Legacy Traditional Schools

Admin, DSO, & Principal

Role-Based Training

Prepared for Legacy Traditional Schools
by HIVE Strategy

Background and Overview

This document is a companion to the LTS Admin, DSO & Principal training course from HIVE Strategy. It covers how admins, DSOs, and principals will document, manage, and resolve guardian inquiries within HubSpot.

BEFORE YOU BEGIN

This training walks through the full inquiry resolution process, from claiming an unassigned ticket to closing it out. Throughout this training, Doug Parker (guardian) and Debbie Parker (student) are used as fictional examples.

The HIVE team is available if you have questions beyond this guide.

Training Modules at a Glance

#	Module
1	Why We're Changing the Inquiry Process
2	How the Inquiry Process Works
3	Help Desk Overview
4	Your Day to Day
5	Claiming Your Tickets
6	Responding to Your Tickets
7	Closing Your Tickets
8	Cheat Sheet, Support, and Resources

MODULE 1 | **Why We're Changing the Inquiry Process**

Why Are We Changing the Inquiry Resolution Process?

OUR ULTIMATE GOAL

Every change we're making rolls up to one goal: **To better support families and make your life easier.**

This new system and process exists to give you the tools, information, and context you need to support the guardians and families you interact with every day.

Here is how this system will allow us to reach that goal:

One place for context

The system gives you **one spot** to see every note or question you need to be aware of, and one spot to find the context you need to respond to and resolve it. That means less time searching for information, and guardians won't have to repeat the same information to several different team members.

Nothing falls through the cracks

The system **clearly** shows which questions have been addressed and which still need follow-up, so we know every guardian gets an answer without relying on sticky notes or email threads.

Understanding trends

Logging every question, even ones you answer immediately, helps us see common questions guardians are asking. Over time, that data can point to opportunities to give guardians a way to find answers on their own, **saving your time for the questions that really need your attention**. For example, if guardian after guardian asks about the same campus event, we can consider creating a resource so your team isn't answering the same question over and over.

Visibility into communication

If a guardian comes to you frustrated, saying a question was never answered, you'll have documentation showing exactly when and how it was addressed, helping avoid **"he said, she said" situations.**

MODULE 2 | **How to Inquiry Process Works**

High-Level Process Flow

At a high level, every inquiry is managed, recorded, and logged in HubSpot as a ticket, **a digital record of the guardian's question.**

Tickets can be created in two ways:

1. Emails

An email to your campus's primary inbox automatically creates a ticket. If the question relates to attendance, a withdrawal request, or a new enrollment request, it will automatically be assigned to you.

2. Phone calls, voicemails, and in-person questions

When a guardian calls, leaves a voicemail, or stops by in person, the secretary fills out a short form — the Family Support Card — on the guardian's record. Submitting that form creates a ticket, which routes the same way an email would.

KEY CONCEPT: WHAT IS A TICKET?

A ticket is the **digital sticky note** for a guardian's question. It's created either automatically (from an email) or by a secretary (via the Family Support form), and it's saved in HubSpot so questions never fall through the cracks.

Once a Ticket Exists:

1. It's sent to the appropriate team member — either the registrar, a secretary, or an DSO/admin — depending on the category of the question.
2. Once a ticket is escalated or within one of the categories your team owns, it will live in your team's unassigned queue until an available team member picks it up.
3. You'll respond to and resolve the ticket entirely within HubSpot's Help Desk, where you can see historical notes, other team members' notes, and all related emails.
4. Once you close the ticket, the question is resolved and we know the guardian's question has been fully answered.

MODULE 2 | **How to Inquiry Process Works**

Four Ways Tickets are Sent to Your Team

There are a few situations in which a ticket will be sent to the admin, DSO, or principal team:

1. **Category match**: the ticket is categorized as Academic Concern, Behavior or Discipline, Request to Speak to an Admin, or Complaints/Concerns.
2. **Escalated mid-conversation**: a secretary or registrar is working a ticket and determines the conversation needs to be brought to an admin, DSO, or principal.
3. **Escalated on intake**: a guardian calls, emails, or stops by, and the secretary determines the issue needs to be escalated immediately, regardless of category.
4. **SLA time period passes**: if the assigned secretary or registrar doesn't respond within the expected timeframe, the ticket automatically escalates to your team.

IMPORTANT

Unlike secretary and registrar ticket routing, tickets in your categories and any escalated tickets **will not have an owner by default**. Rather than sitting in one person's queue until they're free, these tickets live in a shared queue so the soonest available admin, DSO, or principal can pick them up and get the guardian an answer more quickly.

You are responsible for regularly checking your Help Desk and assigning yourself any tickets you're available to take.

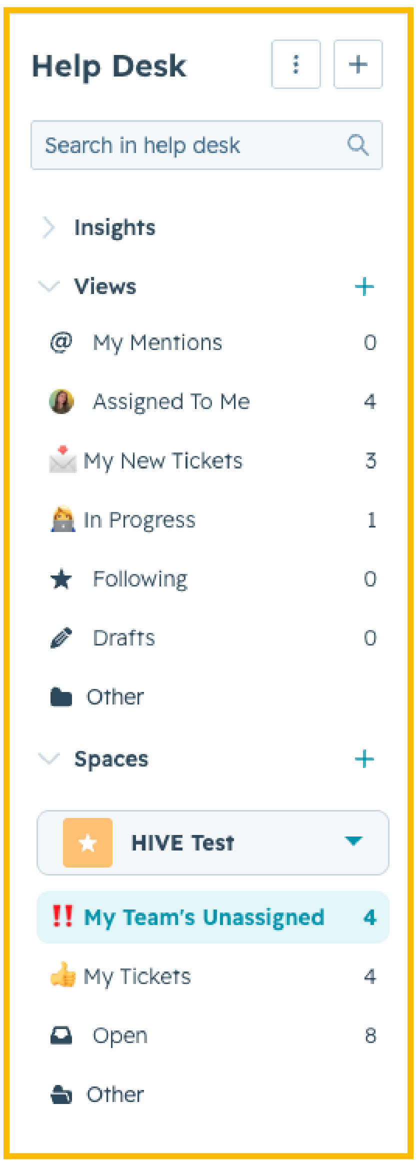
MODULE 4 | **Help Desk Overview**

Ticket and Help Desk Overview

This module will walk you through the help desk and provide an overview of important terminology.

Ticket Views

Views are how tickets are sorted, and meant to help you quickly find tickets you need to be aware of.



Note:

Your team will primarily use the custom views, showing underneath the **Spaces** drop down and your campus.

Important Views

My Team's Unassigned: Always start your day in this view. This will show you any new tickets that need to be addressed.

My Tickets: These are tickets that you have picked up and are responsible for responding to and resolving.

Honorable Mentions

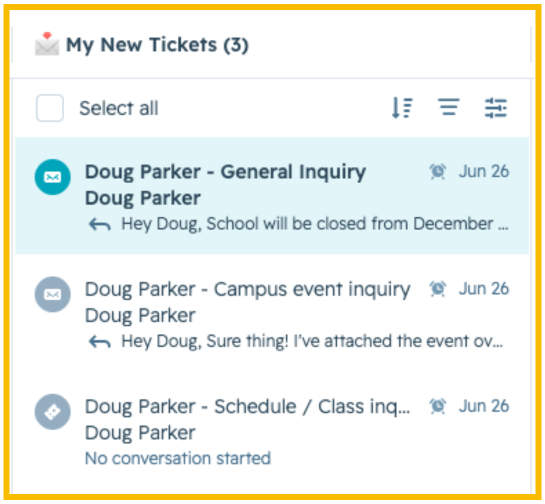
My Mentions: Will show you any ticket where another team member has tagged you in an internal note, regardless of who owns the ticket.

Following: Will show tickets that you have chosen to follow.

Drafts: Will show any ticket where you started to draft an email but have not sent it yet.

Your Inbox

Your inbox shows a preview of the tickets within the view you've selected



Clock Icon

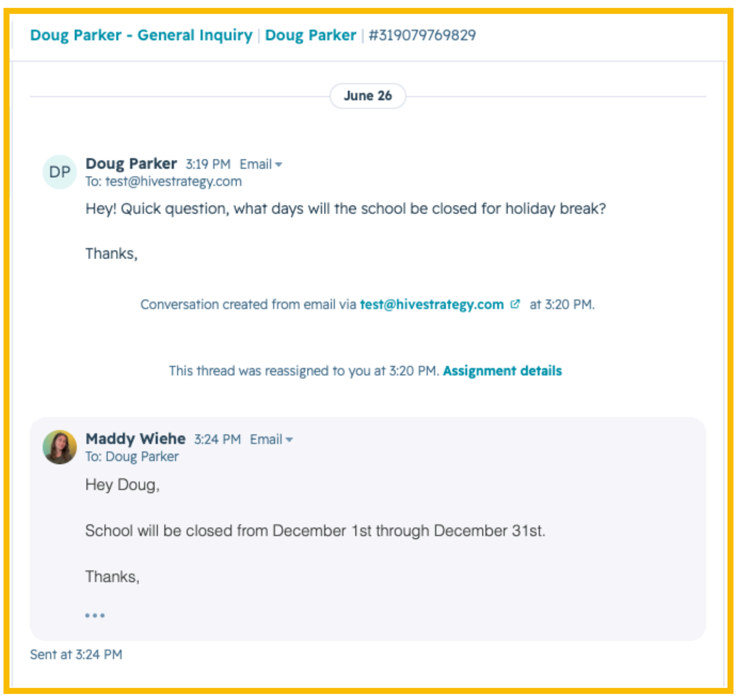
The clock icon indicates how soon a response is required to hit our SLA goals:

- Grey: A response is due in more than an hour
- Yellow: A response is due in less than an hour
- Red: A response is overdue

Tickets with a red clock icon should be worked first, then yellow, and then move into the grey.

Center Column

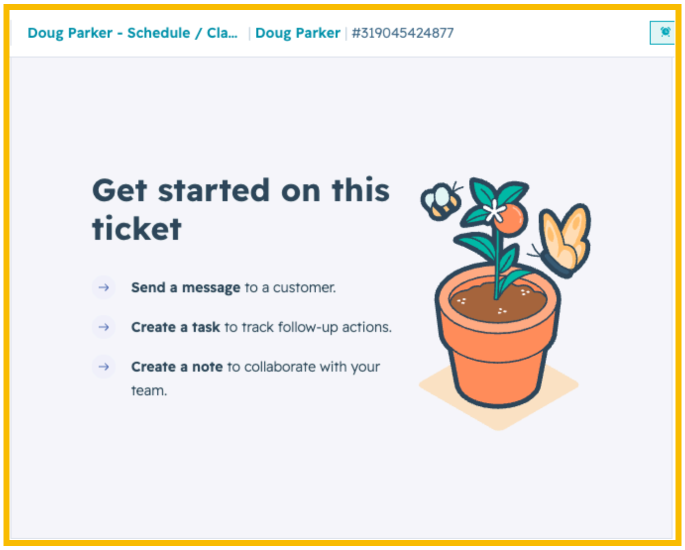
The center column shows the history of communication, including external emails and internal notes.



Email Tickets

For tickets created via email, the original email from the guardian will show as the first item in the center column.

Any subsequent emails, ticket updates, or internal notes will show in sequential order.



Phone or In Person Tickets

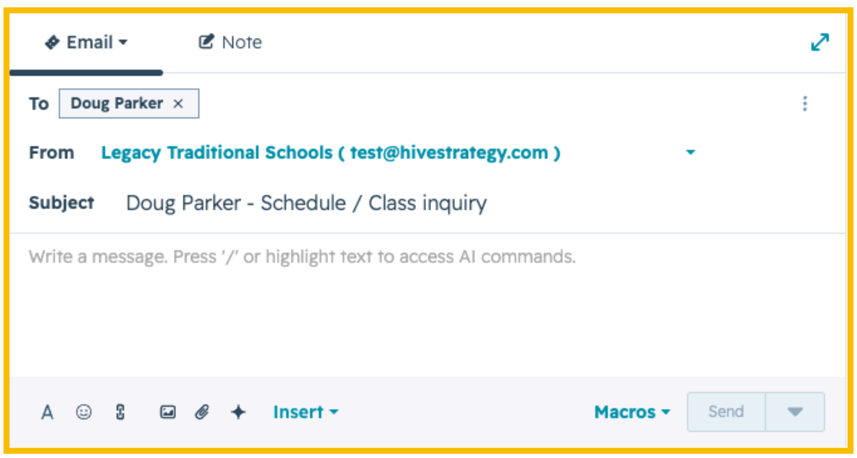
For tickets created through the family support card, the center column will initially be blank.

However, the ticket description can always be found on the right hand side.

Any subsequent emails, ticket updates, or internal notes will show in sequential order.

Response Box

The response box below the center column allows you to send emails to the guardian and log internal notes, which are not visible to the guardian.

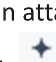


Sending Emails

Clicking  allows you to format text.

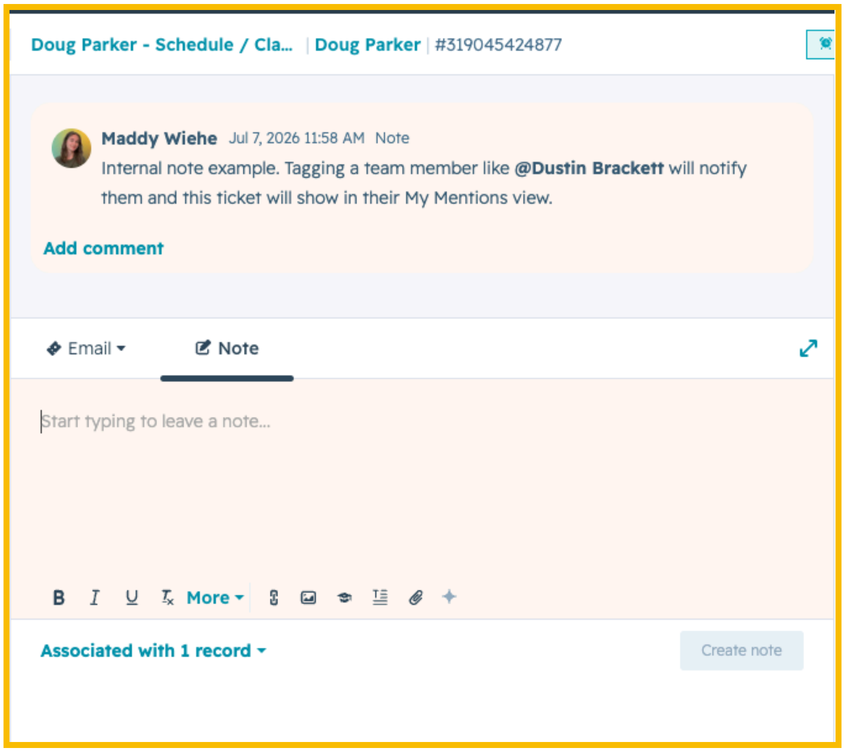
Clicking  allows you to insert a link.

Clicking  allows you to insert an attachment.

Clicking  allows you to use HubSpot's AI tools.

The  button allows you to insert snippets, pre-set blocks of copy used to answer common questions.

And the button will send the email to the guardian.



Leaving Notes

The Note tab in the response box will allow you to create an internal note.

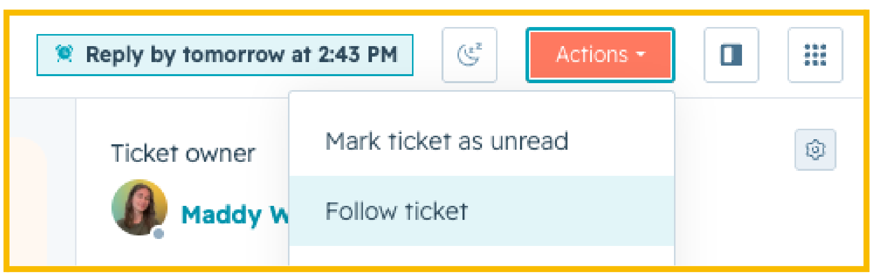
If you type @ and a team member's name, they will be notified and the ticket will show in their My Mentions view.

This note is **not** visible to guardians, only internally.

IMPORTANT: Always leave a note if you discuss something over the phone or in person, so the record of communication stays complete.

Right Hand Column

The right hand column will show all the contextual information you need around the inquiry.

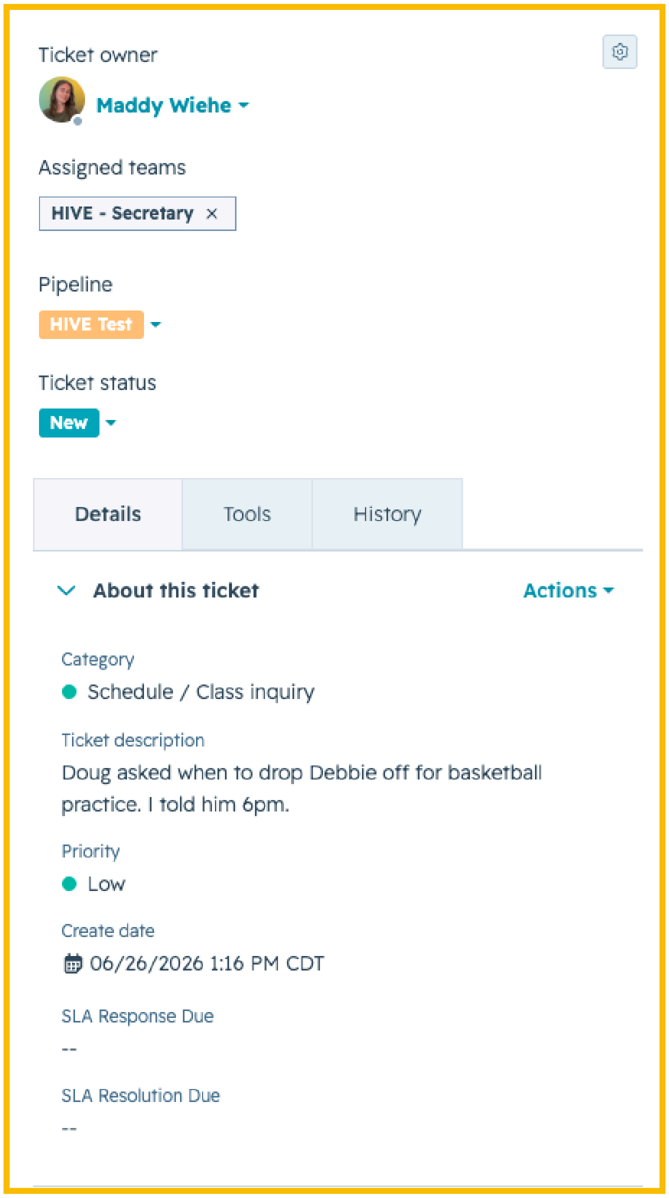


SLA Time

The highlighted text will show you when a response is due.

Following a Ticket

If you select **Actions > Follow Ticket,** the ticket will stay in your Following view and you will receive notifications around ticket updates.



Ticket Owner

The ticket owner field shows who on the team is responsible for responding to and resolving the ticket.

Ticket Status

The ticket status property indicates which stage in the resolution process we are in.

Category

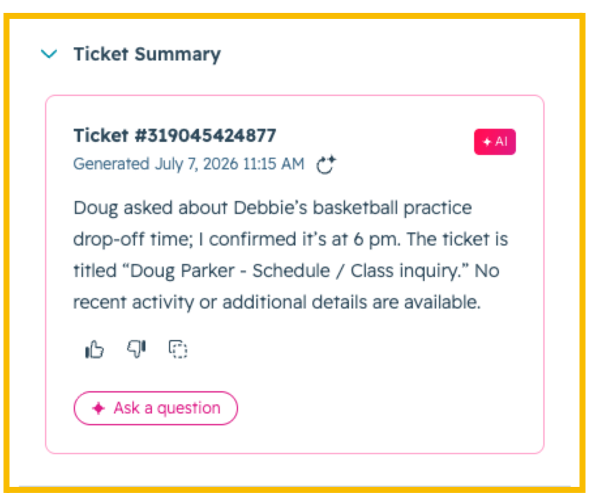
The category property powers the assignment (ticket owner) and the priority.

Ticket Description

The ticket description will always show the initial question that the guardian asked.

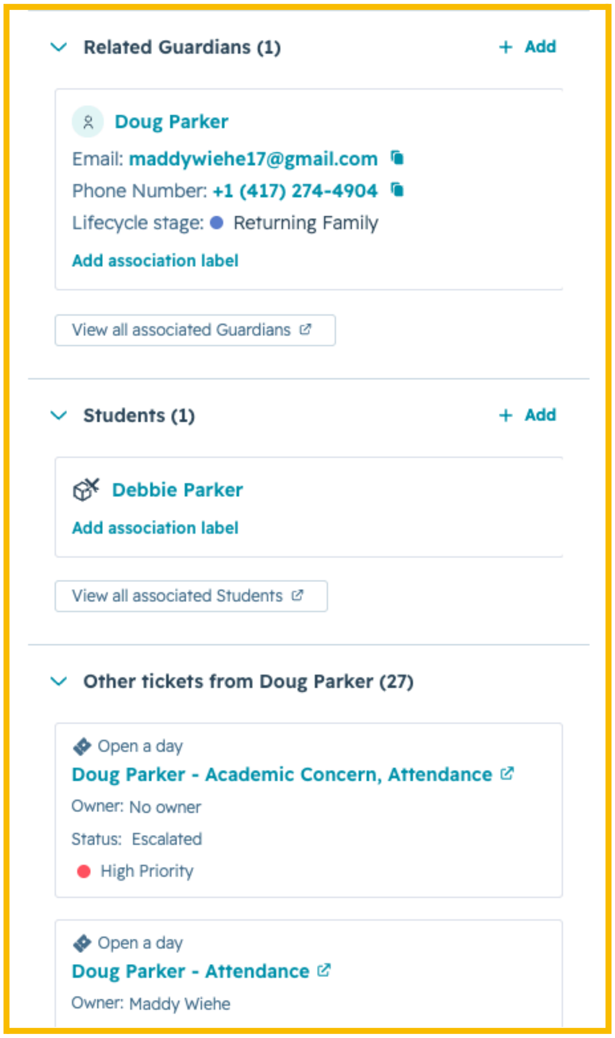
Priority

The priority indicates how urgent a response is needed to the guardian.



Ticket Summary

The ticket summary shows an AI generated overview, summarizing the history of a ticket



Related Guardians

The related guardians card shows which guardian initially asked this question.

Students

The students card shows which student this guardian is inquiring about.

Other Tickets

The other tickets card shows all other questions (tickets) this guardian has asked.

Your Day to Day

BEST PRACTICE

Check your Help Desk at least **three times a day**: once in the morning, once around midday, and once before you leave for the day.

When you check your help desk, follow these three steps:

1. Check your My Team's Unassigned view

If there are any tickets in this view that you are available to resolve, assign yourself as the owner.

2. Respond to tickets in the My Tickets view

Ensure you have responded to any tickets in this view and close out the tickets that have reached a resolution.

3. Check your My Mentions view

This will show you any tickets where another team member has tagged you in an internal note.

NOTE

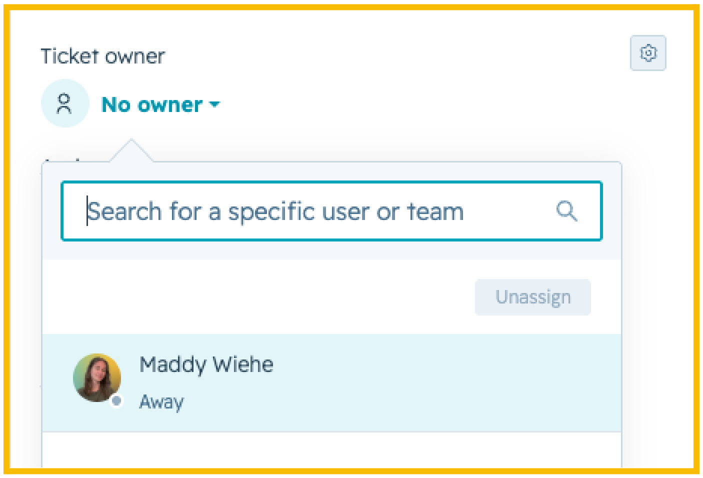
The following modules will walk you through these three steps

MODULE 5 | **Claiming Your Tickets**

Step 1: Claiming Tickets in Your My Team's Unassigned View

My Teams Unassigned

Any ticket that comes in under your categories, or that gets escalated, lands in the My Teams Unassigned view. This is the most important view to check regularly. **We always want this number to be zero.**



Claiming a Ticket

If you're available to take on a ticket, click on it and go to the Ticket Owner field on the **right-hand side**. Select the dropdown and choose your name.

This assigns the ticket to you and indicates that you are responsible for responding to and resolving this ticket.

IMPORTANT

If you don't see anything in the center column, don't be concerned — check the Ticket Description field on the right-hand side. It will always tell you what question the guardian asked or what note you need to be aware of.

My Tickets

Once you assign yourself a ticket, **it's removed from My Teams Unassigned and moves into your My Tickets view**. It stays there and it's your responsibility to respond to, work, and resolve it until you close it out.

MODULE 6 | **Responding to Your Tickets**

Step 2: Respond to Tickets in the My Tickets View

Once you have claimed a ticket, you will respond to the guardian either via email or over the phone.

IMPORTANT

Before responding, take a look at the information available to you in both the center column and on the right hand side. The ticket description property will always show the guardian's initial question.

SLA Time & Priority

Every ticket shows an expected time to first reply and time to close in the top right corner, along with a clock icon in your inbox:

- Red: the response or close time is overdue. **Respond to these first.**
- Yellow: the SLA is approaching quickly. **Respond to these second.**
- Grey: you have a comfortable amount of time to respond.

IMPORTANT

These timeframes are our initial anticipation only. **Your team will not be evaluated or measured against them.**

The purpose of these SLAs are to help us understand how long the process typically takes and to ensure a question receives a response in the instance that you are out of office or in a long meeting.

Responding via Email

The response box functions like an email inbox. Draft your reply and click Send to deliver it to the guardian. Any reply they send back will also show in the center column.

Responding via Phone or In Person

You're also welcome to call a guardian or speak with them in person. You can find their phone number under Related Guardians on the right-hand side.

IMPORTANT

Anytime you speak with a guardian by phone or in person, **you must log a note documenting the conversation and its outcome**. This is the only record the system has of that conversation, and it keeps our history of communication complete.

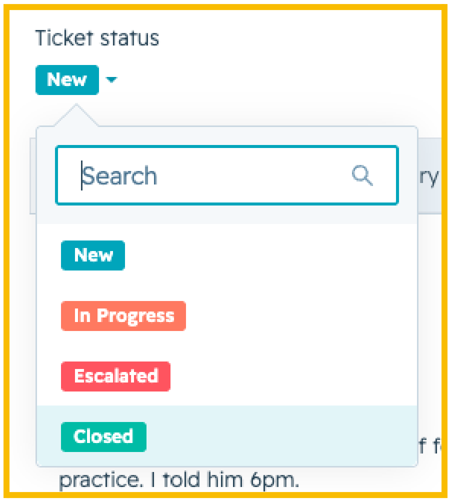
Leaving Notes & Tagging Team Members

Use the Note tab to log an internal note, which are never visible to guardians. To bring in another team member, type @ followed by their name; they'll be notified and the ticket will show in their My Mentions view. Any ticket where someone tags you will also show in your own My Mentions view.

MODULE 7 | **Closing Your Tickets**

Step 3: Closing Your Tickets

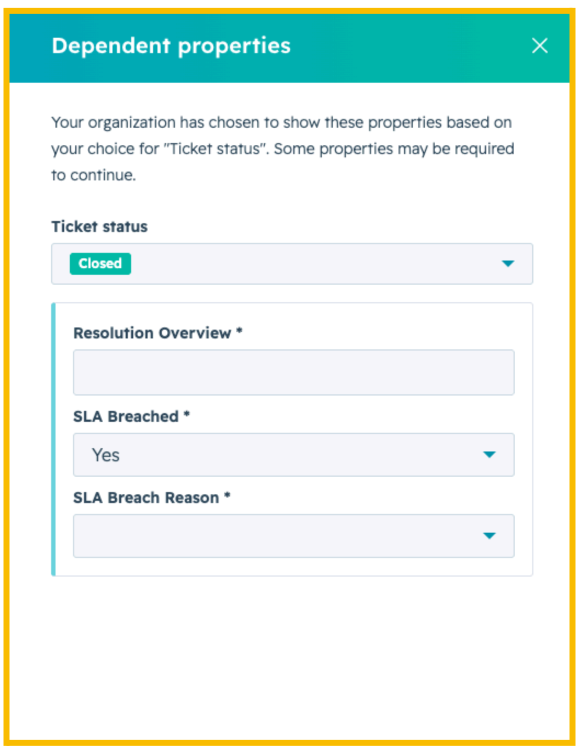
Once you've reached a resolution with the guardian, you will need to close the ticket. This indicates that we have fully answered the guardian's question or addressed the guardian's need and no further action is needed.



Closing a Ticket

Select the Ticket Status dropdown **on the right hand side** and click Closed.

Once you select closed, a form will appear on the right hand side with a few fields that are required to fill before the ticket can be closed.



Resolution Overview

Document how the question was resolved and what the outcome was.

This lets anyone reference back to a closed ticket without digging through notes and emails, and it helps us push back on any "he said, she said" situations.

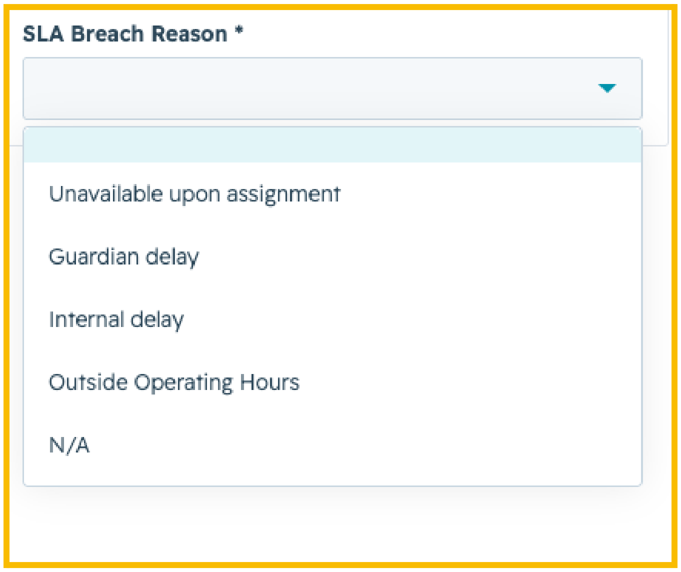
SLA Breached & SLA Breached Reason

If you or the original owner were unable to respond to or resolve the ticket within our SLA timeframes, the SLA Breached property will say Yes and you will need to document the reason why we were unable to meet the SLA expectations.

REMINDER

These timeframes are our initial anticipation only. **Your team will not be evaluated or measured against them.**

The purpose of these SLAs are to help us understand how long the process typically takes and to ensure a question receives a response in the instance that you are out of office or in a long meeting.



SLA Breached & SLA Breach Reason

By default, SLA Breached is set to No and SLA Breach Reason is N/A.

If the ticket goes over its expected response or close time, SLA Breached will switch to Yes, and you'll need to select a reason from the dropdown provided.

IMPORTANT

If none of the listed reasons fit, select N/A and add the actual reason directly in the Resolution Overview. That way we still have a record of why the ticket was breached, and we can continue adding new reasons to the dropdown as needed.

Once the Resolution Overview and SLA Breach Reason (if applicable) are filled in, click Save to close the ticket.

MODULE 8 | **Cheat Sheet, Support, and Resources**

Your Cheat Sheet and Support Options

As an Admin, DSO, or Principal, you will be responsible for:

Checking your Help Desk in the morning, around noon, and before you head out for the day:

1. **Important:** Check the **My Team's Unassigned** view **regularly** and assign yourself any tickets you're available to resolve
2. Respond to any tickets in the **My Tickets** view and **close the ticket** or **document next steps.**
3. Close tickets and **document SLA Breach Reason** when appropriate.

How to Get Support

1. **Start here:** Check the LTS resource knowledge base for a step-by-step overview of the process.
2. **HubSpot Knowledge Base:** Search HubSpot's knowledge base for additional guidance on using the tool itself.
3. **Reach out to Kristen or Janet** with any process questions not covered in the landing page or Knowledge Base.

Quick Reference: Key Tips

1. Every guardian interaction becomes a ticket: phone and in-person via the secretary's intake form, email automatically.
2. Tickets in your categories, and any escalated tickets, are unassigned by default. **You must claim them from My Teams Unassigned.**
3. Always log a note any time you speak with a guardian by phone or in person.
4. Always complete the Resolution Overview when closing a ticket.
5. Internal notes are never visible to guardians. Use them freely, and tag colleagues with @.
6. If a reason isn't listed in SLA Breach Reason, select N/A and document the real reason in the Resolution Overview.

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