applicaa

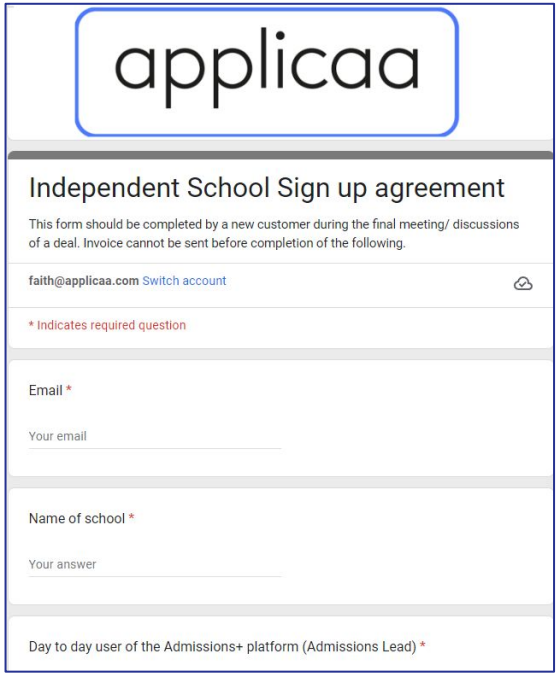
Admissions+ Onboarding Process

For Independent Schools

WEEK 1

SET UP AGREEMENT FORM COMPLETION

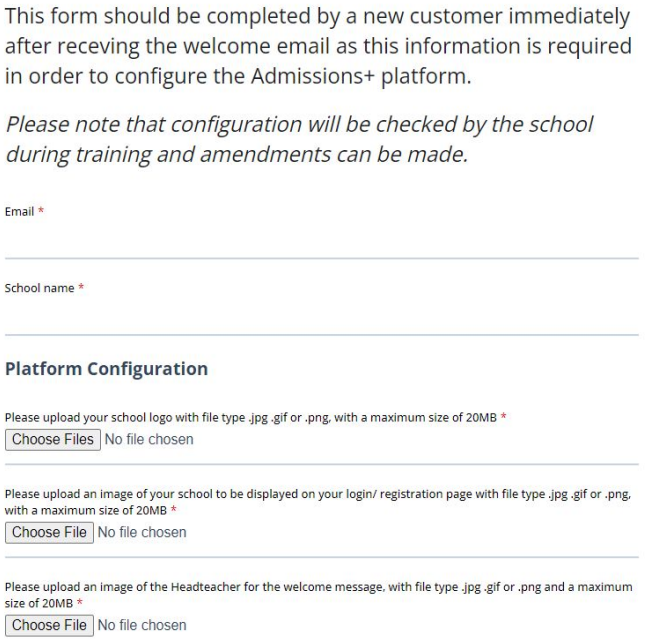
This form will be completed with your Sales Manager prior to the invoice being sent to you.



RECEIVE WELCOME E-MAIL

The Welcome email contains a Configuration Form that you are required to complete with the requested information, so we can configure your platform

Please ensure you complete this form with everything that we need within 48 hours



This form should be completed by a new customer immediately after receving the welcome email as this information is required in order to configure the Admissions+ platform.

Please note that configuration will be checked by the school during training and amendments can be made.

Email *

School name *

Platform Configuration

Please upload your school logo with file type .jpg .gif or .png, with a maximum size of 20MB *

Choose Files No file chosen

Please upload an image of your school to be displayed on your login/ registration page with file type .jpg .gif or .png, with a maximum size of 20MB *

Choose File No file chosen

Please upload an image of the Headteacher for the welcome message, with file type .jpg .gif or .png and a maximum size of 20MB *

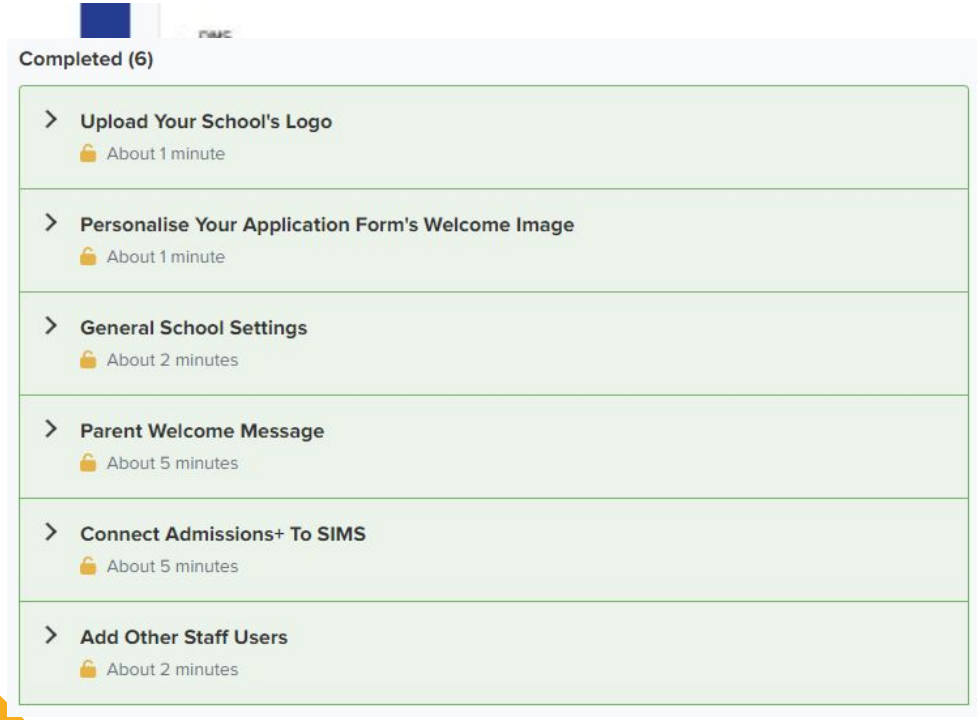
Choose File No file chosen

WELCOME MEETING WITH CSM

Day-to-day users of Admissions+ will have a welcome meeting with the designated Customer Success Manager

- Reiterate the role of CSM and others
- Book all training sessions
- Book integration meeting for IT
- Answer any queries

INITIAL PLATFORM CONFIGURATION



Using the information you have given us, we will create and configure the platform for you within 48 hours

INTEGRATION MEETING

Your IT Manager will have a meeting with our Lead Technician (Andy) to set up the MIS integration

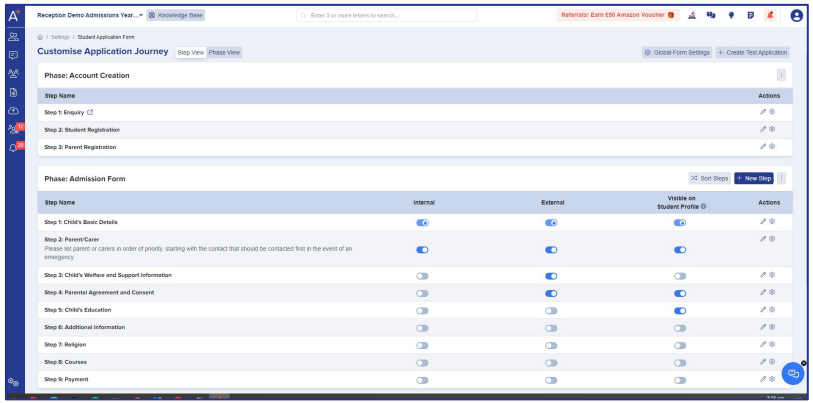
A guide will be sent ahead of time to prepare your MIS database

WEEK 2

FIRST MEETING & RESOURCES

Two-hour meeting covering -

Overview of the platform
Overview of the Application
Phases & Form Area
Walkthrough creating an enquiry
Additional Questions



Admissions+

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- An overview of the platform
  - Dashboard features
  - Landing/ registration page
  - Welcome messages
  - Parent homepage
- An overview of the application phases
  - Enquiries
  - Applications
  - Offer Contracts
  - Post Acceptance
- Walking through the journey as an enquirer
- Additional questions

To continue with our progress, please complete the following tasks over the next few days:

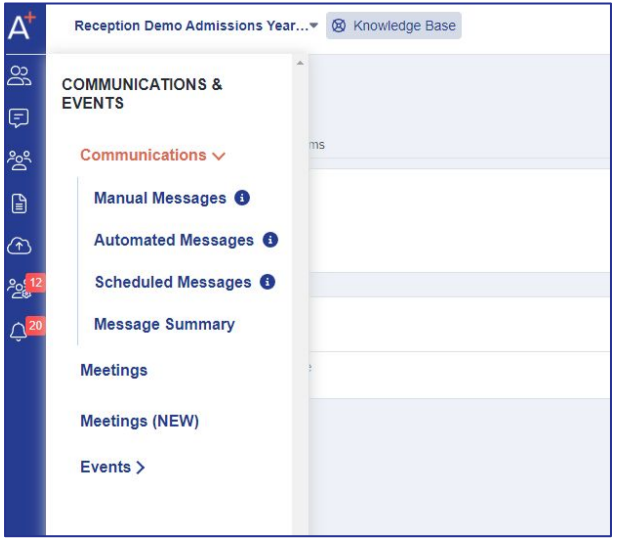
- Study *how to create and use test accounts*
- Create a test account & follow through form, making note of any changes needed & where they are.
- Use this *detailed form guide* to make these amendments ready for checking in our next session

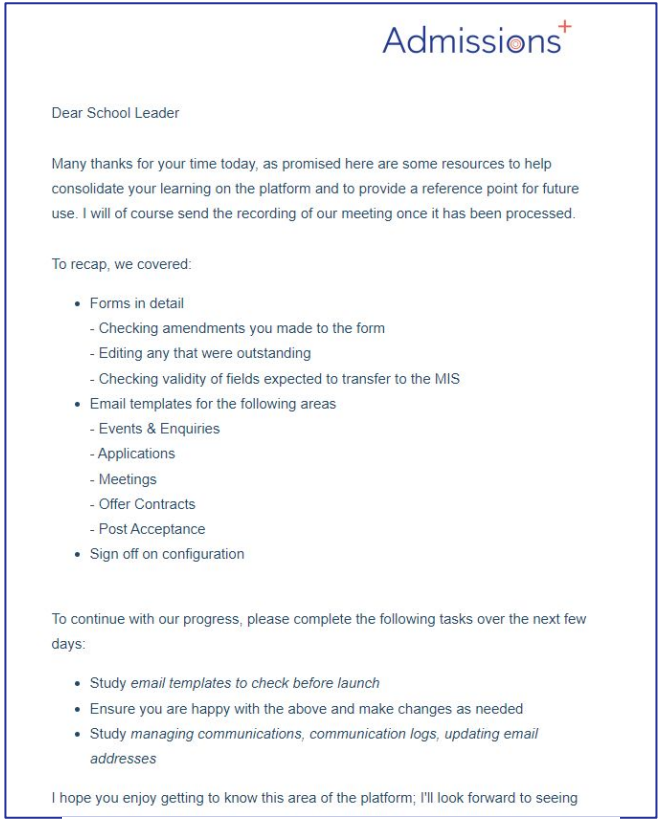
Resources will be provided to consolidate your learning

SECOND MEETING & RESOURCES

Two-hour meeting on form detail and e-mail templates

- Configure e-mail templates
- Check each phase of the form
- Sign off configuration





Admissions+

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To recap, we covered:

- Forms in detail
  - Checking amendments you made to the form
  - Editing any that were outstanding
  - Checking validity of fields expected to transfer to the MIS
- Email templates for the following areas
  - Events & Enquiries
  - Applications
  - Meetings
  - Offer Contracts
  - Post Acceptance
- Sign off on configuration

To continue with our progress, please complete the following tasks over the next few days:

- Study *email templates to check before launch*
- Ensure you are happy with the above and make changes as needed
- Study *managing communications, communication logs, updating email addresses*

I hope you enjoy getting to know this area of the platform; I'll look forward to seeing

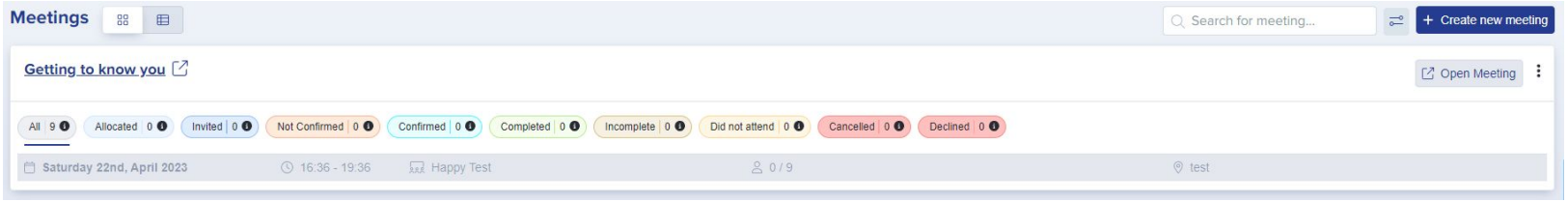
Resources will be provided to consolidate your learning

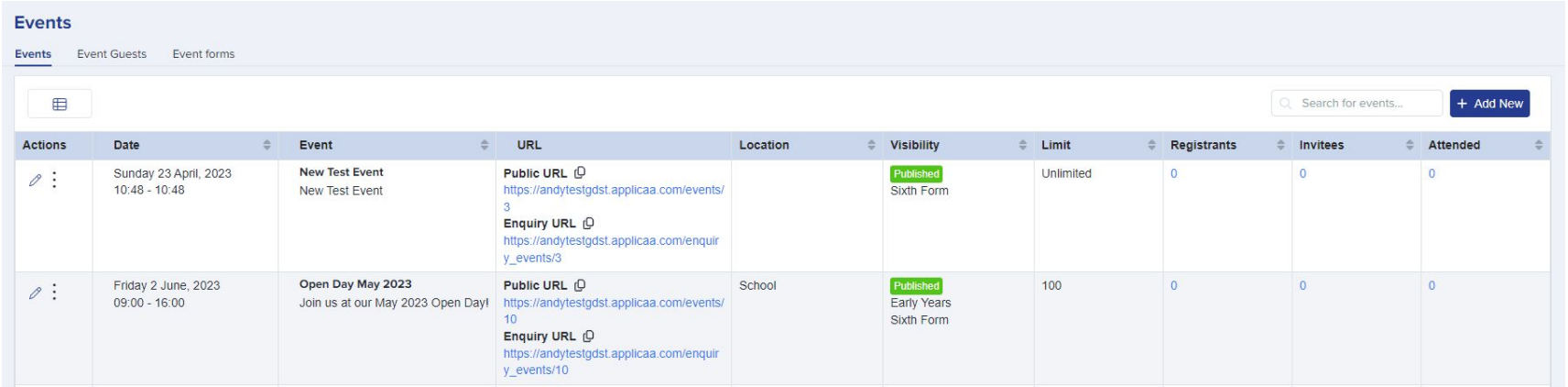
WEEK 3

THIRD MEETING & RESOURCES

Two-hour meeting on events, managing enquiries, meetings and testing these areas

Resources will be provided to consolidate your learning

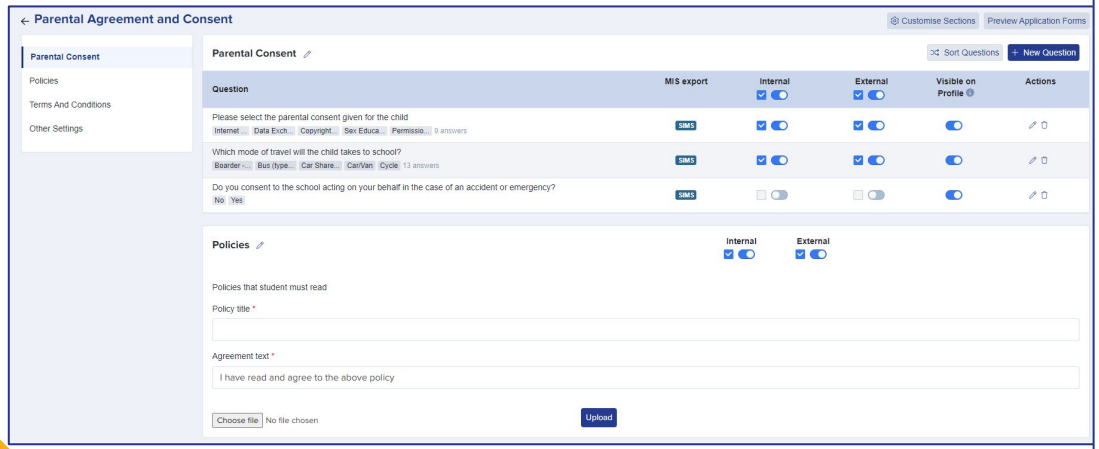




FOURTH MEETING & RESOURCES

Two-hour meeting covering:

- Payments
- Offer Contracts
- Post Acceptance



Resources will be provided to consolidate your learning

Admissions+

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Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- Offer Contract Phase
  - Offer letter templates
  - Emails
  - Bill payers
  - Fees data
  - Offer acceptance/ terms wording
- Post Acceptance
  - Configuration of your uploaded information
  - Overview of form with tips to tweak closer to the time if needed

To continue with our progress, please complete the following tasks over the next few days:

- Study *this Offer Contract guide*
- Familiarise yourself with *bill payer* settings
- Study further how *fees data* impacts the system
- Double check *email templates* relevant to Offer Contracts

I hope you enjoy getting to know this area of the platform; I'll look forward to seeing you in a few days.

With best wishes,

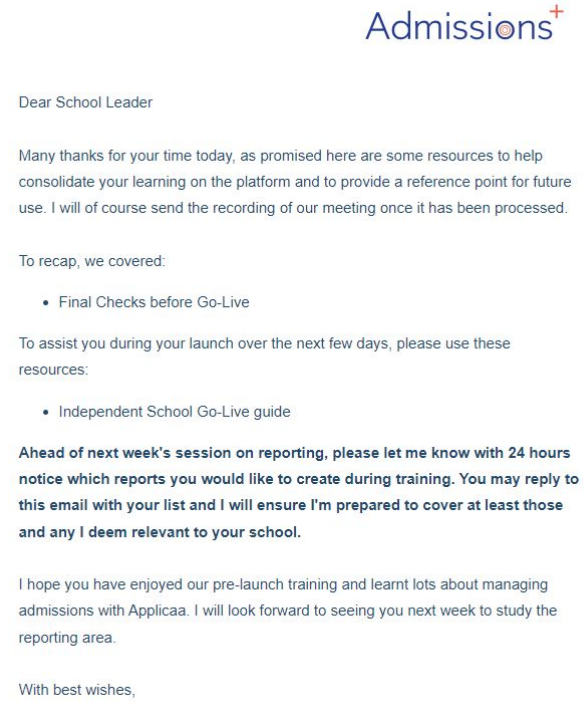
WEEK 4

FINAL CHECKS BEFORE GO-LIVE

One-hour meeting for final checks before going live

Learn troubleshooting skills

Resources will be provided to consolidate your learning



Admissions+

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- Final Checks before Go-Live

To assist you during your launch over the next few days, please use these resources:

- Independent School Go-Live guide

Ahead of next week's session on reporting, please let me know with 24 hours notice which reports you would like to create during training. You may reply to this email with your list and I will ensure I'm prepared to cover at least those and any I deem relevant to your school.

I hope you have enjoyed our pre-launch training and learnt lots about managing admissions with Applicaa. I will look forward to seeing you next week to study the reporting area.

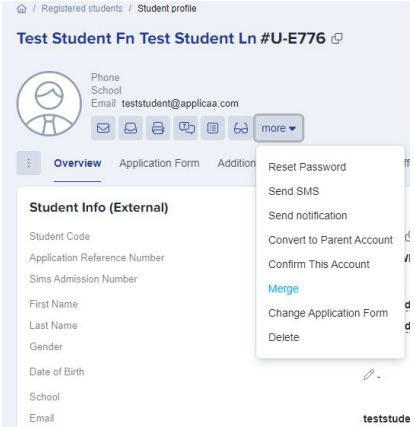
With best wishes,

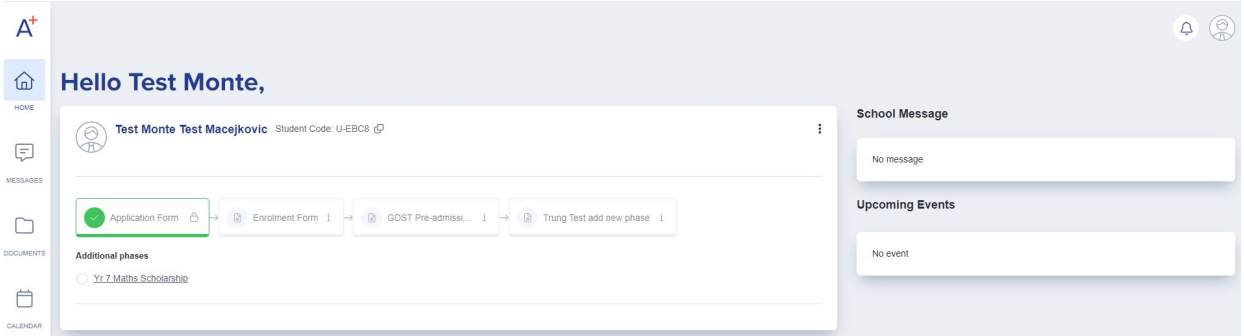
WEEK 5

SIXTH MEETING & RESOURCES

Two-hour meeting on managing live applications and using the reporting area

- Merging Accounts
- Common Errors
- Impersonate Student Profile
- Set up reports





Admissions+

Dear School Leader

Many thanks for your time today, as promised here are some resources to help consolidate your learning on the platform and to provide a reference point for future use. I will of course send the recording of our meeting once it has been processed.

To recap, we covered:

- Managing live enquiries
  - Merging accounts
  - Common errors
  - Impersonation
- Reporting
  - Your list of desired reports
  - Reports I see commonly used by schools that may be relevant to you

To continue with our progress, please complete the following tasks over the next few days:

- Study *this Reporting guide*
- Revisit *Managing duplicates & Known SIMS Users*
- *Make note as you work of any queries that come up and send to me to request training next week.*

Training is optional during the next two weeks and then your school will be graduating to manage the platform independently.

It has been a pleasure working with you and getting to know your school; I will wait to hear whether you would like training next week and otherwise will check in with you in a couple of weeks.

Week 6

One hour to cover queries raised by the school.

This meeting is optional & content will be sent ahead of time by the school user.

Week 7

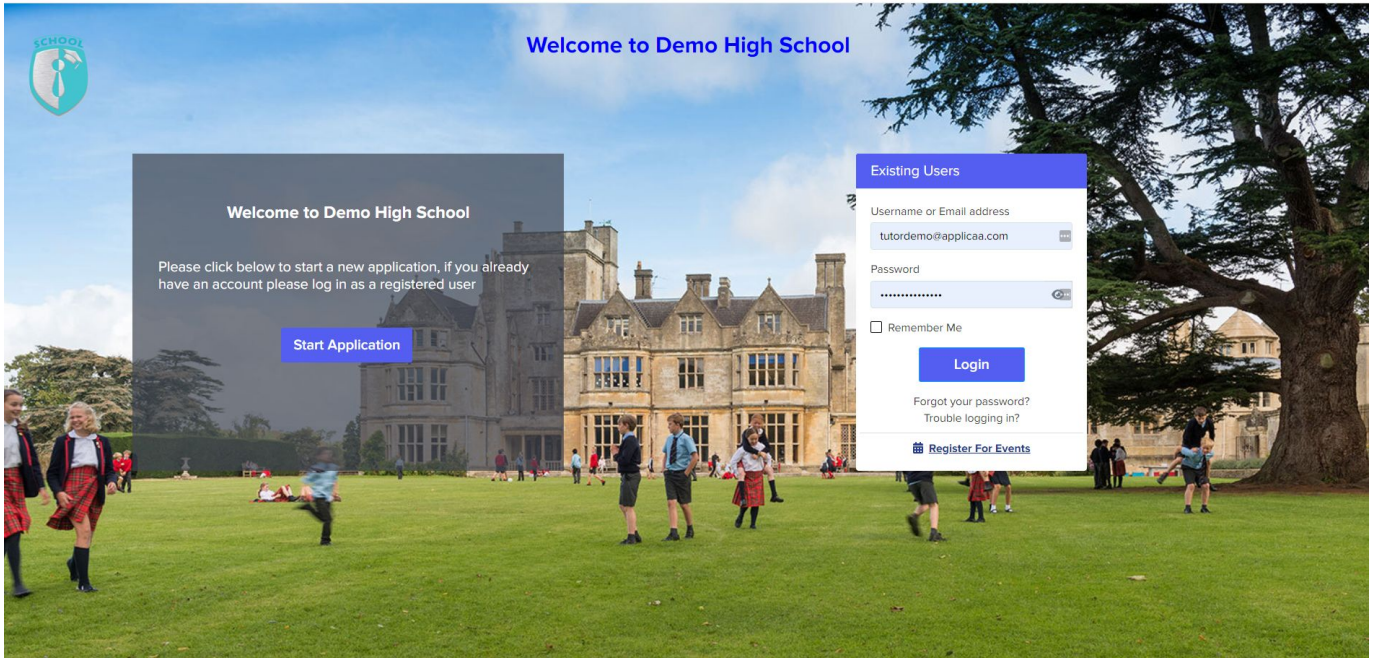
One hour to cover queries raised by the school.

This meeting is optional & content will be sent ahead of time by the school user.

WEEK 8

ONBOARDING TRAINING GRADUATION

Your school will now be able to independently utilise Admissions+ with confidence, and raise tickets for technical issues or queries



REFRESHER TRAINING

Week 12 - CSM calls to check in & see all is well

Ahead of Application launch - CSM calls to check all is well & offer refresher training

Ahead of Offer Contract launch - CSM calls to check all is well & offer refresher training