

## TOOL BOX

### BUILDING YOUR MARKETING SYSTEM by Christina Drouin

Consider taking the following steps to move your school toward becoming a market-oriented organization with working marketing systems:

1. Obtain board, head, and leadership team support and develop a marketing philosophy.
2. Create an effective organizational design that can execute the philosophy based on:
  - Structure (person or department) to build and manage the marketing systems;
  - Authority (best to report to head of school); and
  - Funding (each marketing system has hard and soft costs attached).
3. Internal marketing training to get faculty and staff onboard with strategic marketing.
4. Improve employee hiring practices to identify and select new staff aligned with the school's marketing philosophy.
5. Reward marketing-oriented employees.
6. Create or upgrade your marketing system to include Analysis, Planning, Implementation, Evaluation, and Feedback and Recalibration.

**Here are six approaches to help you get started.**

#### ***1. Take Stock of Need and Readiness: Strategic Marketing Planning Inventory***

- The school has a strategic plan with a long-term vision.
- The school has clear short- and long-term goals.
- The school has a clear product/service strategy.
- The school has a clear pricing strategy.
- The school has a clear distribution strategy.
- The school has a clear positioning strategy that creates value in the minds of its target audiences.
- The school has a clear promotion strategy.
- The school has a written strategic marketing plan.

## 2. Identify and Address Your Marketing Risk Situation(s)

At any given moment, every organization is at risk from at least one of the following marketing risk situations. This marketing risk situation is often the point of origin of marketing projects.

### **Situation: Decline in Enrollment**

**Marketing Objective:** Stop the decline

**Key Strategy:** Remarketing through revitalization/recycling; pinpoint and address the “fix-the-ship” issues

**Key Tactic:** Retention analysis and planning especially for key divisional entry point years, such as 6<sup>th</sup> and 9<sup>th</sup> grades, beginning 12 months prior to the transition

### **Situation: Inadequate Growth or Retention of Market Share**

**Marketing Objective:** Increase advancement and admission outcomes

**Key Strategy:** Market penetration, which seeks increased response to present products/services in present markets through a more aggressive marketing effort

**Key Tactics:** Improve retention rate; improve application; cross-sell other products such as summer camp to current and families and alumni; offer incentives for increased use (sibling discounts); step up promotion; differentiate your school more; try to attract nonusers by increasing product trial through offering incentives and samples (more open houses, community opportunities to use facilities, etc).

### **Situation: Static Enrollment**

**Marketing Objective:** Increase market share, enrollments or revenue

**Key Strategy:** Market development

**Key Tactics:** Improve relationships with referral sources; manage word of mouth referrals through parent ambassador programs; target different geographical areas that have characteristics similar to those from which you are currently drawing large numbers of families

### **Situation: Maintenance (Status Quo)**

**Marketing Objective:** Avoid complacency

**Key Strategy:** Stay close to constituents

**Key Tactic:** Establish an annual survey process to understand and get ahead of changes in needs, wants, expectations, and satisfaction levels of current constituents.

### **Situation: New Kid on the Block**

**Marketing Objective:** Successful launch

**Key Strategy:** New product or service development; take new product into current markets first, then open new geographic, demographic or psychographic markets



**Key Tactics:** Advertise and promote new programs or services among satisfied constituents such as current families and alumni; create experiential opportunities for target markets to come to campus to participate in events that showcase new offerings.

**Situation: Sudden Change**

**Marketing Objective:** Build a proactive marketing system

**Key Strategy:** Position for success

**Key Tactic:** Create an Educational Marketing Task Force to research and develop a marketing plan that positions the institution to respond to changes with targeted marketing programs and program/service improvements based on competitive and external environmental intelligence.

**3. Create a Strategic Marketing Plan (*Sample Format*)**

An executive summary.	Includes the key findings and strategic recommendations; presents an overview of the marketplace and the effect the strategic marketing plan might have on it; identifies resource requirements; identifies key marketers; establishes how the plan will be measured.
A situational analysis	The statement of fact about the health of the school and the most important marketing challenges and opportunities facing it.
A statement of goals	It is most practical to limit the Strategic Marketing Plan to four to six high priority, overarching marketing goals that are in harmony with the mission and vision of the school. Goals provide strategic direction to marketing efforts.
A statement of strategy	Strategies related to market segments, positioning, and marketing mix decisions that describe how the school will use marketing management systems to achieve institutional goals. Here will be a description of market segments, why they were selected and details of the exchange; positioning strategy for the institution to attract and retain its target markets in light of competitive factors; and marketing mix strategy, including details on product/service mix, pricing, place, and promotion.
Work plans	Implementation is accomplished through work plans containing outcome-based objectives and activities for each strategy. Each objective is assigned an individual or group responsible and accountable for its completion.
Evaluation framework	Monitoring and evaluation techniques include progress reports, timelines, outcome measures, and budgets. Regular reports should be made to the head of school based on results in these areas. By accomplishing objectives in a hierarchy, goals become self-fulfilling.
Recalibration Strategy	Be sure to devise a way to obtain and analyze new information about the changes in both internal and external environments. Test the ongoing validity of your underlying assumptions routinely (at least once a year) to keep your plan on track and relevant.



## 4. Apply the Marketing Model to Enrollment Management

### *Enrollment*

1. Identify problems in attracting and enrolling students.
2. Define goals and objectives.
3. Conduct market research.
4. Determine the marketing strategy including selecting target markets, setting the marketing mix, and setting the marketing budget.
5. Plan and implement an action plan.
6. Evaluate results.
7. Improve retention.

### *Retention*

1. Set up a Retention Task Force.
2. Assess the retention situation and set goals and objectives.
3. Determine why students leave.
4. Encourage an attitude of services to students.
5. Establish a good student to institution match in recruiting and admission.
6. Facilitate the student's transition to the institution.
7. Provide counseling, advising and support services.
8. Create a responsive environment where students know adults care deeply about their success.
9. Nurture each student's sense of belonging by connecting new students to affinity or interest groups early.
10. Develop ways for the student to contribute to the common good and make a positive impact on the school.

## 5. Use Key Strategies for Branding a School

- Make brand a strategic priority. Brands create value. The importance of brand needs to be acknowledged and resources allocated to the task of re-branding.
- Operationalize the school's brand by identifying, prioritizing and optimizing its high-impact brand touch points. This involves identifying where and how value is built and added at major touch points in the pre-admission, admission, educational experience and post-educational experience, prioritizing them in impact and importance and, then, continually measuring and improving the student's experience. Ask students "Are we important to you? How?" Ask families the same questions.
- Develop a brand assimilation plan to help board, faculty, staff and administration embrace and embody the school brand. Educate, communicate with and train faculty, staff and administration to change behavior as they move from "hearing it" to "living it."
- Measure the success of branding efforts.

## 6. Use Key Strategies for Positioning a School

### **1. Develop an 'outcome identity' that goes beyond classroom success.**

Many schools can benefit from more efforts to promote themselves as a continuum of learning opportunities. In drawing the upper school market, it is especially critical that schools develop an 'outcome identity' that goes beyond classroom success. Schools have attributes for promoting a distinct educational image that emphasizes their ability to compete. It is important to create visuals in all marketing media – print, electronic and atmospherics – that emphasize more strongly student outcomes.



## **2. Focus on the experience as well as the product.**

Many schools can benefit from promoting new brand images consistent with its educational offerings and articulating the attributes of a brand of education as it provides a focused and meaningful experience for the student. There are significant groups of prospects who may not be aware of the scope of services and students served by your school's mission. A key strategy in repositioning any school is to focus on individual market segments (geographically, demographically, psychographically) and emphasize issues known to appeal to parents and students in these segments. Develop a new brand position by determining what elements in the current brand position need to change to reflect the perceptions and expectations and what key themes will support and enhance the new positioning.

## **3. Position using Core Values.**

To position itself differently through branding, a school should use its core values to fully understand and articulate a uniqueness that is easily identifiable and that makes it stand out among its competitors. To survive in a competitive environment, a school must possess a uniqueness that can be creatively packaged and marketed, but it needs to be truly understood in its new context before presenting it to the world.

## **4. Build visual brand identity.**

Use key tactics of marketing communications to build brand identity:

- Develop message consistency, clarity, and repetition
- Use targeted media with matching demographics to reach market segments
- Communicate a strong visual identity manual
- Integrate print, electronic and relationship marketing programs and materials

## **5. Assess employee attitudes about new direction in branding.**

As the school's best ambassadors of brand, faculty, staff and administration need to be part of any resolve to branding and position the school. A plan to get this key group onboard is a top priority.

## **6. Employ tactics to increase brand awareness through an integrated marketing system of print, electronic, event-based advertising, publicity and promotion segmented by market.**

### **A. Target advertising**

- Use a targeted advertising and communications strategy to reach market segments whose media habits and preferences are known to you
- Buy space in major publications of influence for institutional repositioning
- Buy space in trade journals whose demographics match primary and secondary markets
- Size and frequency count when buying advertising space; save your money if you can't afford to dominate the page and pay more for position
- Use re-branding and positioning strategies
- Remember to ask for a response or an action
- Use campaigns built on emotional appeal – 'put a face on it' through:



- Student stories
- Student spokespersons
- Student outcomes

#### B. Step up promotion and personal contact

- Establish strategic alliances with businesses, higher education, and feeder schools
- Increase visibility through service in the community and participation in events
- Develop creative and bold strategic alliances and cooperative marketing programs
- Concentrate on increasing campus visits among key target markets while maintaining yield
- Encourage visits from alumni and alumni families
- Blog and Email
- Continuously revisit your search engine strategy and increase web presence
- Continuously update your mobile platform and social media strategy

#### C. Increase publicity

- Become the expert by writing column or submitting articles for publication in consumer and trade press
- Become the local 'go to' contact for education writers
- Develop a publicity plan
- Develop a photo strategy
- Schedule public service announcements
- Create placement opportunities through building relationships with local education writers/editors
- Seek article placement in trade journals read by target market segments
- Give interviews and speeches at events and through media channels

