Managing Your Pipeline in iTutorOS

A practical playbook for keeping leads moving from inquiry to enrollment.

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> **Audience:** Independent tutors and small tutoring organizations using iTutorOS.
> **Goal:** Practical steps, checklists, and templates you can use immediately.

Note: iTutorOS is designed for K-12 tutoring businesses and small tutoring organizations. If your workflow differs (e.g., test prep, adult education, group classes), adapt the stages and scripts to match your service model.

Contents

- Pipeline fundamentals (what to track on every lead)
- Recommended stage model for tutoring sales
- Daily and weekly operating cadence
- Scheduling and handoffs (multi-location and tutor assignment)
- Follow-up templates (email, text, call)
- Metrics to review every week

Pipeline fundamentals

A pipeline is a simple promise: every inquiry gets a fast response, a clear next step, and a recorded outcome. In iTutorOS, treat each **Lead** as a living record that always has three things kept current:

- **Stage** - where the lead is in your sales process.
- **Next action** - what you will do next (call, text, send plan, schedule trial) and **when**.
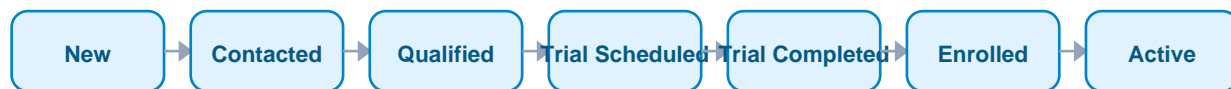- **Notes** - what matters: goals, constraints, objections, and decision criteria.

If you keep only those three fields accurate, your pipeline stays healthy even when you are busy teaching.

> **Rule of thumb:** if a lead has no next action date, it is not being worked.

Recommended stage model for tutoring sales

You can customize stage names, but avoid over-complication. The goal is clarity and consistent handoffs.

Simple end-to-end flow:

New → Contacted → Qualified → Trial Scheduled → Trial Completed → Enrolled → Active

Stage definitions

Keep stage meanings stable. If two people could interpret a stage differently, write down the exit criteria.

Stage	Entry criteria	Required actions	Exit criteria (move forward when...)
New	Inquiry received.	Confirm location + service; assign an owner; respond within minutes.	You attempted contact and set a next action.
Contacted	You sent first message or called.	Schedule a discovery call; capture parent and student basics.	You have enough info to qualify (go/no-go).
Qualified	Need is real and you can help.	Recommend a plan; offer trial lesson; confirm decision maker + budget range.	Trial lesson is booked (date/time confirmed).
Trial Scheduled	Trial is on calendar.	Send prep + expectations; confirm materials; reminder 24h before.	Trial completed and feedback captured.

Stage	Entry criteria	Required actions	Exit criteria (move forward when...)
Trial Completed	Student seen at least once.	Share diagnostic + plan; present package; ask for enrollment.	Parent agrees to a package or subscription.
Enrolled	Paid/committed for ongoing sessions.	Set recurring schedule; agree on policies; define success metric.	Student is actively receiving sessions.
Active	Recurring or scheduled sessions underway.	Monitor progress; request review/referral at milestone.	Close as 'Won' (retained) or 'Lost' (churn).

Add a **Lost** outcome at any stage with a reason (price, schedule, not a fit, no response). This is critical for improving lead quality and messaging over time.

Daily and weekly operating cadence

The biggest driver of tutoring revenue is speed-to-lead. Parents often contact 3-5 tutors. Your goal is to be the fastest, clearest, and most helpful.

Daily checklist (15 minutes total)

- **Triage new leads**: respond, set stage to Contacted, and set a next action.
- **Work today's follow-ups**: call/text the oldest 'Qualified' leads first.
- **Confirm upcoming trials**: send reminders and any prep materials.
- **Update notes** after every interaction (2-3 bullet points).

Weekly review (30 minutes)

- Count leads created by source and by location.
- Check conversion rates: New->Contacted, Contacted->Qualified, Qualified->Trial Scheduled, Trial Completed->Enrolled.
- List stalled leads (no activity in 7 days) and run a re-engagement sequence.
- Audit availability: ensure you can actually schedule the times you advertise.

Healthy pipelines are boring: small actions, daily, done consistently.

Scheduling and handoffs

In iTutorOS, scheduling revolves around the relationship between **Location**, **Service Offered**, **Tutor**, and **Schedule Entry**. For multi-location organizations, treat the location as the first routing decision.

Routing rules

- Assign every lead to exactly one **Location** (even if you operate virtually).
- Only assign a **Tutor** who is associated with that location.
- Select the correct **Service Offered** (e.g., 1-on-1 60 minutes, Test Prep 90 minutes).
- When booking a trial, create a **Schedule Entry** that includes duration, buffer, capacity, and room (if applicable).

> If you see scheduling errors like "tutor is not associated with location", it usually means the tutor-location relationship was not set up yet. Fix the association first, then schedule.

Clean handoff from sales to delivery

- After enrollment, capture 3 essentials in the lead or student notes: **goal**, **baseline**, **success metric**.
- Confirm parent communication preference (text/email) and best contact times.
- Set expectations: homework, session cadence, and when progress updates happen.

Follow-up templates

These templates are designed for busy tutors. Keep them short, specific, and action-oriented. Personalize one line (child name + goal) to stand out.

Template A - first reply (text or email)

Subject (email): Quick next step for {StudentName}

Hi {ParentName} - thanks for reaching out. I can help {StudentName} with {Goal}. What times generally work this week: weekday afternoons, evenings, or weekend mornings? If you prefer, we can do a 10-minute call first. - {YourName}

Template B - discovery call confirm

Confirmed for {Day} at {Time}. We will cover: goals, current level, schedule, and a recommended plan. If you have recent tests/homework, bring one example. - {YourName}

Template C - no response follow-up

Hi {ParentName} - quick check-in. Do you still want help for {StudentName} with {Goal}? If so, send two times that work and I will lock it in.

Template D - post-trial close

Today I noticed {1-2 observations}. My recommendation is {Plan}. If you want to start this week, I have {two options} open. Should I reserve one for you?

Metrics to review every week

You do not need complex analytics. Track a few leading indicators and take action fast.

- **Speed-to-lead**: median minutes from inquiry to first response.
- **Qualification rate**: % of contacted leads that become Qualified.
- **Trial booking rate**: % of qualified leads that schedule a trial.
- **Close rate**: % of trial-completed leads that enroll.
- **Time-to-close**: days from first contact to enrollment.
- **Loss reasons**: top 3 reasons (price, schedule, fit).

When one number dips, fix the step before it. Example: if close rate drops, improve your trial lesson and post-trial recommendation.