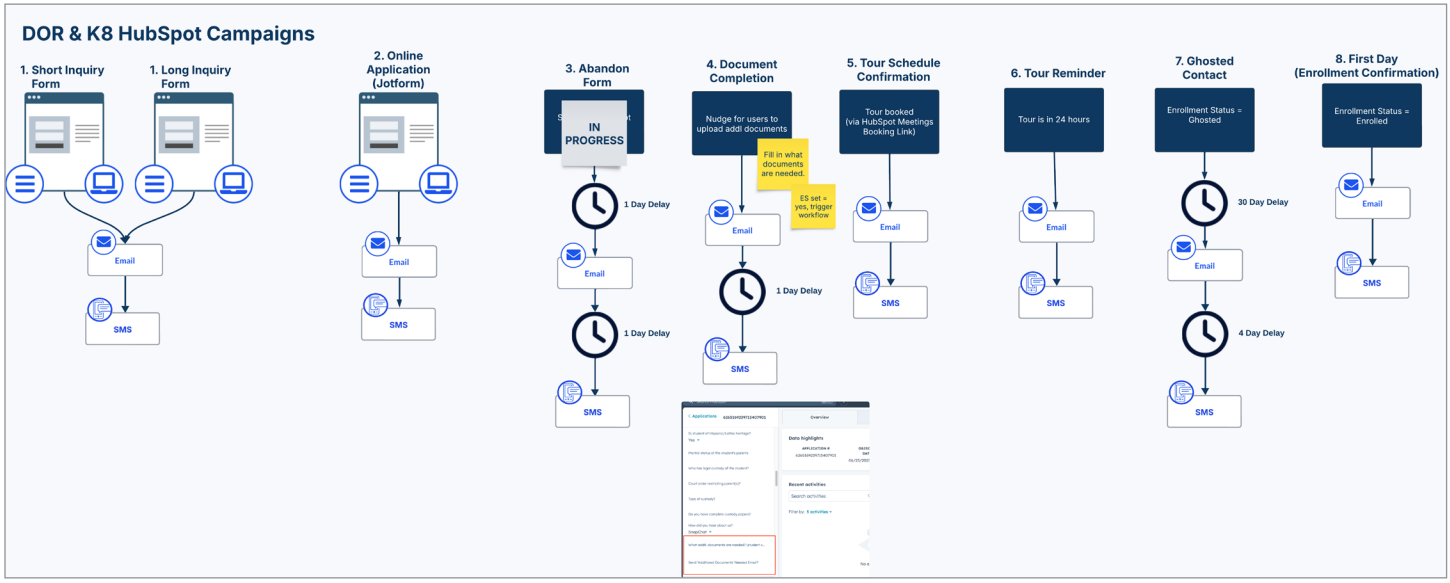
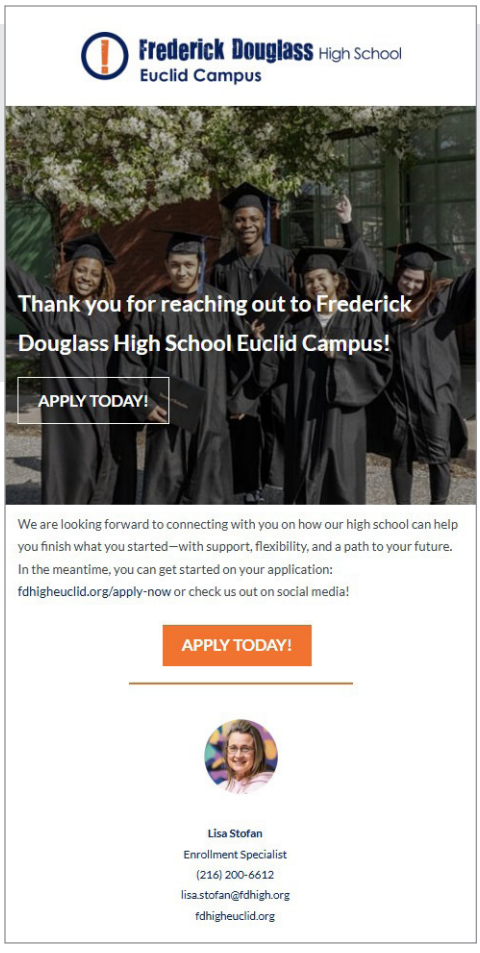
Oakmont Education Student Journey & HubSpot Workflow



Contacts are created in HubSpot through 4 different methods:

- Short Form Submission (Homepage)
- Long Form Submission (Website See for Yourself page)
- Application Submission (Website Apply Now page)
- Quick Create form (Inside HubSpot)

Workflow Automations



Workflow #1:

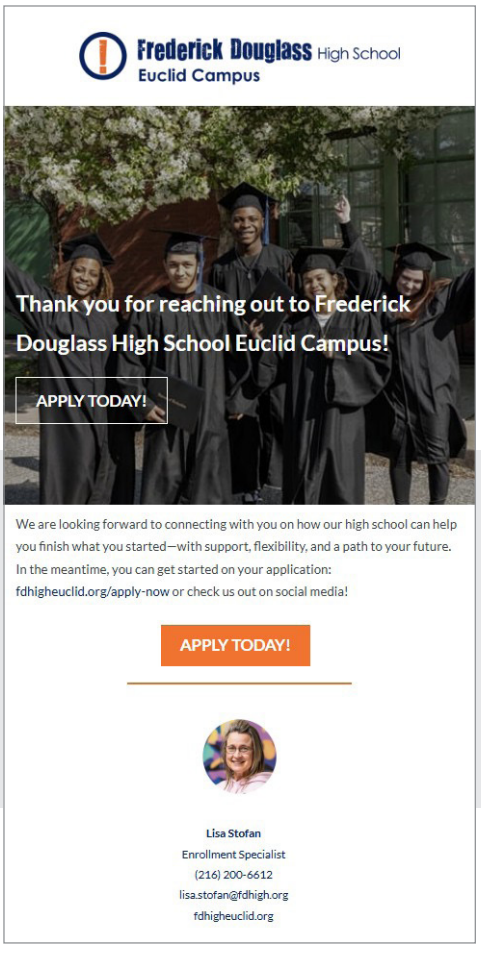
Short & Long Form Inquiry Response **Email,** Short & Form Inquiry Response Text Message

Text Message:
Thanks for reaching out to Frederick Douglass High School Euclid Campus! Start your application now at https://www.fdhigheuclid.org/apply-now/ — we'll be in touch to help you finish what you started.

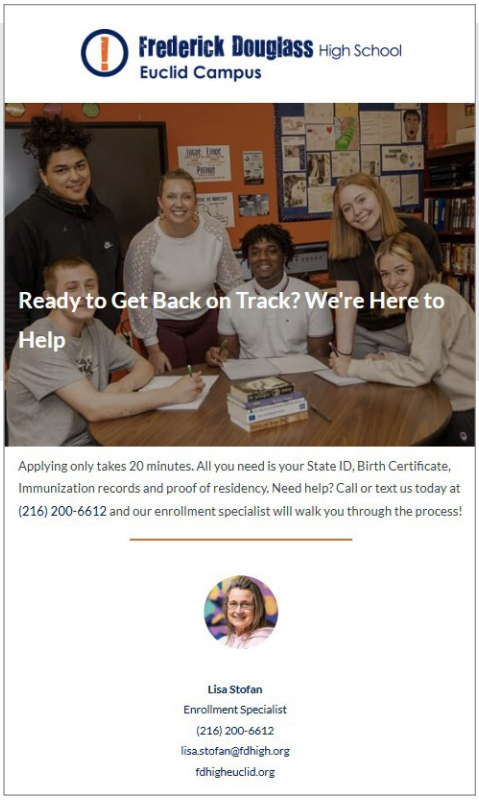
Workflow #2:

Online Application Inquiry Response **Email**, Online Application Inquiry Response Text

Text Message:
Thank you for completing your application! We will contact you directly to finalize your enrollment at Frederick Douglass High School Euclid Campus.



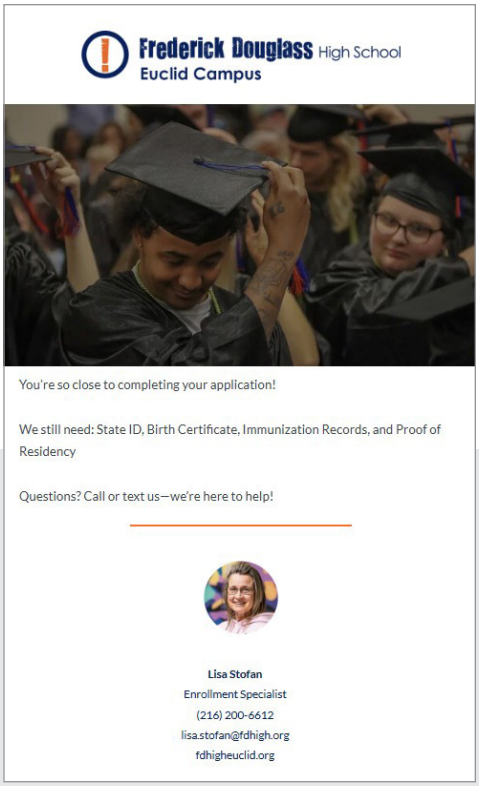
Workflow Automations *continued*



Workflow #3:

Abandon form **Email** & Text Message (In Development)

Text Message:
Let's finish your application! It takes 20 mins with ID, birth cert, immunizations & proof of residency. Need help? Call or text Frederick Douglass High School Euclid Campus today at (216) 200-6612.

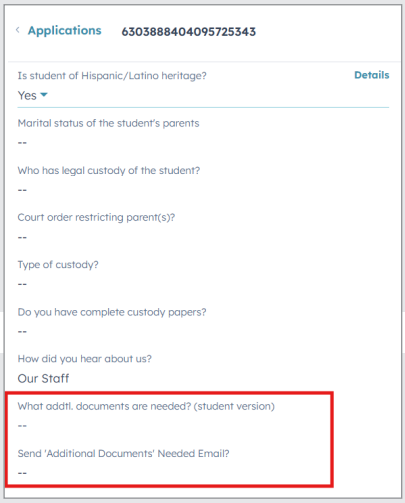


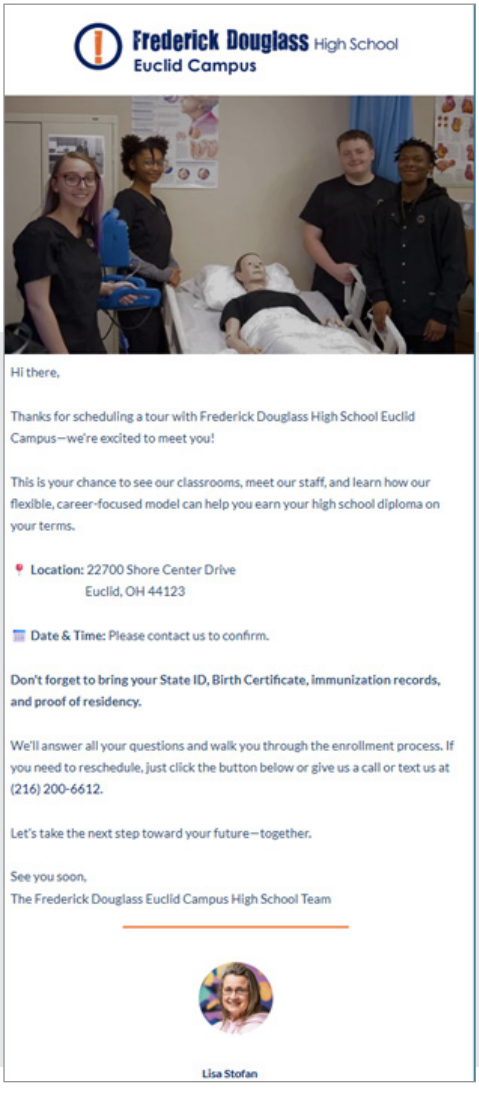
Workflow #4:

Document Completion Email, Document Completion Text
(Must be manually triggered)

Text Message:
You're almost done with your Frederick Douglass High School Euclid Campus application! We just need: {specify field}. Questions? Call or text us at (216) 200-6612—we're here to help!

Trigger this automation on the application record. If you leave the "additional documents needed" field empty, the message will populate with all required documents.





Workflow #5:

Tour Schedule Confirmation **Email**, Tour Schedule Confirmation Text

Text Message:
Your tour at Frederick Douglass High School Euclid Campus is confirmed! We can't wait to meet you on {tour time & date}. Questions or need to reschedule? Call or text us at (216) 200-6612. See you soon!Campus today at (216) 200-6612.

Setup your 'Book a Tour' link with HubSpot Meetings
https://app.hubSpot.com/meetings/49449970

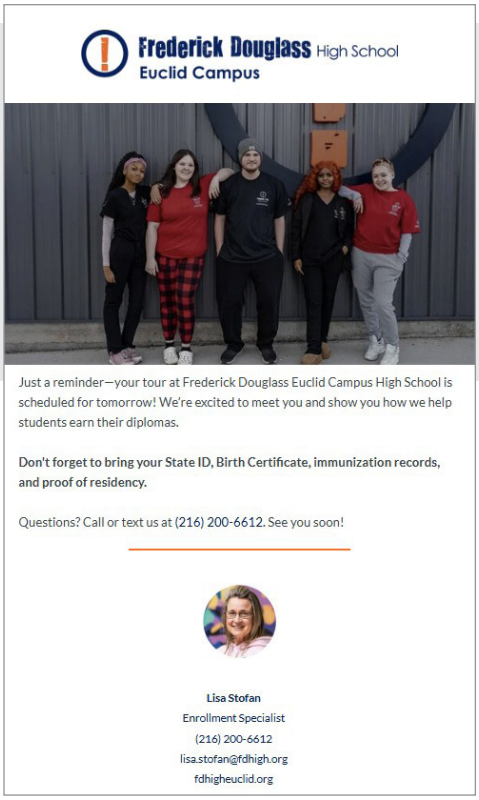
Create Scheduling page > One-to-One

Screen 1: These are the details that will be included on the meeting invite that is automatically sent from HubSpot when a tour is booked.

Screen 2: These are the details around the length of the tour and availabilityForm tab: add any additional details you want to collect with the invite and turn ON "Allow Guests". This will allow you to add additional family members to the invite.

Screen 3: We have pre-built custom confirmation emails and reminders that will send. Toggle both of these items OFF.
You've officially created your tour booking link! Bookmark the URL so you can easily access it moving forward and share it with any other team members who might be booking tours.

Workflow Automations *continued*



Workflow #6:

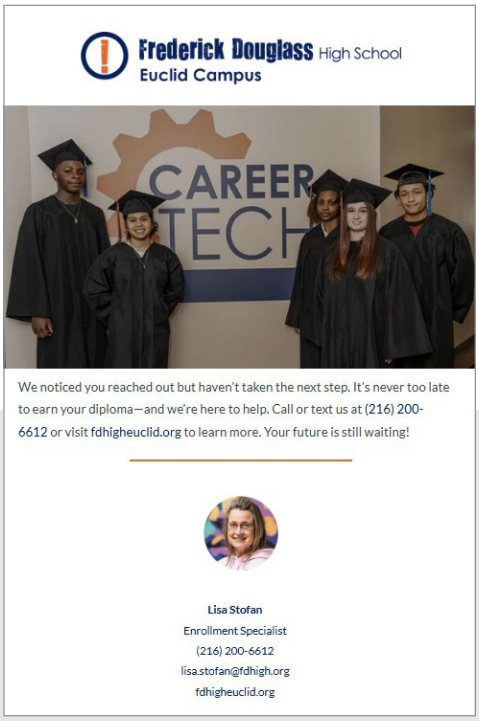
24-hour prior to tour reminder **email,** 24-hour prior to tour reminder text

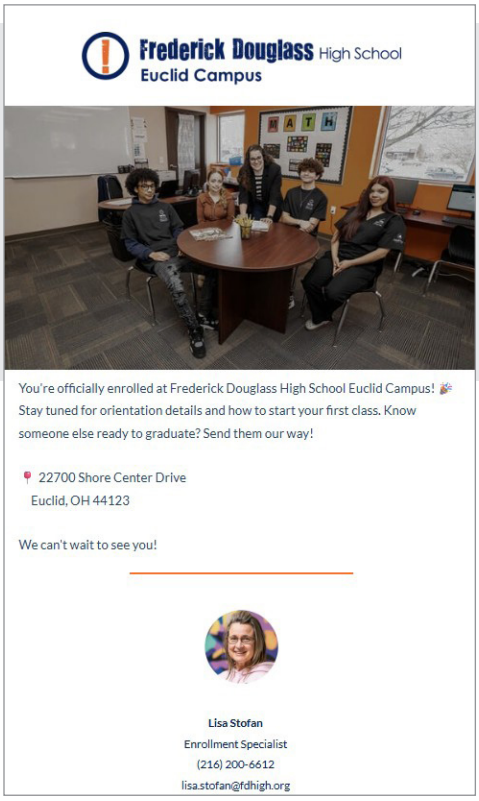
Text Message:
Your tour at Frederick Douglass High School Euclid Campus is tomorrow! We can't wait to meet you on {Tour date & time} at 22700 Shore Center Drive Euclid, OH 44123. Questions? Call or text us at (216) 200-6612.

Workflow #7:

Ghosted contact follow-up Email,
Ghosted contact follow-up Text

Text Message:
You reached out to Frederick Douglass High School Euclid Campus—ready to take the next step? Call or text us at (216) 200-6612. It's not too late to finish your diploma. We're here to help!





Workflow #8:

First day email "you are enrolled" Email,
First day email "you are enrolled" Text

Text Message:
You're enrolled at Frederick Douglass High School Euclid Campus! Watch for orientation info. Know someone else ready to graduate? Send them our way! info-euclid@fdhigh.org