Elevating Child Care Efficiency

The impact of integrating CCMS and CRM Solutions

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Agenda

Introductions

Opening Question

Digging into each key topic

Closing Remarks

Opening Question

Think about your daily operations and interactions with parents and children. What is one administrative task you find most time-consuming or challenging, and how do you think technology could help alleviate that burden?

- Time-consuming tasks: attendance tracking, billing, scheduling
- Challenging interactions: parent communication, incident reporting
- Potential technological solutions: mobile apps, automated systems

🔑 Key Topics

- Defining CRM & CCMS
- Digging into CCMS & Examples from the field
  - Maximizing Operational Efficiency
  - Enhancing Parent Engagement
  - Data-Driven Decision Making
- Seamlessly Integrating Technologies
- Digging into CRM
  - Examples from the field & Case Studies
- Closing Remarks

Defining CCMS & CRM

Child Care Management System (CCMS)

A Child Care Management System (CCMS) is a specialized software designed to streamline and automate various administrative and operational tasks within child care centers and early childhood education programs.

Key features often include:

1. Enrollment Management
2. Billing and Invoicing
3. Attendance Tracking
4. Parent Communication
5. Staff Management
6. Lesson Planning and Curriculum Management
7. Regulatory Compliance
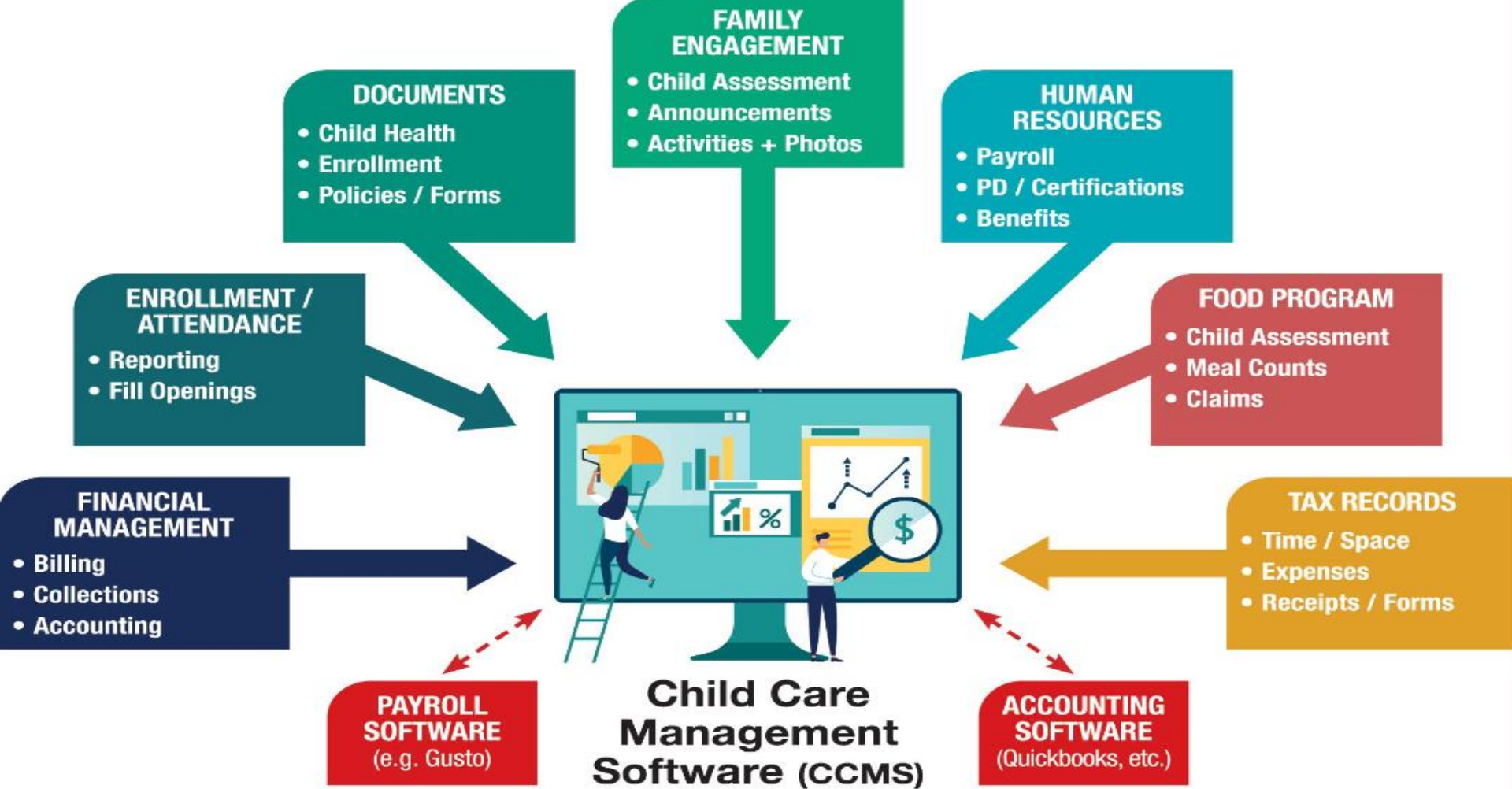
A Customer Relationship Management (CRM)

A (CRM) is a Customer Relationship Management system that centralizes your organizational operations and houses your data.

A CRM can help keep track and manage providers or clients information, allows you to store documents, create forms, and allows for customizations based on your organizational needs. A CRM supports your data collection processes and creates automated workflows used to manage the day to day tasks. Additionally, a CRM allows for impactful data analysis and reporting, sometimes done through data dashboards and custom reporting.

Lastly, some CRMs integrate with third party apps so that you are able to work within one platform instead of multiple platforms with separate logins.

Diving into CCMS

FAMILY ENGAGEMENT
- Child Assessment
- Announcements
- Activities + Photos

DOCUMENTS
- Child Health
- Enrollment
- Policies / Forms

HUMAN RESOURCES
- Payroll
- PD / Certifications
- Benefits

ENROLLMENT / ATTENDANCE
- Reporting
- Fill Openings

FOOD PROGRAM
- Child Assessment
- Meal Counts
- Claims

FINANCIAL MANAGEMENT
- Billing
- Collections
- Accounting

TAX RECORDS
- Time / Space
- Expenses
- Receipts / Forms

Child Care Management Software (CCMS)

PAYROLL SOFTWARE
(e.g. Gusto)

ACCOUNTING SOFTWARE
(Quickbooks, etc.)

Importance of Efficiency in Child Care Operations

Automation of Administrative Tasks:

Automating enrollment and billing processes significantly improves efficiency. The use of digital attendance systems streamlines daily operations, allowing staff to focus more time and resources focused on children.

Reducing Paperwork:

Transitioning to digital forms and records greatly reduces paperwork. The benefits of cloud storage include easier access, better organization, and enhanced security of important documents.

Optimizing Scheduling:

Automated scheduling tools provide flexibility for both staff and parents. This optimization ensures smoother operations and better time management in child care facilities.

Examples from the field

- Faith-based program.
- CCMS limited use
- Administrative tasks on paper and spreadsheets
- Banking task
- Time savings 5-10 weekly

Enhancing Parent Engagement

Improved Communication

Use of apps and platforms for real-time updates & Automated reminders and notifications. By leveraging modern technology, child care centers can significantly enhance their communication with parents, providing timely updates and important information efficiently.

Tracking Interactions

Digital logs of parent-teacher meetings & Personalized communication based on child's progress. Maintaining detailed digital records of interactions allows for more personalized and effective communication, ensuring that each parent receives relevant information about their child's development.

Personalized Approach

Tailored updates and reports for parents & Customizable communication preferences. By offering customizable options and tailored content, child care centers can cater to individual parent needs, fostering stronger relationships and increased engagement.

Examples from the field

- Large for profit program serving 150 children
- Communication challenges
- CCMS communication improvements
- Parent engagement and satisfaction

Data-Driven Decision Making

Data Analytics
Tools for collecting and analyzing data & Monitoring enrollment trends and patterns.

- **Dashboards**: Provide real-time insights into key performance indicators (KPIs).
- **Reporting Tools**: Generate detailed reports on various aspects of program operations.
- **Integration with Other Software**: Sync with financial systems, CRM tools, and educational apps for a comprehensive data view.

Evaluating Program Effectiveness
Tracking child development milestones & Assessing staff performance.

- **Historical Data Analysis**: Examine past enrollment data to identify trends.
- **Predictive Analytics**: some CCMS have forecasting for future enrollment.
- **Visualizations**: Dashboards can provide graphs and charts to illustrate trends over time.

Informed Decisions
Using data to adjust curriculum and staffing & Enhancing resource allocation.

- **Tracking child outcomes:** Adjust the curriculum based on developmental progress and learning outcomes.
- **Staff professional development tracking:** Monitor ongoing training and professional growth

Examples from the field

- Montessori program
- Struggles with collection tuition
- $6500 past due balances carried monthly
- CCMS implementation and reduction in past due balances

Seamlessly Integrating Technologies

Best Practices:

- Steps for a successful technology integration.
- Training and support for staff.

CCMS and CRM Integration:

- Benefits of integrated Child Care Management Systems (CCMS) and Customer Relationship Management (CRM) systems.
- Examples of effective integrations.

Minimizing Disruption:

- Planning for a smooth transition.
- Ensuring continuity of services.

Diving into CRM

Organizations and Shared Service Alliances can use a CRM for a variety of tasks, such as:

Service Participation
- ○ allow provider access to CRM to complete grant applications
- ○ allow provider access to CRM to complete program participation applications
- ○ track and report on grant/application volume, status, etc.

Provider Documentation
- ○ track provider demographics (program type, quality rating, location, multi- or single-site, etc)
- ○ import and refresh relevant provider data from other sources
- ○ track provider status of engagement in the program (active, waitlisted, disenrolled)

Service Documentation
- ○ track provider contacts (type of contact, length of contact, topics covered, etc)
- ○ track provider participation in webinars

Program Impact Documentation
- ○ collect baseline data on key business metrics
- ○ collect comparison data on key business metrics
- ○ compare individual- and aggregate-level data on key metrics

Examples from the field

Our program has spent the last 5 years collecting data the way a lot of programs do, through spreadsheets and adobe forms. For the last four years we have been working to integrate the data from the CCMS vendors we connect with to our own data collection platform. We have also worked with CCMS vendors to create data dashboards to assist with reading business metrics for improved practices.

We are now in the process of moving the data we receive in the CCMS into our Dynamics CRM for program management and data analysis. In addition, we have begun conversations with vendors for API integration of data when possible. Our program is modeling for our participants how using technology can improve program processes and increase confidence in decision making.

- Arizona CCES story
- Traditional subsidy billing process
- CCES pilot
- Progress
- Benefits

- For-profit multi-center program
- Bookkeeper old friend of owner
- Owner joined our shared service alliance receiving:
  - Accounting
  - Bookkeeping
  - QuickBooks
  - Gusto payroll
  - CCMS with subsidy API
- Program work discovered discrepancies and questionable practices

CASE STUDY

Lessons Learned

- Key takeaways from the success stories.
- How these can be applied to other programs.

Closing Remarks

- Recap
- Final Thoughts
- Q&A

Thank you!!

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