The 10 Emails You Should be Automating!

Copyright © 2017

Let’s Automate!

As you may know if you’ve ever read anything we’ve ever written, we’re quite found of our automated communications feature! Not only will it save you loads of time, as you don’t have to send hundreds of individual emails, at various different times, on different subjects, but it also ensures that no email is ever left behind. Automated communications mean that once they are set up, they will be triggered every time a certain event happens, for example a new students signs up to a course, so you never have to worry about someone forgetting to send a vital email again.

You also never need to worry about things like errors once you’ve got it all set up. You can use the same specific templates for certain situations over and over again, with all the specific students and event date populated from your contacts so everything is guaranteed to be correct. It also means you’ll never mistype an email address again, so mail won’t end up in some random inbox or just end up bouncing back to you. Sounds perfect right?

We’ve picked the top 10 emails we think you need to automate with Administrate in order to make the most of your time and help deal with the dreaded admin!

1. Booking Confirmation

Imagine purchasing something online, but having to wait for a staff member from the company you shopped with to actually be in the office to email you back and confirm your booking? Chances are if you haven't received an email within about 10 or 15 minutes you would be worrying that your purchase hadn't gone through, and you won't know unless you can get in touch with someone, but if people aren't emailing you, they probably won't be there to pick up the phone either!

If your office is only open Monday to Friday, 9-5, then if someone books on to a course with you at 6pm on a Friday, they'll have to wait until 9am Monday to get a booking confirmation! That's hardly ideal.

The last thing you want is to have your student panicking, thinking their purchase hasn't gone through, or maybe even trying to complete the sale multiple times to see if it's working! That's ensuring you've created a bad relationship with your customer right from the start, and you may be creating lots of extra work for yourself if you come into an inbox full of stressed out emails!

Set up a trigger so that whenever anyone books on to a course with you, they automatically get an email thanking them for booking with you, and saying further details will be sent across shortly. That way all your students know instantly that their place is secure and they can relax.

You can also set it up so that if you manually book a student on to a course, such as a customer who has phoned up to book with you, the minute they are entered into Administrate as being part of that class, they will also receive the email, so you don't even have to worry about following up with them once you've completed the sale!

2. Invoices

Similar to booking confirmations, it's important for customers to know that they have actually paid for their class, and the payment has been successful. Customers will also want a copy of an invoice for their records, so it's important to send that across to them as well.

Alternatively, you can use the automated communications feature to send emails to people who have not paid yet, including their invoice so they know exactly how much they have to pay. You can set this up to send a certain amount of time before the class begins, say 3 weeks, so they have plenty of time to get the payment across to you and confirmed. Of course, once they've paid they'll receive the automatic email with their payment confirmation details, so everyone stays organised!

3. New Class Set Up

When you're entering all your class details into Administrate, you'll have to select things like the room it will be in, whether the class needs any additional resources, and who the tutor would be. Rather than having to remember to send all the tutors a list of all their classes, when they are all running, and where they will be running, use automated emails!

Set up a trigger than will automatically send to the assigned teacher of each class once you have entered the event in Administrate and selected them as the teacher, and that way they will always have a complete record of all the classes they are teaching, so they can organise themselves accordingly.

This is also a handy email to send to your Sales team or Training Administrators so they are always aware of all the classes you have as part of your training offering.

4. New Sign-Ups

Similar to the email above, it's important for you tutors to know when students are signing up for their course, so they can know how many to expect when they turn up for a class. This may affect how they are going to teach the course – for example if they know there are only going to be 10 attendees instead of the maximum amount of 20, they may decide to run some group work activities which wouldn't work well with a large number of students.

It also means there won't be any confusion as to how many students will be turning up for the class, as if there are only half the allocated amount of spaces filled, the teacher may assume there are students missing and delay the start of the class, when really those spaces just weren't sold.

Again, there may be other members of staff who would like to receive this information, such as the Training Administrators who are booking things like resources. While you can obviously view the amount of students attending a particular event on the events screen within Administrate, emails can be a handy reminder of how many people have signed up, especially if someone signs up at the last minute, such as the day before. The email coming into the Training Administrator's inbox would prompt them to make sure they have the right amount of catering and class resources, such as textbooks, to cover this last minute student, so it's a great feature to utilise.

5. Class Information

After you've sent a booking conformation to your students, you'll probably want to send them some information on their specific class. This could include details like exactly where the event will be taking place, such as the building and actual room number, the times of the classes, whether food will be provided, what books or supplies they will need to buy and bring to the class, etc.

You can use communications templates within Administrate to make a template for each course, so the class information is always up-to-date and correct for that specific class. You can also set up the information to send a set amount of time before the class starts, to make sure you give them enough time to make travel arrangements, purchase any supplies they need, and read any materials they need to be up-to-speed on before the class starts.

6. Class Reminders

Class reminders are emails that you might send out before certain classes to remind students of specific things. This could be things like the third class in a specific block is going to be in a different venue for that one week only, a reminder that an assessment will be taking place in class this week, or a reminder to bring a specific book with you to class as the class will be based around it.

Things like assessments, or a specific class in the schedule being at a different venue will be things you decide ahead of time, and will know exactly when they are going to fall, so they'll be really easy to template and set up to send at specific weeks during the course. This means you don't have to remember to send loads of follow-up emails to your students, and your students will always be up-to-date with any vital information that they need.

7. End of Class Surveys

When your class comes to an end it's a great opportunity to survey your students to see what they thought of their experience and of you as a company. You will more than likely have a survey already set up that you will use for all your classes, or at least a couple of set surveys if you want to split up the different types of classes you teach, which you can have pre-loaded into Administrate, all ready to go.

You can then set when you want them to be sent to students, such as a week after the class has finished, and all your students will be sent the survey automatically. It means you never need to worry about forgetting to send a survey to a particular class, and missing out on lots of valuable data you could use in your training measurement.

8. Remember to Re-Enrol

If you offer qualifications that need to be re-taken after a certain time period, it's a great idea to make sure you email all the students with that qualification a couple of months before it is due to expire.

Not only is this a handy reminder to the student that they need to attend training again if they wish to remain qualified, but it means they will be more likely to re-purchase the class from you! They may have trouble remembering who they took the qualification with the first time, depending on how long ago it was, or may simply head to Google and use the first provider they find, but a handy reminder email ensures you're at the front of their mind when they decide to purchase their training.

Automated communications are particularly good for this feature, as it could be years down the line when you need to contact the students again, which could easily be forgotten in favour of more urgent tasks. Simply set up a trigger for a couple of months before the qualification expires, and then you don't need to worry about it until those students start getting back in touch again!

9. Reports

Our reporting engine is one of our favourite features! Once you have all your data loaded into Administrate, reporting on it is a total breeze and takes seconds!

But what if you have to produce the same report every month, and then email it to certain people in your company? No problem!

Administrate reports allow you to report in real-time, as the data is always updated with any changes in Administrate. You can then set up a communication trigger to email a specific set of people, at a specific time (such as the first of the month), with that report. That means every first of the month, all the relevant people will have a report, with the most updated data, straight in their inbox. That means no extra effort for you, and the people who need it always have the information they need right in front of them.

10. Daily Tasks

Do you ever wish you could just get a list of all the things you need to do when you get to work written out for you every day? If you came into the office in the morning and were greeted with a pre-made to-do list, imagine how productive you could be?

Administrate can do just that for you! Your upcoming tasks are always displayed on your homepage within Administrate, so you can login and check your tasks at any time, but Administrate will also email you a list of your daily tasks every morning so you never forget those important to-dos and when they are due!

This means you can be confident that anyone on your team who uses Administrate will also receive a list of their tasks, so you don't need to worry about checking up with them to make sure they know what they are doing, or sending our manual task lists yourself. That's even more time saved!

Interested in Saving Time?

Making the move to Administrate, and automating lots of your communications, will save you so much time, think of all the amazing things your business can do with those extra hours?

If you're interested in finding out more, why not book a demo with one of our team?

UK: +44 131 460 7350

USA: +1 (406) 322 3312

MENA: +961 71 419 404

info@getadministrate.com

http://www.getadministrate.com