

## How to use this planner

Work through each pipeline stage and document the communication your school sends at that point — or should send. Use the Notes column to record who owns each communication, any draft link or template name, and the last date it was reviewed. Review and update this planner before every admissions season opens.

**Tip from the OpenApply team:** Every communication in this planner should be reviewed annually. Outdated fees, wrong contacts, and expired dates in automated emails are among the most common issues we see at the start of admissions season.

## Part 1 — Pipeline Communication Map

Complete the table below for each stage of your admissions pipeline. Add or remove rows to match your school's pipeline.

Pipeline Stage	Communication	Timing	Channel	Owner / Notes
Enquiry received	Enquiry acknowledgement	Within 24 hours	Email / OpenApply	
Enquiry received	School information pack	Same day	Email attachment	
Application started	Application started reminder	3 days if incomplete	OpenApply auto	
Application submitted	Submission confirmation	Immediate	OpenApply auto	
Documents requested	Document checklist email	Within 2 days	OpenApply / email	
Documents outstanding	Document reminder	5 days before deadline	OpenApply auto	
Assessment stage	Assessment invitation	On stage move	OpenApply auto	
Assessment stage	Assessment confirmation	On booking	Email	
Assessment stage	Assessment reminder	48 hours before	Email	
Decision pending	Timeline update	If >2 weeks	Email	
Offer made	Offer letter	On decision	OpenApply auto	
Offer made	Enrolment pack	With offer or on acceptance	Email / portal	
Offer accepted	Acceptance confirmation	On receipt	OpenApply auto	
Offer accepted	Next steps / welcome	Within 3 days	Email	
Offer accepted	ManageBac+ / platform setup	Before first day	Email	
Waitlisted	Waitlist notification	On decision	OpenApply auto	
Waitlisted	Waitlist status update	Monthly or on change	Email	
Declined	Decline notification	On decision	OpenApply auto	
Withdrawn	Withdrawal acknowledgement	On request	Email	

## Part 2 — Communication Review Checklist

Complete before every admissions season opens.

Task	Done	Reviewed by
All automated email templates reviewed for outdated fees, dates, or contact names	<input type="checkbox"/>	
Reply-to address on all automated emails is monitored regularly	<input type="checkbox"/>	
Test email sent for each automated trigger to confirm it fires correctly	<input type="checkbox"/>	
Offer letter template updated with current year tuition and intake dates	<input type="checkbox"/>	
Enrolment pack content confirmed as current	<input type="checkbox"/>	
Document checklist reflects current requirements for each entry point	<input type="checkbox"/>	
Assessment invitation includes correct venue, format, and contact details	<input type="checkbox"/>	

All email templates reviewed on a mobile device for formatting

Communication ownership confirmed with admissions team for the season

Planner reviewed and signed off by Admissions Director

### Part 3 — Communication Ownership Register

<b>Enquiry response owner</b>	Who responds to new enquiries within 24 hours?
<b>Automated email owner</b>	Who reviews and updates OpenApply email templates?
<b>Offer letter owner</b>	Who drafts and approves offer letters?
<b>Enrolment pack owner</b>	Who maintains the enrolment pack content?
<b>Waitlist communications</b>	Who manages waitlist updates to families?
<b>Season sign-off</b>	Who confirms comms are ready before season opens?
<b>Last full review date</b>	
<b>Next review due</b>	

**FariaSupport reminder:** If you are unsure how to update an automated email template in OpenApply, contact the OpenApply Support Desk. We can walk you through template editing and trigger configuration.