####

Strategic Marketing Plan

20XX-20XX School Year

# Executive Summary

To reach the Strategic Financial Plan goal of [XXX K-12] students in the fall of [2020], inquiries will need to increase across all divisions by a minimum of [5] percent each year. After analyzing demographic data and historical admissions data, a [7] percent increase in inquiries is estimated.

To reach a [7] percent increase in inquiries, marketing will focus on [four] strategies:

* Strategy 1 (i.e. internal marketing to engage faculty and staff)
* Strategy 2 (i.e. external marketing to promote the school and its programs)
* Strategy 3 (i.e. foundational tracking and research programs)
* Strategy 4 (i.e. internal parent community building to engage existing parents to build referrals)

# Situational Analysis (SWOT)

## Strengths

Identify your points of strength.

* Strong enrollment?
* Strong leadership?
* Amazing alumni base?

Detail 3-5 of the biggest points of strength.

## Weaknesses

Identify where you are weak.

* Is your competition really strong academically?
* Do you lack a cohesive message and identity?
* Do you have high attrition due to lack of programs?
* Do you lack marketing budget?

Look through each area of your school, and document 3-5 of your greatest weaknesses as an institution. Do not sugar-coat. Be brutally honest.

## Opportunities

An opportunity is anything you know that is coming up, which could positively impact your school. For example, do you have an upcoming capital campaign? Usually admissions can piggyback on the budget and efforts of the campaign to gain even more exposure. Or perhaps you are launching a new website with additional conversion metrics. Maybe you are growing your board and will get some major community leaders involved.

Also look for opportunities in your area. Is there talk of a public teacher strike? Are public school programs getting cut?

## Threats

Identify threats that could affect your enrollment.

* Are public schools getting a lot of good press lately?
* Are any competitor schools launching new buildings or programs in the next 1-3 years?
* Are public schools or competitors changing their grade delineation and shifting when middle school starts, thus shifting entry-levels?

Look carefully at the competitive landscape. Look for anything that could impact your school. Some threats, if identified early, can be turned into opportunities.

# Demographic Analysis

## Overview

This below data outlines the rationale behind estimating a [5-7] percent increase in inquiries over the next five years with a high goal of a [7] percent increase.

## Enrollment Goals

Usually there is a strategic plan that dictates your ideal enrollment. Explain that number and any other caveats such as a new building opening in 2 years or expanding a grade level.

## [Your City] Demographic Data[[1]](#footnote-1)

Give a quick summary of findings such as, households with school-aged children in the city of [Your City] are expected to increase by [.06] percent by [20XX] with a [4.67] percent increase in school-aged children. The greatest increase in school-aged children is in the [X] age group with decreases from grade [5 to 12].

Other stats at a glance for [Your City]

* Population in private schools is expected to increase by [13.88] percent in [20XX]
* Families with one or more children aged 0-4 and income $150,000 and $199,999 is expected to increase [26.79] percent



Other stats at a glance for CBSA (core-base statistical area)

* Households with children aged 0-17 is expected to increase [8.61] percent by [20XX]
* Population in private schools expected to increase by [15] percent by [20XX]
* Populations in school are expected to change as follows:
	+ Nursery or preschool: [15] percent
	+ Kindergarten: [-4] percent
	+ Grades 1-4: [12] percent
	+ Grades 5-8: [-19] percent
	+ Grades 9-12: [-4] percent

## Admissions Funnel History

The following chart takes into account the following assumptions:

* [Six]-year attrition averages by grade
* Maintaining [20XX-20XX] admissions year division-specific funnel conversions (Inquiry to enroll)
* [X] percent increase in inquiries year over year

[INSERT TABLE: Show the grades you offer taking into account the above calculations. This part can be tricky.

## Conclusion

Summarize the above data to drive home why you expect your enrollment to increase or decrease.

# Customer Analysis

## Benefits

*Identify the benefits of choosing your school as well as how these benefits can be communicated.* Highlight your best, most notable differentiating benefits.

* What kind student/human-being does your school produce?
* Do you offer more APs than other schools?
* Do you offer unique experiences such as international trips?
* What is the main benefit you will hang your hat on?

Your benefits should support your core messaging of who you are. For example, a primary benefit is that your students become citizens of the world, unafraid of new cultures and experiences. You do this by offering international trips at every grade level…etc.

## Costs

*By choosing your school, what do parents and students have to give up?* Tuition, fees, transportation time, volunteer time, ease of payments (or lack of ease), after school care, etc. are all costs associated with any independent school.

How will your messaging address these costs? Make sure you have a “party line” for each cost so they can be addressed quickly and effectively so you can focus on the benefits.

## Others/Community Assets

*What key community members might influence parents or students to choose your school?*

* How does your school build community?
* How is your school involved in the larger area community?
* Are there vocal education leaders in the community who endorse your school? Are any of these leaders’ children alumni?
* What assets do you have among your parent leadership? Can they host in-home informational coffee sessions for their neighborhood?

## Self-Assurance

*Will parents and students believe they can join your school?* The cost in both time and money for parents are substantial when choosing an independent school. Testimonials will be used to reinforce that your school is worth the time, money, and energy and that success at the school has, can, and will be achieved. Independent schools can be intimidating. How will you decrease the barrier to entry and make prospective families feel like they belong?

# Competitor Analysis

In a spreadsheet (or other format) list out your competitors for each division. Then list out their core message, tuition, social media sites, and other appropriate categories such as how many AP courses they offer, their average SAT score, or the number of National Merit Scholars they had the previous year.

How does your school stack up? Is your messaging unique? Where do you fall short? How will you address where you fall short in your messaging? (This should be added to the “Costs” section above as well.)

# Positioning Strategy

## Current Situation

Until now, how has the school been positioned? Have you been using a specific tag line or message? Was the message recently changed for a capital campaign, an annual fund push, or a big anniversary?

## Future Market Opportunity

Based upon what your enrollment research tells you about the location of your draw areas and your demographic trends, is there new market opportunity anywhere? Is there a big influx of a certain age group in your area?

## Internal Audience

Does your internal audience (leadership, faculty, staff, parent leadership) know your position? Are they speaking one message or does it differ?

## Desired Market Position

Volvo is known for safety, what are you known for? Ask people who are outside your usual community and see what they say. If you have time/budget for a community survey, we recommend this route to see what other people are saying about your school. Then compare those perceptions with what you *want* to be known for.

## Positioning Statement

For (*target audience: )*, *(organization name: )* is the *(frame of reference: )* that delivers *(benefit/point of difference: )* because only *(organization name: )* is (*reason to believe: )*.

Example:

For XYZ City families with school-aged children who value experience over material goods, ABC is the K-12 school that delivers experiential education, because only ABC dedicates 80 percent of tuition to trips, outdoor education, and community service.

This positioning statement should be printed and placed in any office where someone is writing content for the school. For every ad, ask yourself “would this resonate with XYZ target audience” and “does this focus on the reason to believe?” If it doesn’t match with your positioning statement, there is a good chance it will confuse your audience.

# Marketing Mix

We recommend dividing the below segments by the percentage of resources you want to allocate. This may change from year to year. Some years you may spend 70 percent of your resources growing your product and infrastructure, while other years you may spend 90 percent of your resources on straight promotion. It depends a lot on what holes you have to fill. We don’t recommend spending 100 percent of your resources in one area for any year.

## Product – XX Percent

Based on what you have learned about your competitors, how much emphasis do you need to put on improving your product/school offerings? Product could also include your admissions process. If you don’t have a clear admissions communication sequence, that may require some resources. This also includes if you need to recruit for any key positions. Marketing should be involved in putting together recruitment materials to attract mission-appropriate candidates. Marketing should also be involved in onboarding new staff and faculty to set expectations early on that marketing is everyone’s job. These are just a few ideas of how marketing could be involved in product.

## Place – XX Percent

Based on what you have learned about your competitors and demographic growth, do you need to spend resources launching a bus program or satellite campus or improve the building itself?

## Price – XX Percent

How does your pricing compare to competitors? Does there need to be more focus on scholarships and financial aid or an adjustment in the way aid is allocated? What about additional fees? Is it time to review rolling fees into tuition?

## Promotion – XX Percent

Traditionally, this is what most people think about when you say “marketing.” How much of your marketing resources are going to go to promotion activities vs. product, price, and place? This includes advertising, events, community outreach, etc.

# Communications Strategy

## Value Proposition

It is important to remember the value equation:
 *perceived value* = *perceived benefits / perceived costs*

Keep the focus on benefits and figure out how to talk about the costs in an authentic and honest way. Talking points on the costs are key to keeping the message focused on the benefits while addressing costs.

# Advertising Strategy

## Budget

What divisions or grade levels are a priority this coming admissions season? Do you need more middle schoolers than high schoolers? How will you split your budget across divisions?

What about timing? Will you spend 80 percent of your budget before March 1? Will you leave any budget as a buffer to boost campaigns that work exceptionally well?

## Messaging

What is your primary advertising messaging for each division? For example, go beyond merely “Open House.” Any messaging should mention your benefits and target each division. High school ads should look different from elementary or middle school ads. Be as segmented/targeted as your budget allows.

## Target Focus

Are there specific cities or certain neighborhoods you are targeting? Income levels? Other affinity groups (such as music, sports, etc.)?

## Mediums/Media

How will you divide your budget by advertising medium? Are you going to test Facebook ads this year? Are you going to cut down on your print ad buy?

These are high-level summaries of how you intend to use each medium.

### Print

What are you going to use for your vanity URL for tracking? What about for call tracking? Are you going to focus on magazines, newspapers, or something else entirely?

### Digital Media

Are you going to use digital ads to test messaging before you spend a lot of money on print ads? For example, maybe you’re going to test messaging in early fall, and use the best performing messages in a large print ad in January.

### Radio

Will you use radio? If so, how will you track the ads? What will you test this year, maybe early morning ads vs. evening ads? Is there a group ad buy with other independent schools you want to try out this year?

### Direct Mail

Based on your data about where your families live, are there any neighborhoods or cities you want to send a postcard to? What about postcards to your existing families to tell their friends about an upcoming open house? Or perhaps you are doing a long-term messaging campaign with a series of direct mail pieces promoting your school’s differentiating message.

# Overall Evaluation Framework

How will you measure your success for the marketing plan? Usually, you do this is by tracking straight inquiry numbers on a weekly or monthly basis, and then track those against your inquiry increase goal. Present it much like the traditional capital campaign thermometer-type of graphic.

# Barriers to Implementation

Honesty time! What are your barriers to executing this plan? Are you missing key faculty positions? Do you have a brand-new head of school that needs time to settle in? Is your board 50 percent new? Is your school itself new?

This is important to recognize. You may not hit your goal, so talk through the barriers up front, so everyone understands what you’re up against and understands if you don’t complete all your projects. This is a fluid document and will shift tremendously over the next 1-3 years.

# Project Implementation Plan Summaries

This is the fun part! How are you going to increase inquiries?

Start with your pain points. List out everything that is a massive black-hole of time and energy that should be fixed. Think about your parent experience…think about your faculty experience…think about your student experience. What needs to be fixed? Once you have listed the fix-it items, put them in a priority list.

Next, think about your data. Do you have the data you need to make strategic decisions? Do you know how many inquiries you got from your last ad campaign? If not, that is going to be a high priority for year one. What about your institutional research agenda? Do you have your parent and student surveys scheduled?

Finally, look forward. What have you been dying to try or get setup? This is your opportunity to get a couple of reach items on the agenda.

Once you have the lists as full as possible, look at your work load, budget, and staff and prioritize the lists. The last step is to summarize your project implementation plan. In this document, it is important for stakeholders to see enough detail to buy in, but not so much they micro-manage your project. To start, we would expect 10-20 initiatives to start. Be realistic about what you can accomplish, and table all other ideas until the following year. Keep a running list of ALL ideas but focus on the projects in this plan.

Here are some examples:

## Research, Data, Tracking

### Your School’s Research Agenda

**Why:** The marketing department should direct all surveys and data collection activities so there is a single location to gather, analyze, and report on the data to ensure consistency and reduce redundancy.

**Timeline:**

* Year 1-- basic analysis
* Year 2-- organization
* Year 3-- implementation

**Strategy:**

* Year 1. The marketing team tracks all surveys.
* Year 2. The marketing team reorganizes surveys to ensure that timing and layout are optimal. Marketing should also ensure that there is no question redundancy.
* Year 3. Marketing works to streamline data processes and procedures. Once consistent practices and methods are in place, reporting will begin.

### In Depth Competitor Analysis

**Why:** To remain competitive, a comparative study of independent schools’ admissions strategies, tactics, and programs in your area is needed.

**Tracking:** Tracking entails creating a communications sequence, which should be completed for each competitor school. This information collection includes materials gathering, secret shoppers touring schools and/or attending open houses, and then writing reviews.

**Timeline:** Tracking should be completed by January 1.

**Strategy:** Hire a secret shopper to inquire into targeted area independent schools. The secret shopper will track all interactions and write a formal report on the differences of each experience.

### Advertising Tracking

**Why:** Beyond digital marketing, it is extraordinarily difficult to track what advertising works and what does not. To be a better steward of tuition and donor money, additional tracking is needed.

**Goals:** Redistribute advertising dollars to ads that bring more conversions.

**Tracking:** Use methods such as CallRail to secure unique phone numbers to be published on ads within each media outlet. Utilize unique URLs for published/linked advertisements with distinct landing pages so digital conversions are trackable.

**Timeline:** All year

**Strategy:** Assign a unique phone number to each media outlet, so that you are able to track how many calls each outlet generates. You will then be able to show which ads result in more inquiries, and you can readjust your advertising budget accordingly.

## Internal Marketing

### Faculty/Staff Outreach

**Why:** The faculty and staff constitute a powerful marketing resource that is usually underutilized in schools.

**Goals:** By the end of Year 3, each faculty and staff member should be able to state the school’s key positioning statement.

**Tracking:** Introduce every faculty member to the positioning statement. Reinforce the statement throughout the school year in a variety of ways.

**Timeline:** All year

**Strategy:** Soliciting initial input from staff as well as strategically organizing message reinforcement campaigns and activities during the peak admission season can help build a solid relationship between marketing and faculty. Create communications that make faculty feel supported in their efforts and accomplishments.

### Forms Overhaul

**Why:** Parents generally don’t appreciate forms in the summer. Streamline your forms into a positive touchpoint to reinforce the value proposition to new returning families.

**Goals:** Parents will feel as though the school values their time with a streamlined form process.

**Tracking:** Include a short set of survey questions in fall paperwork to check on parent satisfaction.

**Timeline:**

* Review forms in the fall, with survey responses.
* Outline plan in winter.
* Launch new form plan in spring.

**Strategy:** Review formats, contact other schools, interview parents for what format and content works best and most conveniently.

## Outreach

### Speaker Series

**Why:** Become active, audible, and expert education voices in the greater community.

**Goals:** Increase community awareness of programs, expertise, and increase inquiries.

**Tracking:** Track event, attendance, demographics, program content, and other pertinent information and data at each event.

**Timeline:** Year long

**Strategy:** Target local speaking engagements that enhance your position as an influential voice in education. Actively track all inquiries (donors, applications, etc.) resulting from each speaking event.

### Review Site Analysis

**Why:** Review sites like Yelp! are tied to SEO and tend to show up on the first page of search results when searching via geolocation devices.

**Goals:** Ask “leader parents” to post three positive reviews on Google, Yelp!, and Facebook.

**Tracking:** Monitor posts to each site.

**Timeline:** Complete by November 15.

**Strategy:** Solicit on an individual basis active and satisfied parent leaders to provide reviews on Google, Yelp!, and Facebook.

1. Look at the NAIS Detailed Trends Report & Analysis [↑](#footnote-ref-1)