

A Guide To Values-Driven Outcomes & Operational Efficiency



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Student Success is Priority One

Helping students build the capacity to approach learning with a curious mind is one of the most powerful and important things you can do.

You are also responsible for running and operating a profitable business.

Taking time to evaluate your day to day operations will save you resources and energy - allowing you to focus on higher priority activities that drive real student outcomes.

In this ebook, you will find tips & best practices for:

- Scheduling & Time Management
- Tutor Payments & Invoicing
- Relationship Building
- Growing & Advertising Your Tutoring Business

Terms To Know

1 ROI

Return On Investment is a performance measure you can use to best assess and allocate your time and resources. A high return on investment is what businesses strive for (although it is not everything).

2 Support-Circle Of Learning

In the Support-Circle of Learning the student is considered an active partner, the tutor is considered a facilitator, and parents are passive-active partners.

3 Sales Funnel

A Sales Funnel is a multi-step process that helps marketers and sales teams attract potential customers and convert them into paying customers. There are many steps and decisions that occur between when a potential customer becomes aware of your product, when they enter your funnel, to the time they complete a purchase, and when you secure them on a recurring contract (in this case week to week lessons).

Terms To Know Continued

4 Onboarding Process

Customer onboarding is the process of welcoming new parents and students, addressing their questions and concerns, and ensuring they understand what is available to them. For students, this is getting to know their tutors, the tutoring process, and what to expect. For parents, it is providing resources, check-ins, and access to online tools.

5 Customer Success

Customer success is a proactive strategy for understanding and supporting your customers' desired outcomes. Not to be confused with customer service, which is a reactive tactic that focuses on fixing problems to keep customers satisfied.

6 Administrative Debt

Administrative Debt is attributed to implementing a manual solution with **low capital costs, but high labor costs**. Manual solutions are limited in their ability to scale or operate smoothly without constant oversight.

Why Running A Tutoring Business Is Complex



Tutoring As A Business

Education is the foundation of a strong, resilient, and forward-thinking society. It shapes the minds of youth from the earliest of years.

As such, educators (and those in the business of educating) are **held to a higher standard than most**.

Multiple stakeholders and institutions must attempt to work together to ensure students feel supported throughout their learning journey.

Your tutoring business is an increasingly essential piece of infrastructure in this journey, helping learners of all abilities reach their educational potential.

From classroom performance and grades to building confidence and resilience in learning, you are responsible for helping learners succeed in and out of the classroom.

No pressure!



Finding The Balance

All of the work you do outside of ‘the classroom’ is essential to helping students succeed inside.

You have tutors to hire, resources to develop, parents to onboard, payments to send, invoices to collect, schedules to keep track of, reports to generate, and fires to put out!

Because there are so many moving pieces, it is no surprise that **most tutoring business owner-operators find themselves stretched for time.**

The best tutoring businesses develop a sustainable business model driven by their values. It feels like a cliché, but purpose must meet profitability - you need a healthy ROI.

Ultimately, if you lead with your values, back it up by helping students succeed, and think like a modern-day entrepreneur, you are well on your way to being a leader in the educational space.



Learning From Others & Your Operational History

No matter where you are located or what grades and subjects you service, you likely know:

- Running a tutoring business is hard, whether or not you consider yourself a business person.
- Tutoring is about more than just grades.
- Excessive time spent managing people and resources can drain your admin team.
- Tutoring is a referral-based business - great client experiences and outcomes go a long way.

Unfortunately, many tutoring companies and owner-operators:

- Have some form of administrative debt.
- Are spending more time acting as a 'middleperson' rather than a facilitator.
- Do not have the capacity or resources to spend time on higher-value activities.
- Are not sure how to effectively advertise their tutoring business.

Questions To Reflect On:

When evaluating your current operations, start with:

1. How are you allocating your time?
2. How are you managing changing schedules?
3. How much of your admin time goes towards acting as a “middleperson”?
4. Are you efficiently collecting payments and getting your tutors the money they need?
5. What kind of relationships are you building with parents? Tutors? Students? Your team?
6. Do you have the capacity to grow your business if you choose to?
7. What approaches and tools do you use for your sales and parent onboarding?

Now, let's take a closer look at some of the critical pain points most owner-operators are facing.

Scheduling And Time Management



Schedules will change.

Students will fall sick. Parents will have emergencies. Tutors will have other commitments.

You have to be able to **adapt and accommodate, this is the nature of the business.**

However, handling changing schedules can put a significant strain on your day-to-day.

What Is Your Approach To Scheduling?

To establish your baseline, start by asking yourself:

- How are your tutors notified of scheduling changes? How many points of contact are there?
- What happens when there is a last-minute cancellation?
- Does your admin team have a verification process to confirm the changes or cancellations with the tutor, student, or parent?
- How (or) do your tutors log adjustments to their schedules? Who facilitates the process?
- Where do you keep an accurate record of these changes for invoicing?

How To Manage Tutor Scheduling & Cancellations

Try to **mitigate the amount of time everyone spends going back and forth**. Have a process, use a tool if needed, and be clear on your policies with tutors and parents.

Whatever you are using to keep track of scheduling changes (i.e. SMS messages, tutor scheduling software, or email), consider adopting these 3 best practices:

1. Set Cancellation & Scheduling Expectations After The First Successful Tutoring Session
2. Help Your Tutors Own The Parent Relationship
3. Handle Fires, Not Sparks





STEP ONE:

Set Cancellation & Scheduling Expectations After The First Successful Session.

Onboarding parents and prepping for new students is a big part of successfully growing (or maintaining) your customer base and sales funnel.

Your discovery call should always focus on the student and their needs. Your goal is to **achieve initial parent buy-in and gather as much information as possible.**

Post lesson, a quick parent follow-up goes a long way.

This is the perfect time to make the parent feel heard and lay down your flexible but firm scheduling policies - don't be afraid to make exceptions (compassion drives customer success).



STEP TWO:

Help Your Tutors Own The Parent Relationship.

Help tutors and parents feel comfortable enough to sort out week to week scheduling and learning activities between themselves.

Tutors Need:

- To be systematically involved in the parent and student onboarding process.
- To be trained on relevant tutor management software (if applicable).
- To be provided training resources for client management.
- To have a formalized process for addressing serious student or parental issues.
- To feel supported by your administration team.



STEP THREE:

Handle Fires, Not Sparks.

You need to choose where your attention and energy are going.

Emails, texts, different excel sheets, and various phone calls can become a poorly scattered set of bread crumbs you are trying to make sense of when managing schedules.

You want to be the default point of contact for any ongoing or severe issues. However, a more formalized and delegated workflow goes a long way.

Tutor Payments & Invoice Management



Managing payments and collecting money can take up a lot of administrative resources and drain your energy.

If you find yourself spending a lot of time answering emails and messages about payments and invoices, you already know it can be a pain in the neck keeping track of:

- Who has paid you.
- Who still needs to pay you.
- Who you need to pay.
- When you need to pay it by.
- How you are going to pay.
- How much it will cost you.

Organizing payments and invoicing in a google sheet (or something similar) can work when you are small, but it can lead to an ongoing headache as you repeat the process month after month.

Tutoring management software, or similar payment tools, make a big difference in your ability to manage tutor payments and customer invoicing - but they are not a silver bullet.

Your tutoring business needs to **develop an approach to payment management and invoicing that is software agnostic.**



STEP ONE:

Set Billing Expectations With Parents After The First Successful Tutoring Session

Payment and cash management is about policies and setting expectations.

On top of asking about how a lesson went, be sure to:

- Provide any supporting documents and payment schedules.
- Review fees and policies for scheduling and last-minute cancellations.
- Train parents on any tutor management software or payment tools you are using (if you have not already done so).

Be flexible but firm.



STEP TWO:

Create A Process To Easily Track Hours & Pay Tutors

You need to establish:

- A consistent, trackable way for your tutors to invoice you.
- A standardized payment receivable timeframe (an acceptable amount of time in which you will pay tutors).
- A workflow process for how you are going to pay them (there is nothing worse than e-transfer limits and fees).

Consider taking the following steps:

- Use an official contractor invoice template.
- Pay within 15 days if tutors' tracking sheets are completed and accurate.
- Use a tutoring management software platform or CRM to **keep documents centralized.**



STEP THREE:

Schedule A Time Each Week & Pick The Right Tool To Help

Be sure you set aside a designated time each week to keep up with your bookkeeping - there is nothing worse than having to do it all at the end of the month.

Administrative debt can become difficult to manage as you grow, or look to reduce your time spent on administrative tasks - **payment management can help reduce this burden.**

Invoicing Software To Check Out:



Relationship Building With Parents & Tutors



A healthy and open tutor-parent-admin relationship is vital in the support-circle-of-learning.

Building trust with parents and tutors will give students a better chance at reaching their goals and help your tutoring business thrive.

Building Trust With Parents

Parents are partners on a student's learning journey (particularly in the early grades).

It is your responsibility to **establish a foundation of trust** before the student completes their first lesson (online or in-person).

Developing a relationship during the onboarding process is that much more important when you have demanding parents, complex home environments, or learners facing other challenges.

Everyone wins when you build trust.



Tips For Building Trust With Parents

1. Have an in-depth discovery call about the student before the first lesson.

- Review student's emotional, social and learning needs.
- Establish high-level parent-tutor-admin expectations.
- Train parents on tutor management software (if applicable) and send any supporting resources.

2. Follow up within 3 days of first lesson via phone or email.

- Review how the session went.
- Discuss resources and the role you encourage parents to take moving forward.
- Share a digital recording of the lesson and notes from the tutor (if applicable).

3. Create an on-going check-in process

- Set a time at the end of the first month for a member of your team to speak with the parent and tutor.
- Establish a way for parents to provide on-going feedback moving forward.

Building Trust With Tutors

Tutors, like teachers, can make or break a student's learning experience.

Tutors work week in and week out, helping students build the knowledge and confidence to succeed.

If you want to build relationships with students, **invest in your tutors.**

Some Things You Can Do:

1. Involve tutors in the student onboarding process.
2. Host training sessions and supply ongoing tutoring resources, including any feedback from clients.
3. Provide tutors with the tools and training to manage 85% of the parent relationship.
4. Ensure tutors know you have their backs.

Spend Time Nurturing Relationships

As your business grows (or life gets busy), it becomes more challenging to connect with every new parent, tutor and student.

Take the time to craft **an operational approach** that allows you to stay connected.

Finding a way to collect feedback from students, parents, tutors, and your team will only make your business better.

There is nothing more valuable than building relationships with the people who make running your business possible.



Deciding To Grow Your Tutoring Business



A successful tutoring business:

- Fosters excellent student outcomes (in and out of the classroom).
- Finds operational efficiencies.
- Attracts new clients and builds strong relationships with current ones.

You should only look to grow your business after it is running efficiently at its current size.

If you have mastered your day to day operations, it is a matter of deciding your next steps.

Decisions, Decisions

Do you want to grow your business or kick back and enjoy your new-found operational efficiency?

Your decision depends on your capacity, resources, and long term goals.

If you decide to grow your business, it is time to start looking at ways to market it!

How To Advertise Tutoring Services

Word of mouth is by far and away the most influential form of advertising you have at your disposal.

A satisfied parent is the best advocate you can have at schoolyard pickups and wine nights.

However, word of mouth can be slow to reach a bigger audience.

You should consider utilizing the digital world to **reach a broader set of potential clients**. It will improve your chances of onboarding new clients - particularly as school boards, governments, and parents are encouraged to adapt.

There are various channels, partnerships, and marketing tactics you can employ to grow your business. However, you need to start with the basics.



Top Tips For Growing Your Tutoring Business

1. Create A Sales Process, Not Just An Onboarding Process
2. Reward Referrals
3. Utilize Your Tutoring Management Software
4. Focus On Child Outcomes & Ensure Parents Feel Heard
5. Build Partnerships With Educational Institutions

Think About The Future While Enjoying The Present



There is nothing more rewarding than having your business thrive while seeing students' grades increase and their confidence shoot through the roof.

The Pros Of Running A Tutoring Business

- Building A Community Of Learning Based On Strong Values
- Working With People Who Love To Educate
- Seeing Students Grow & Succeed
- Feeling Ownership Over What You Do Everyday
- Leading A Growing Industry

The Challenges of Running A Tutoring Business

- Spending Too Much Time On Administration
- Acting as Middleperson Instead Of Facilitator
- Managing Client Expectations
- Maintenance vs Management vs Growth



Outdated administrative approaches or tools will pull you further away from high-value activities like building relationships and growing your business.

It might take a bit of investment and a mental shift, but putting the time in now will pay off sooner than you think.

Think about how your tutoring business might be able to adopt some best practices into your everyday.

Whether you are actively growing your business or not, be sure to enjoy the present while planning for the future!



Questions or comments?

Reach out to support@lumened.io