

Client Services Information Session



Housekeeping



1. Please keep your microphones muted during the presentation.
2. Ask any questions you have in the chat.
3. If you have any other questions, please reach out to your Client Service Coordinator.



Meet Your Team!

Your North American Client Services Team

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How Does Client Services Support?



Sales/Enrollment

- Identify potential family needs to provide tailored experience and communication
- Create and distribute sales materials and communication
- Identify opportunities along the sales funnel to improve E-V-E conversions
- Improve enrollment experience for both internal and external stakeholders

Client Relationship Management (CRM)

- Build and maintain positive relationships with families
- Reinforce positive interactions by tailoring communication with families at key points in the E-V-E journey
- Handle feedback and work with internal teams to improve effectiveness of process and drive further efficiencies

Enrollment Focus Programs

- Collaborate interdepartmentally to develop and execute enrollment campaigns/strategies
- Guide families through the enrollment journey (E-V-E)
- Support new family onboarding and transition
- Referral program management and support

Process Improvement

- Identify opportunities in the sales process and develop solutions
- Implementation of new sales processes and development of training materials
- Manage mystery shop program and work to support improvement initiatives

Communication and Branding

- Effectively communicate brand identity and unique selling points, ensure consistent and on brand messaging
- Provide support and training to our forward-facing teams

Data Management

- Maintain and update CRM records with accurate information.
- Report and analyze sales and enrollment data

Collaboration with Internal Teams

- Work closely with marketing, operations, and finance teams to align sales efforts with overall company goals
- Provide feedback and insights from customer interactions to drive process and program improvements
- Identify local or regional trends and work with operational teams to leverage opportunities

Center Director Portal Review



1. Purpose of the portal and how to use
2. Adding a new inquiry.
3. Scheduling a tour
4. Recording a tour outcome and initiating enrollment
5. Availability tracker and forecasting
6. Waitlist
7. Referral program
8. Best practices
9. Support and Resources



Best Practices

1. Use the **same email address that was used to schedule the tour**. To ensure accuracy, it's best to copy and paste the contact email from the tour information you were sent with the original booking.
2. Ensure we are **entering as much accurate information as possible** to assist with the enrollment process. I.e., correct email, phone number and date of birth.
3. The **email address is the unique identifier for a family**. If you have questions about a family, make sure to **include the family's email address** when reaching out to your Client Services Coordinator so we can find the correct information.
4. When adding the tour to your calendar **always check for any notes** that may indicate a Virtual tour has been requested by parent.
5. Following-up **within two days after a tour** shows each family how important they are. This action can make the difference between them enrolling with you or at another center.



Welcome to the BrightPath US Center Director Portal!

Please select from the buttons below to add a new inquiry to the system, schedule a tour or initiate enrollment.

Or go to your page:

[Arizona](#) [Kidz Ink](#) [Ohio & KY](#) [NY: IS/LAYG](#) [Malvern](#) [LEAP](#) [Alphabet](#)

BP Add a new inquiry

BP Schedule a tour

BP Waitlist Family

BP Enroll a New Family

Enter a tour outcome!

Select one of the following to record the outcome of a tour or the status of a family.
You can also update the status of a parent by resubmitting through another form.



Tour No Show - We will try and reschedule

Tour Undecided - We will follow up with family

Tour Waitlisted- unable to confirm start date. We will contact the family when space is available

Tour wants to enroll - Confirmed space, family will be sent DCW link

Tour Cancelled

Family Enrolled Before Tour

Adding a New Inquiry

If a family were to walk in or call the center requesting information you can record the inquiry. Once submitted the family will be added to our contacts and receive an automated email with information specific to the preferred center chosen. This family will then be entered into our nurturing follow-up workflow.

How to **add an inquiry**:

1. Click on the **Add a new inquiry** button to open the form.
2. Fill out the necessary information about the prospective family, including contact details and any specific requirements or notes and submit the form.

Note: The Inquiry form does **NOT** add the family to the waitlist or initiate enrollment.



Scheduling a Tour

How to **Schedule a tour:**



1. Select the **Schedule a tour** button to access the tour calendars.
2. Select the calendar that corresponds with your school and select the date, time and family information.
3. Once submitted, an email confirmation will be sent to the parent and to the center to add to your calendar.
4. You must add the tour to your center's calendar, this will ensure you will know the tour is scheduled and you can be prepared when the Family arrives. (Check the appointment for notes)
5. Use the scheduled tour information found on your calendar to add the tour outcome. **COPY/PASTE** the email address.

Note: The email address **Must** match the scheduled tour email address to convert the tour result.

Note: If you need to make any adjustments to your tour times and schedule please contact your Client Service Coordinator.

Recording Tour Outcomes

1. Enter tour outcomes **immediately** after the tour.
2. Record **all tour** outcomes including **walk-ins**.
3. Choose the **appropriate button based on the outcome** of the tour or the status of the family.



Recording Tour Outcomes



Tour No Show - We will try and reschedule

Button will trigger a follow-up email to reschedule the tour.

Tour Undecided - We will follow up with family

Button will trigger follow-up conversations to move the family closer to enrollment.

Tour Waitlisted- unable to confirm start date.

Button will add the family to the waitlist/cannot confirm space list. Select ONLY for families that cannot be guaranteed a start date, your center is at capacity, or need more staff to enroll more children.

Tour wants to enroll - Confirmed space, family will be sent DCW link

Select this to initiate the enrollment process. Ensure you have had a conversation with the family confirming their start date and schedule.

Tour Cancelled

Button will trigger a follow-up email to reschedule the tour.

Family Enrolled Before Tour

Select this if the Family has already enrolled before the tour.

Initiating Enrollment

How to Initiate Enrollment:

1. Select either **Enroll a New Family** button or the Tour Outcome **Tour wants to enroll - Confirmed space, family will be sent DCW link** to begin the enrollment process.
2. This is for **new enrolling families ONLY**.
3. Fill in the required information, and **include the confirmed schedule, start date, room number and subsidy information for billing**.
4. Once completed, submit the form to initiate the enrollment process.
5. The Family will be sent the DCW registration link along with fillable digital copies of the enrollment forms.

Note: After submitting the form, your center DCW link will also be shown to **allow you to enroll the family on the spot!**

Enroll A Sibling

Existing families will log onto the DCW parent portal

Select **Registration**

Scroll down and select **Online Enrollment**

Click on **Click to View Offerings**

They can proceed with the registration.

Notify your CSC so we can finalize the registration quickly with the billing department.

Enroll Onsite

Pop-up DCW Links

Once you submit the form a Pop-up will present you with your center's DCW registration link to **Enroll a Family Onsite!**



Congratulations on this ENROLLMENT 🎉! The family will be sent the link to set up their DCW account.

You can also start enrollment with the family onsite right now!

[CT DCW Links](#)

[Avon Registration](#)

[Berlin Registration](#)

[Cheshire Registration](#)

[East Hampton Registration](#)

[Ellington Registration](#)

[Farmington Registration](#)

[Glastonbury Registration](#)

Parent Registration Process Walkthrough



When the DCW link is selected from the popup or how to enroll email this is the registration landing page.

Registration

The * and ★ icons indicate mandatory fields that must be filled out.

Programs

Registration - Brightpath - OH at Union

Requested Admission Date

 ★

Input requested start date and schedule

Day Selection

Please select the days that your child will be attending.

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

Parent must check off all acknowledgment boxes to proceed.

Indicate type of care using drop down menu

Program Questions

A. Please indicate type of care

Part-Time

--

Full-Time

Part-Time

Occasional Care (School Age Care Only - Occasional Days Off)

Centre Transfer

C. An annual registration fee of \$125 per child is applied with each August's tuition. An annual summer camp fee of \$50 per child is applied to May's Tuition for Toddlers and Preschool. School age summer camp fees are determined by scheduled activities and will be outlined upon enrollment in this program. *

D. BrightPath Early Learning only accepts electronic monthly automatic payments. Tuition is billed monthly on the 25th of the month and withdrawn from the account of your choosing on the 28th. A late fee of \$75 will be assessed to any outstanding balance as of the 3rd of the month. If the balance is not resolved within 2 business days, enrollment will be suspended until resolved. If additional fees are incurred after tuition is collected, our billing department will process the remaining balance using your chosen payment method on file. *

E. All payments that are returned by the bank for insufficient funds will have an additional charge of \$35.00. *

F. 30 days' written notice is required for withdrawing your child from BrightPath Early Learning for any reason. If the required 30 days' is not given, parents will be charged for that period. If 30 days' notice is given, any additional tuition already paid over and above the 30 days will be refunded. *

Parent Registration DCW

Add Parent Referral and Select Payment Type



If the parent has been referred by another family, enter the referral information here. Email is preferred as this is the unique identifier for the account.

O. Referral Type:

BP Parent

P. If you were referred by someone, who may we thank? Which location do they attend? Please provide a contact email (or phone number) so we can send them a thank you!

Harry-potter@gmail.com.

Q. Please select payment type:

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-
- Private Pay
- Ohio Department of Job and Family Services
- Child Care Aware (NACCRRRA)
- Ohio County
- Ohio Ed Choice

Select Payment type using the drop-down menu

Parent Registration DCW

Add Student information



Student Information

First Name *

Middle Name

Last Name *

Gender * Male Female Unassigned

Birthday *

Address Information

Address 1 *

Address 2

City *

State *

Zip *

← **Enter student details and address information here.**
NOTE: Starred * fields are mandatory.

Parent Registration DCW

Add extra information - Medical



Extra Information

<p>Home Phone</p> <input type="text" value="(123) 123-1233"/>	<p>Age Category</p> <input type="text" value="N/A"/>
<p>Language Spoken</p> <input type="text" value="Language Spoken"/>	<p>Secondary Language</p> <input type="text" value="Secondary Language"/>
<p>In an Emergency Call First</p> <input type="text" value="Shannon Testing"/>	
<p>Sibling Name (if Sibling Discount)</p> <input type="text" value="Sibling Name (if Sibling Discount)"/>	

Enter as much information as possible under Extra information and Medical Information fields.

NOTE: Starred * fields are mandatory.

Medical Information

NOTE: If the family does not have a Child Health Care number, enter zeros in this field.

<p>Child Health Care Number</p> <input type="text" value="00000000"/>	<p>Doctor's Name</p> <input type="text" value="Madam Pomfrey"/>
<p>Doctor's Address</p> <input type="text" value="Hogwarts"/>	<p>Doctor's Phone</p> <input type="text" value="(000) 000-0000"/>

Parent Registration DCW

Guardian 1 & 2 and Employer Information



Enter as much information as possible under Guardians and Employer fields.

NOTE: Starred * fields are mandatory.

Guardian Information 1

First Name	Last Name
<input type="text" value="Shannon"/>	<input type="text" value="Testing"/>
Relationship Type	
<input type="text" value="Family Friend"/>	
<input checked="" type="checkbox"/> Address same as Student	
Address 1	Address 2
<input type="text" value="1234 Ottery St."/>	<input type="text" value="Address 2"/>
City	State
<input type="text" value="Catchpole"/>	<input type="text" value="NS Nova Scotia"/>
Zip	Home Phone
<input type="text" value="93493"/>	<input type="text" value="(123) 123-1233"/>
Work Phone	Cell Phone
<input type="text" value="(222) 222-2222"/>	<input type="text" value="(123) 123-1234"/>
Email	Confirm Email
<input type="text" value="SMcwhorter@Brightpathkids.com"/>	<input type="text" value="SMcwhorter@brightpathkids.com"/>
Electronic Signature	
<input type="text" value="Shannon Testing"/>	

Employer Information

Employer Name	Address
<input type="text" value="Hogwarts School of Magic"/>	<input type="text" value="Owl Mail"/>
City	State
<input type="text" value="Highlands"/>	<input type="text" value="NS Nova Scotia"/>
Zip	
<input type="text" value="93493"/>	

Guardian Information 2

Guardian Information is N/A

NOTE: If no Guardian 2, select N/A

First Name	Last Name
<input type="text" value="N/A"/>	<input type="text" value="N/A"/>
Relationship Type	
<input type="text" value="N/A"/>	
<input checked="" type="checkbox"/> Address same as Student	
Address 1	Address 2
<input type="text" value="1234 Ottery St."/>	<input type="text" value="Address 2"/>
City	State
<input type="text" value="Catchpole"/>	<input type="text" value="NS Nova Scotia"/>
Zip	Home Phone

Parent Registration DCW

Emergency Contacts



Contact Information 1

Emergency Contact

First Name Last Name

Relationship Type

Contact Group

Address 2 Home Phone

Work Phone Cell Phone

Contact Information 2

Emergency Contact

First Name Last Name

Input information under Emergency Contacts Fields.

NOTE: parents must select the drop-down box to showcase "Emergency Contact" - Parent must include two Emergency Contacts to proceed (cannot be guardian 1 or 2)

NOTE: Starred * fields are mandatory.

NEXT

Once Completed Click "Next"

Parent Registration DCW

Add a Second Student





Current Registrations

  Ron Weasley
[Add More Programs](#)
[Print Info Card](#)

 [Add a New Student](#)

NOTE: New families **MUST** register multiple children in 1 account to avoid multiple accounts (Add a New Student).

Your Program Selections


  Ron Weasley
Union - Registration - Brightpath - OH
Ohio Ongoing: 04/22/2024 - 11/16/2099
[Edit Program Information](#)

Registration Fee:	\$125.00
Pre-Bill:	\$500.00
Total:	\$625.00

 [Apply Registration Code \(if applicable\)](#)

Scholarship

Please enter a promotional code

 BPOHFAM24

If Applicable, click here to open promotional code pop-up and enter promo code.

Parent Registration DCW

Connect Portal Account Creation



This is where the parent creates their unique User ID and password to login to their DCW account.

Connect Portal Account Creation Edit

Requested User Id Requested For Parent *

Guardian 1

Requested Password

Confirm Password

Primary Guardian E-Signature Secondary Guardian E-Signature

Password requirements:

- Password length must be between 12 and 32 characters
- Password must not contain the user name
- Password must contain at least three of the following elements:
 - At least one uppercase letter
 - At least one lowercase letter
 - At least one number
 - At least one special character

NOTE: All confirmation Questions MUST be selected to proceed.

Connect Portal Account Creation Edit

Confirmation Questions Edit

All mobile children will go outside unless the wind chill is below zero. We go outside in all weather, (except for lightning). Please send your child to school dressed for the weather, and during the summer months provide proper sunscreen. We have mud outside (wet, messy, dirty mud) your child will play in the mud and therefore may get wet, messy, and dirty. Please Dress your child appropriately for the weather conditions every day.

Children are required to have a change of clothing (including boots) to be kept at the school. They will also need a pair of slippers/inside shoes for use in the classrooms during the day. Please label all clothing. The Children's House is not responsible for lost items.

Discipline and guidance are consistent and based on individual needs and development. We promote self-discipline and self-control. Physical punishment is never permitted. Instead, we use redirection. We reserve the right to disenroll any child at any time if it is in the best interest of the child or children at The Children's House. Please refer to the parent handbook for the complete discipline policy.

Each child is required to have a current, updated medical and immunization record prior to enrollment. Medical documentation must be updated annually. All children must be vaccinated under a doctor's care, with updated vaccinations within 6 months of the recommended CDC requirements, unless a signed waiver has been provided.

Families are required to ensure that their child is under the supervision of a teacher before leaving. At pick up, families must notify the teacher that they are picking up their child. Our school day begins at 9:00 a.m. All children should be present at this time. If your child is going to be absent, please call the center or mark your child absent on the app. If your child is not present by 10:00 a.m. we will assume that they will be absent for the day.

Parent Registration DCW

Add Payment Information



Payment Information Edit

Payment Type

★

Credit Card
ACH/E-Check

First Name on Card ★ Last Name on Card ★

Billing Address ★ Billing City ★

Billing State ★ Billing Zip ★

Billing Phone

Billing Email ★ Confirm Email ★

[Go Back](#)

Subtotal	\$125.00
Pre-Bill	\$500.00
Convenience Fee	\$15.63
Amount Due	\$640.63

[Clear Registration](#) [Complete Registration](#)

Choose Payment type from drop down menu.

Fill in all Payment details and billing information in Payment information fields.

Click "Complete Registration".

NOTE: Amount due will not be charged until CSC approves account. Once submitted parent will receive an email confirmation from DCW with their enrollment information.

Parent Registration DCW


Complete the Registration & Submit



Scholarship Amount: OHSTAFF24

(\$625.00)

Your Program Selections

	Ron Weasley	Registration Fee:	\$125.00
	Union - Registration - Brightpath - OH	Pre-Bill:	\$500.00
	Ohio Ongoing: 04/22/2024 - 11/16/2099	Total:	\$625.00

[Edit Program Information](#)

Connect Portal Account Creation

Confirmation Questions

Payment Information

Payment Type

\$ Check Out

Subtotal	\$125.00
Pre-Bill	\$500.00
Discount	(\$625.00)
Amount Due	\$0.00

Check out and Click "Complete Registration"

Registration FAQ



Below are the most common errors encountered during the registration process:

1. All starred * Fields are **mandatory fields**.
2. Expecting Parents should write **"Baby" or "TBD" as baby's name**.
3. Expecting Parents should input their **Due Date as the Date of Birth**.
4. Health Insurance Information can be **bypassed by inputting zeros or NA**.
5. For any health/medical boxes, **if checking No**, the best practice is to also **input NA in these boxes**.
6. **Emergency Contacts** - parents must select the drop-down box to showcase "Emergency Contact" - Parent must include **two Emergency Contacts to proceed (cannot be guardian 1 or 2 information)**.
7. Ensure correct form of pay is selected, Private Pay (parent is paying) or different subsidy options.
8. New families **MUST register multiple children to same account**. The second child details can be added by selecting **Add a New Student**.
9. If only one guardian **Select NA for Guardian 2**.

Links and Resources

Located on the Portal

1. Each Center Director Portal will have the corresponding **Availability Tracker** to make updating weekly an easy process.
2. The **Portal Guide** is a one-page reference sheet to review each element on the Portal.
3. Fillable **Enrollment Forms**.
4. Link to the [Connect App](#).
5. Link to tour resources including a **Tour Prep-Sheet** and elements to discuss during and after the tour.
6. Training **Guides**.
7. A link to the **Marketing Page** for updating your center information, photos, and bios (contact marketing@brightpathkids.com for specific information).



The Availability Tracker

The Availability **tracker** is a tool to allow for transparency amongst departments on every center's FTE availability. This also an important guide to enrolling quickly for each age group.

The tracker also identifies the following:

1. FTE that is available now and in the upcoming months
2. Staffing issues that are inhibiting enrollment
3. Discrepancies between DCW and our forecasting



The Availability Tracker

How To Update

1. Find your center by clicking on your area directors tab at the bottom of the sheet.

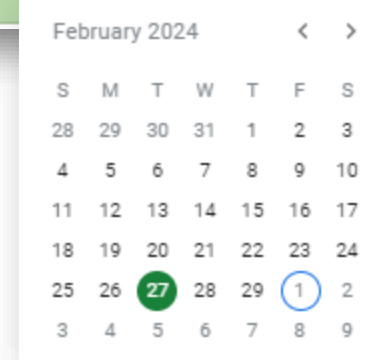


2. Update the date in column E.

Note: If you double-click on the cell, you can choose from the calendar pop-up.

Note: The date column will auto highlight in red on dates needing to be updated.

A	B	C	D	E	F	G	H	I	J
Centre Name	Category	Sum of Capacity	DCW Avail	Enter date you updated	(Manually Update Numbers) Available Spaces Mar	(Manually Update Numbers) Available Spaces April	(Manually Update Numbers) Available Spaces May	Staffing Limitation/ Staff Needed to Enroll	Comments & CONFIRM accuracy WEEKLY
Braintree		0							
Braintree	Care.com Registrations	0							
Braintree	MA Infant: 0 - 15 Mths	14		2/27/2024	3	3	3	YES	1 FT and 2 PT (MWF) and (TH,F) need to hire2 teachers
Braintree	MA Kindergarten	0							
Braintree	MA Preschool: 33 Mths - School Age	40		2/27/2024	2	2		YES	2 FT and 3 PT (2 MWF and 1 MF)
Braintree	MA School Age	0							
Braintree	MA Toddler: 15 - 33 Mths	27		2/27/2024	6	6	6	YES	4 Full time and 5PT (4MWF and 1 TW) need to hire two teachers
Braintree Total			118.7		11	11	9		



The Availability Tracker

How To Update Continued.

3. Add your available FTE in columns F,G,H,I using **Numbers Only** in the row of the corresponding age group in the correct month column.

Note: If letters are entered in these columns the total won't calculate.

4. If you have part-time spaces indicate which days and how many spaces in the comment section, Column "H".

Liz Centres										
Centre Name	Category	Sum of Capacity	DCW Avail - Next Month	Enter date you updated	(Manually Update Numbers) Available Spaces Mar	(Manually Update Numbers) Available Spaces April	(Manually Update Numbers) Available Spaces May	(Manually Update Numbers) Available Spaces September	Staffing Limitation/ Staff Needed to Enroll	Comments & CONFIRM accuracy WEEKLY
Highland Park	AB Infant: 12 Mths - less than 19 Mths	12		2/26/2024	1.4	1.4	1.4		NO	1 FT, 1 T/TH
Highland Park	AB Infant: Infant less than 12 Mths	3		2/26/2024	0	0	0		NO	
Highland Park	AB Preschool: 3 Yrs to less than 4 Yrs	22		2/26/2024	0	0	0		NO	
Highland Park	AB Preschool: 4 Yrs and Older	20		2/26/2024	0	0	0		NO	
Highland Park	AB Toddler: 19 Mths to less than 3 Yrs	18		2/26/2024	0	0	0		NO	
Highland Park Total		75	2.3		1.4	1.4	1.4			

The Availability Tracker

How To Update Continued.

5. Fill out the staffing column "J" by simply selecting **Yes** or **No** from the drop-down menu
6. Specify how staffing is impacting enrollment in the comment section

Category	Sum of Capacity	DCW Avail - Next Month	Enter date you updated	(Manually Update Numbers) Available Spaces Mar	(Manually Update Numbers) Available Spaces April	(Manually Update Numbers) Available Spaces May	(Manually Update Numbers) Available Spaces September	Staffing Limitation/ Staff Needed to Enroll	Comments & CONFIRM accuracy WEEKLY
AB Infant: 12 Mths - less than 19 Mths	12		2/26/2024	1.4	1.4	1.4		NO	1 FT, 1 T/TH
AB Infant: Infant less than 12 Mths	3		2/26/2024	0	0	0		YES	need to hire third staff member
AB Preschool: 3 Yrs to less than 4 Yrs	22		2/26/2024	0	0	0		NO	
AB Preschool: 4 Yrs and Older	20		2/26/2024	0	0	0		NO	
AB Toddler: 19 Mths to less than 3 Yrs	18		2/26/2024	0	0	0		NO	
	75	2.3		1.4	1.4	1.4	0		

Forecasting Spaces

Forecasting availability into the future is very important to ensure we are confident to enroll families.

Director's Process to Pull Room Reports in DCW

- From the home page on DCW, the CD would click on Reports - Program.
- Click on Room/Program Report
- Report Category will be "General" and the report will be "Room Report as PDF"
- Choose the classroom you need and from what date range (week).

These reports will allow you to see the enrolled children and schedules in each room for the selected week.



Referral Program

What is it and how can I promote it?

We offer a \$350 credit to our families for any family they refer who enrolls. **There is no limit to the number of referrals a family can make!**

The credit will be applied to their account a month after the new referred family starts.

What you can do to promote the program!

- Add it to your monthly newsletter
- Post the referral flyer on your parent board
- Let your tours know that we offer a referral program



Thank you!

