ▶ Custom Audience: Website Visitors → All Pages → Last 30 Days
- ▶ Audience: visited /book-a-tour/ but not /thank-you/ (abandoned booking)
- ▶ Audience: visited /fees/ or /enrol/ — high-intent signal
- ▶ Single-image ad: "Still looking for childcare in [Suburb]? We'd love to show you around."
- ▶ Exclude your HubSpot "Tour Booked" and "Enrolled" lists — sync them to Meta as an exclusion audience
- ▶ Budget: \$10–\$15/day · 30-day window

GOOGLE RETARGETING SETUP

- ▶ Google Ads tag installed site-wide via Google Tag Manager
- ▶ Remarketing audience: all website visitors (last 30 days)
- ▶ Segment: visited the booking page but not the confirmation page
- ▶ Display remarketing across the Google Display Network
- ▶ Search RLSA: lift keyword bids 30–50% when a past visitor searches childcare terms again
- ▶ Frequency cap: 7 impressions per user per week
- ▶ Budget: ~\$10/day across Display and RLSA

SECTION F • PRE-LAUNCH TESTING CHECKLIST

HUBSPOT CRM & FORMS

- ▶ Submit the pop-up form with a test email — confirm the contact appears with the right Lead Source and list membership
- ▶ Submit each embedded form — confirm “Website Embedded Form” source applied
- ▶ Manually enrol a test contact in the Welcome workflow — confirm all 7 emails send in order
- ▶ Check subject lines and preview text on mobile (Gmail + Apple Mail)
- ▶ Confirm unsubscribe and subscription-preference links work

MEETING SCHEDULER & WORKFLOWS

- ▶ Make a test booking via /book-a-tour/ — confirm confirmation email and SMS arrive
- ▶ Confirm the tour appears in the synced calendar within 2 minutes
- ▶ Confirm the Tour Booked workflow fires and list membership updates
- ▶ Cancel the test booking — confirm Tour Status property updates
- ▶ Test the 48-hour and 2-hour reminders; confirm the Director is notified

RETARGETING

- ▶ Use Meta Pixel Helper to verify the Pixel fires on all pages
- ▶ Use Google Tag Assistant to confirm the Google Ads tag
- ▶ Verify Custom Audiences are populating (allow 24–48 hours)
- ▶ Confirm conversion events fire (Lead, ViewContent)
- ▶ Confirm GA4 goals track form submissions and tour bookings
- ▶ Launch with a small test budget and confirm delivery

The complete engagement system — **HubSpot CRM, Workflows, and the HubSpot Meeting Scheduler** — runs 24 hours a day, 7 days a week, from one integrated platform, with no third-party connectors and no manual input from your team. Every new parent who enters your funnel receives a consistent, professional, and timely experience from first form submission through to confirmed tour booking. This is the foundation that turns digital marketing spend into actual enrolment conversations.