

Making It Count: The 12 Step Lock-In Process

Presented by the Home Office Admissions
Department

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Objectives

- Recognize the purpose of the lock-in process
- Identify the 12 steps of the lock in process
- Distinguish the purpose of all 12 steps
- Determine the appropriate action based on the guidelines of the Lock-In Process, given a scenario

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The 12 Steps of the Lock-In Process

1. Effective interview with campus tour
2. DOA meeting
3. 24 congratulatory card
4. 24 hour congratulatory call
5. Conditional acceptance letter
6. Financial aid packaging

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The 12 Steps of the Lock-In Process

7. Accountability meetings
8. Lock-in letter series
9. Representative contact
10. Lock-in events
11. New student orientation
12. Start week

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The Admissions Team and YOU

- Provide positive reinforcement and support
- Increase students' likelihood of starting school

“Kaplan is committed to helping its students follow through on their plans for a better future”

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Buyer's Remorse

- May cause students to doubt their decision
- May occur 24-48 hours after enrolling
- Can be caused by self-doubt
- Can be caused by negative feedback from the Buying Committee, people who control or influence resources the student may need, such as financial or emotional support

“Your Kaplan school is most often the best chance students have to better their lives”

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Why the Lock-In Process?

- Increase students who start class
- Decrease the number of students who discontinue attending their program
- Provide feedback on the quality of service students experience during the enrollment process

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Step 1: Effective Interview with Campus Tour

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Step 1: Effective Interview and Tour

Uses Dimensions of Professional Admissions (DPA) to:

- Explore a student's needs and wants
- Highlight features, advantages, and benefits
- Build relationships
- Handle objections
- Provide support

“Ultimately, an effective interview and tour should present Kaplan as a solution to the student's problem”

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Step 2: DOA Meeting

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Step 2: DOA Meeting

Occurs after the student has enrolled

Purpose of Meeting

- Make sure student's needs were addressed
- Confirm understanding of expectations and next steps
- Reinforce decision and solidify commitment

Student Expectations

- Proof of Graduation
- Program Specific Requirements
- Complete Financial Aid
- New Student Orientation

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Step 3: 24 Hour Congratulatory Card

CampusVue Alert!

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Step 3: 24 Hour Congratulatory Card

Provide positive reinforcement to the student

- Representatives should hand-write a note of encouragement
 - Personalized and enthusiastic
 - Highlights an upcoming step
- The card should be submitted at the **same time** as the enrollment paperwork and should be mailed the **same day**

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**Step 4: 24 Hour
Congratulatory
Phone Call**

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Step 4: 24 Hour Congratulatory Call

- Address buyer's remorse
- Remind the student why enrollment was a beneficial decision
- Explore for any questions or concerns
- Be prepared to handle objections

“Do not be afraid to make the call! Be afraid if you do not make the call”

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Step 5: Conditional Acceptance Letter

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Quiz Instructions - The 12 Step Lock-In Process

You will have the opportunity throughout this training to assess your knowledge of the Lock-In process. Please note that you must receive a score of 80% or higher in order to pass this training. When answering the questions, please choose the most appropriate response.

Good Luck!

Click Play or Next button on Playbar to start the quiz.

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Step 5: Conditional Acceptance Letter

Within 48 hours of enrollment a conditional acceptance letter should be mailed

Required part of the enrollment process

- Congratulates student for making the decision to enroll
- Reminds students of their expectations
- Emphasizes the completion of additional steps, such as POG and background check

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Step 6: Financial Aid Packaging

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Step 6: Financial Aid Packaging

- Explore financial options and determine best resources
- Relieves worry and strengthens confidence and commitment
- Should be completed within 24-72 hours after the enrollment
- Should include the Buying Committee

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Step 6: Financial Aid Packaging

- Remind students to submit their Proof of Graduation within **24-72 hours** of the enrollment
- Call students to remind them of their financial aid appointment and communicate with those who have missed their appointments
- Greet students prior to and after the financial aid appointment

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Step 7: Accountability Meetings

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Step 7: Accountability Meetings

Meet weekly to evaluate the status of enrolled students

Representatives should be prepared to discuss:

- ✓ Communication between the rep and student
- ✓ Financial aid packaging and POG status
- ✓ Comments or concerns about the student's ability to start

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Step 8: Lock-In Letter Series

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Step 8: Lock-In Letter Series

- Mail information to maintain excitement, such as:
 - Articles or statistics on career opportunities
 - Placement news
 - Motivational Materials
 - Testimonials from students, graduates, and employers
- Letters should be mailed:
 - Weekly for frequent start schools
 - Bi-weekly for quarter start schools
 - Monthly for high school seniors

Anything sent to a student must have prior approval!

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Joan just called you to let you know she is having problems changing her shift at work and might not be able to have her new hours approved before classes start. You have kept in contact with Joan over several weeks and know this is something she really wants to do. She has completed all of her financial aid paperwork but has not submitted her high school diploma. The weekly accountability meeting is this afternoon. What should you tell your DOA at the meeting?

- A) Tell your DOA you have talked to Joan every week. She is very excited about going to school, but is still working on obtaining a copy of her high school diploma.
- B) Tell your DOA you have talked to Joan every week and that everything is fine.
- C) Tell your DOA about the conversation you had with Joan this morning about her work schedule. Also, mention she still needs to bring in her proof of graduation.
- D) Tell your DOA that you have had regular contact with Joan and she has completed the financial aid process.

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Match the step of lock-in with its purpose (1-8)

Step in the Lock-In process

Purpose of Step

24 Hour Congratulatory Phone Call

A. Maintain student excitement by mailing approved materials to enrolled students

Accountability Meetings

B. Explore a student's wants and needs and present Kaplan as a solution to the student's problem

Interview and Campus Tour

C. Critical time to address Buyer's Remorse

Conditional Acceptance Letter

D. Helps DOA forecast the start by evaluating status of enrolled students

Lock-In Letter Series

E. Evaluates how well the student's needs have been met

DOA Meeting

F. Officially congratulates a student for enrolling

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Step 9: Representative Contact

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Step 9: Representative Contact

- One of the most important steps in the process
- Representatives are **responsible** for calling their enrolled students regularly to monitor their attitudes and progress as Start Week approaches
- General best practice is to communicate weekly

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Step 9: Representative Contact

- Explore level of commitment/excitement
- Motivate and encourage students
- Discuss the buying committee
- Generate personally developed leads
- Reinforce student expectations required to start school

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Step 10: Lock-In Events

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Step 10: Lock-In Events

The more enrolled students visit the school, the more confident they may feel about their decision to enroll and start school

- Invite all future starts to all events on campus
- Encourage students to bring their friends and buying committee to these events

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Step 11: New Student Orientation

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Step 11: New Student Orientation

Helps prepare the student for the transition into school

- Orientation is **mandatory** for all students
- Letters should be mailed **7-10 days** before orientation
- Representatives should **call and reach** all future starts

Notify your **DOA** if a student is unable to attend

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Step 12: Start Week

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Step 12: Start Week

Representatives should play an active role in helping new students feel comfortable

- The entire admissions staff should greet students, walk them to class, and meet with them after class
- Check their temperature, follow up on paperwork, ask for PDLs, and address any concerns

“Start Week is about making all of the time and energy you have spent with a student count!”

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The 12 Steps of the Lock-In Process

1. Effective interview with campus tour
2. DOA meeting
3. Handwritten congratulatory card
4. 24 hour congratulatory call
5. Conditional Acceptance Letter
6. Financial Aid packaging

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The 12 Steps of the Lock-In Process

7. Accountability meetings
8. Lock-in letter series
9. Representative contact
10. Lock in Events
11. New Student Orientation
12. Start Week

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Recap

You should now be able to:

- Recognize the purpose of the lock-in process
- Identify the 12 steps of the lock in process
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On behalf of the National Admissions Team, thank you for completing the Making It Count: The 12 Step Lock-In Process training. We hope you find this training helpful and we wish you much success!

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The Lock-in Process is designed to help representatives:

- A) Increase the number of enrollments
- B) Decrease the number of meetings between a representative and DOA
- C) Improve the appointment to interview conversion
- D) Increase the number of students who start and complete their program



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Complete the sentence below by filling in the blanks.

The step in the process when representatives consistently maintain contact with students by calling them in order to explore a commitment and excitement about starting school, generate referrals, and _____ address concerns is called what?

address



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Which activity is not the responsibility of an admissions representative during Step 6, financial aid packaging?

- A) Greet students before and after their financial aid appointments.
- B) Call students to remind them of financial aid appointments.
- C) Encourage students to submit Proof of Graduation.
- D) Help students complete financial aid paperwork if they need help.



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Representative contact should be completed:

- A) Once before the start
- B) For every student who does not show up for financial aid appointments
- C) On a regular basis for all enrolled students until the first day of class
- D) Only for students who enroll at least 6 weeks before start day



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Match each step of lock-in with its purpose

Lock-In Step

- Lock-In Events
- Financial Aid Packaging
- 24 Hour Congratulatory Card
- Start Week
- Representative Contact
- New Student Orientation

Purpose

- A. Help students transition into school
- B. Making the time and energy you spent with students count
- C. Relieve worry of financial responsibilities
- D. Weekly follow up with enrolled students to check their temperature about school
- E. Provide positive reinforcement
- F. Build confidence of students by inviting them to campus events



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Complete the sentence below by filling in the blanks.

Effective use of the lock-in process decreases the likelihood of students changing their mind about starting school 24-48 hours after making the decision to enroll, which is called



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On the 4th day of the first week of class, Donovan approaches you to tell you he wants to withdraw from classes. He wants to go on a cruise next month and his teacher says he will not be able to pass the class if he misses a week of school. He thinks it may be a better idea to enroll at the local community college. What should you do?

A) Tell Donovan you cannot believe he is going to give up on himself again. Tell him a vacation is not as important as his future and walk him back to class.

B) Sit down with Donovan and address his concerns by asking him questions and identifying resources to help him. Develop a plan with Donovan to help him stay in school.

C) Tell Donovan he will not get the personalized attention he needs at a community college because the classes are too large and there is little hands-on training.

D) Go to Donovan's instructor and explain the situation to see if you can work something out.

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The 12 Step Lock-In Process

Your Score	Score
Max Score	{max-score}
Accuracy	{percent}
Number of Quiz Attempts	{total-attempts}

Question Feedback/Review Information Will
Appear Here



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