Spotlight on Marketing: What Schools Can Learn from Business, Part 1
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By William R. Bullard

As stewards of independent schools' institutional sustainability, today's trustees are presented with increasingly complex choices in the areas of communications, marketing, and research. Do you---the board and the head of school--- understand the attitudes of both your current parents toward the school as well as the perceptions of prospective families about the school? Do you have a strong grasp on the return on investment (ROI) for your communications and marketing programs? Are you actively using data to make your resource allocation decisions? Lastly, are you aware of the school's database and marketing technologies and their level of integration?

If the answer to any of these questions is no, you may find the following insights valuable. While many independent schools have begun to see the value of marketing and research, most schools are not fully capitalizing on the potential of these programs to significantly enhance constituent satisfaction, enrollment, retention, community engagement, alumni participation, and fund-raising. Lessons from the business world can help.

School administrators and faculty are often skeptical of business's relevance to their tight-knit communities, often singling out marketing as contrary to the school culture and personal ties. However, with declining demographics, increasing competition, and other macro-economic factors already in motion, schools can greatly benefit from marketing approaches that businesses and agencies have honed during very challenging times. While trustees are rightly wary of becoming directly involved in marketing, you can better support your head of school if you are aware of the potential opportunities to use data and new marketing tools on behalf of your school. Summarized below are some of the most critical areas for your school:

- **Marketing Strategy**: Many schools have not translated their carefully conceived goals, vision, and mission well to their websites, the foundation of marketing efforts for businesses today. In addition, many schools don't communicate effectively with all their constituents, tending to focus primarily on parents. Is your school's culture clear online and in print? Does the website have a "mission," "purpose" or "values" section, and if so, does it speak to your alumni, faculty, students, past parents and grandparents, prospective students, and your local community? Have you reviewed your school's site carefully, both on a computer and mobile device, and given feedback to the head of school? The web, both on a PC/laptop and increasingly on a smartphone or tablet, is the core of your public presentation and must be closely aligned with your organizational strategy as conveyed in your school tours, printed publications, ads, brochures, and social media.

  Strategic thinking and execution are two of the key differentiators between "communications" and "marketing" resources. Often these are confused, and indeed, there is significant overlap. However, as complexity grows in private education, most schools need to move beyond basic, though essential, communications responsibilities, such as sending newsletters, informing local publications of student achievements, announcing events, and updating web pages to more

strategic marketing functions, such as highly targeted messaging, data-driven campaigns, testing, and lead generation and nurturing for enrollment and campaign integration.

- **Analytics:** Many schools have not used the tools they have at their own disposal to understand what's happening on their websites, to their search engine content, and in email, social media, and other channels. Many organizations continue to rely on intuition, or equally dangerously, habit, for their selection of positioning, marketing channels, message frequency, and revenue allocation. With rapid changes in social media, competition and demographics, what worked in the past is no guarantee of future success. Trustees can help their schools by ensuring the head is attuned to the dynamic marketing environment and is prioritizing data-driven thinking among his or her communications and marketing team.

  This means not just tracking what web pages people visit and for how long, what keywords they use in search, what topics interest them on social channels and in email, and what paths they travel after clicking on an ad. It also means understanding the implications of this behavior and the best methods to translate your constituents' actions and interests into more effective presentations. In practical terms, this could require overhauling web pages with frequent exits, creating or enhancing pages for topics of interest, updating web copy to better accommodate search engine updates, changing keywords and themes, re-positioning landing pages reached from ads, or engaging the community on different topics in social media.

- **Data management and marketing:** The ability to understand and leverage data cuts across many crucial segments of independent schools. However, while schools have been very conscious of data for enrollment and budgeting, many still rely on anecdote and precedent in their strategic planning and resource allocation. Companies have been using data-driven techniques, such as audience segmentation, targeted messaging, and large-scale trend analysis for years. Most companies have also grasped the need to integrate their databases with other key systems. Here are some data-related areas where schools can learn from business:
  - *Effective market segmentation of key current constituents:* Understanding the interests and characteristics of your current students, parents, and alumni in particular can help schools communicate with more relevance to each segment.
  - *Prospect identification:* Take your most mission-appropriate current students and families and model their characteristics, then search for those in your enrollment campaigns. The use of data-driven profiles can be used across not only academic, athletic, and economic criteria but also behavioral.
  - *Demographic trends.* Knowing birth rate, socio-economic, and immigration trends can significantly improve marketing effectiveness and long-term financial success via geographic targeting and new services, courses or sports, e.g. focusing on select states or countries for recruitment, or offering Mandarin courses,
  - *Customer relationship management (CRM):* With the advent of systems such as Salesforce.com, companies have become much more proficient at tracking basic customer activity, such as orders, conversations and requests. The "Chatter" feature expands the capabilities to capture more nuanced information about customers and employees, such as personal interests and unique skills. Schools can benefit greatly from

collecting and sharing activity and knowledge, either from expanded capabilities offered by existing database providers like Senior Systems, or new entrants.

- o *Database Integration:* Many schools, like businesses, have multiple systems or platforms for their parents/students (customers), alumni, website management, email, and analytics. In part two of this article in the April Savvy Trustee, I will discuss what trustees need to know about these databases and platforms as they relate to marketing and communications.

- **Market research:** Most successful businesses have understood the importance of listening to the customer for decades, while schools often assume they know what key constituents feel and need. Data-driven boards will ask the head to create a "research agenda" and report the results to the board to aid in strategic decision-making. While these projects can encompass all aspects of school life, most relate to marketing and communications in some way. There are many options, which in most cases need not be impersonal, technical, or expensive. Focus groups (or moderated parent meetings) are great for idea generation while surveys can quantify satisfaction or choice. Board members can remind the head of school of a basic premise: don't start a project or ask a question unless you're prepared to act on the findings. Your school can conduct moderated parent meetings for high-level discussion and build and implement (by email or direct mail) basic surveys about activities, communications, or upcoming programs. For more complex needs, such as image audits or demographic studies, the trustees will need to support the head in assessing the goals, ROI, and frequency. This is a classic case in which the institution may have to choose between using internal resources, with low costs but more limited capabilities, and outside consultants, which require an investment in return for their broader experience and research methodologies. Below is a sample "Research Agenda" for the ongoing projects.

In the April Savvy Trustee*, Part II of this article will provide additional insights on strategies, tools, and techniques that can help your school enhance its reputation, enrollment, constituent satisfaction, fund-raising, and alumni participation.*

Research Agenda: Sample Chart for Marketing-related Projects**

Research Need	Audience	Frequency	Suggested Medium	Action
Satisfaction	Current Parents	Annual	Email/online	Create benchmarks and goals. If results miss target goals, develop action plan for each critical segment.
Perception/ Awareness of School Activities	Alumni	3 years	Email; Alumni/ae publications; Annual Fund letters	Create benchmarks and goals. If results miss target goals, develop action plan for each critical segment.
Reasons for not enrolling	Accepted families who didn't enroll	Annual	Email; phone call if appropriate	Address identifiable and significant trends
Demographic profile: numbers of prospective students, race, income etc.	Your market: local, national or international	Annual	External provider	Develop action plan to manage major changes and new trends relative to School's strategy.
External Image Studies: perception of who you are and who you serve	Your market	5 years	External provider/ consultant/trained internal team members	Create benchmarks from the first study. Compare perceptions from external and internal studies for alignment. Use findings to drive marketing or make internal adjustments.
Internal Image Studies: perception of who you are and who you serve	Your internal community	5 years	External provider/ consultant/trained internal team members	See above

** Addendum to NAIS Spotlight on Marketing: What Schools Can Learn from Business, Part 1

Part II, Marketing: What Schools Can Learn From Business

Strategies to Enhance Your School's Brand for Long-Term Growth

By William R. Bullard

In part I of "Marketing: What Schools Can Learn from Business" (February 2014 *Savvy Trustee*) we offered tips for trustees to help the head of school prepare his or her school take full advantage of marketing strategy, market research, analytics, and database marketing to enhance the institution's long-term success and sustainability. In part II, we provide additional insights on strategies, tools, and techniques that can help your school enhance its reputation, enrollment, constituent satisfaction, fund-raising and alumni participation.

- **Dynamic websites and use of content:** Video is reshaping the content landscape due to rapid changes in user behavior, video technology, networks, and platforms such as YouTube, Vimeo ,and now Vine. Many businesses saw this years ago, and while some schools have caught on, others aren't using enough video and pictures to tell their story. Worried about costs? Urge your head of school to consider "crowdsourcing," the practice of getting needed services, ideas, and content from nontraditional sources, including the online community. For example, by training students to shoot video within certain guidelines, you get the action first-hand, while educating students in a critical new skill. Though more complex, you can also use this approach to involve interested parents and alumni/ae.

- **Digital marketing:** Businesses jumped on strategic use of web content, email, and, more recently, social media, to drive awareness of new products, programs, and events. While many companies still use catalogs and printed newsletters, many have rapidly migrated to online and electronic formats, hastened by the stunning growth of smartphones and tablets. Schools can benefit from accelerating the migration of some of their publications, including their viewbooks, to a digital format . Trustees will immediately grasp the economic benefits of shifting appropriate campaigns to electronic channels. Mobile marketing via mobile apps and text communications with prospective students are relatively easy to execute and inexpensive (a mobile-enabled website is critical but usually requires a site re-design). School marketing teams must also be aware of changes in search engine optimization/marketing (SEO/SEM).Google, the search leader, periodically updates its algorithms, which can significantly affect the results of a prospect's search. Previously, webmasters would tweak tags or keywords to maintain their school's rank. Now, with Hummingbird, Google's latest big release, the focus remains on high-quality, original content and inbound links from respected websites; the algorithm also acknowledges the sharp increase in mobile searches by trying to extract the searcher's intent or meaning, akin to a "conversation." The implications for content marketers are still evolving. In sum, marketing is evolving from "outbound" tactics to "inbound" strategies that earn the customers' attention through relevant and interesting content on blogs, web pages, webinars and the like, and foster engagement and amplification through social channels.

- **Campaign integration:** How can schools align their messaging across email, the web, social media, fund-raising appeals, printed publications, and other communications? This is a proven method for ensuring its positioning and messaging comes across consistently to its target audience. Unfortunately, many schools are still in "silos." For marketing purposes, this is most common when communications and development are in separate teams. Instead of sharing themes and marketing strategies, many teams work in isolation on email, social, and print programs, often leading to disconnected programs and sub-optimal marketing as development people move beyond their areas of expertise. Getting all administrators, faculty, parents, students, and alumni on the same page about your school's vision, culture, and programs will enhance the school's brand and reputation long-term.

- **Deep social engagement:** Schools have made good progress recently in having credible social media presences, with some Facebook posts and tweets that are of interest to alumni, students, and parents. However, most social content for schools, and even for many higher education institutions, is still a one-way channel, with the vast majority of the communication coming from the school. Businesses have not completely cracked the code on driving community engagement, but a few of their techniques may be instructive. Astute businesses track what topics generate the most interest and plant those seeds in appropriate social media channels; recruit external ambassadors who can advocate for the organization; use compelling graphics to stand out from the crowd; test techniques across multiple channels; dive or at least tiptoe into mobile marketing; reward engagement with fun prizes or recognition; and broaden their campaigns into Instagram, Pinterest, Foursquare, and Google+ as more young people look for alternatives to Facebook (G+ also has the advantage of enhancing the search rankings for schools' websites).

- **Lead generation and "nurture" campaigns:** Businesses have made a science of using "marketing automation" to recruit and market to prospects. The term refers to software systems that efficiently perform marketing segmentation and campaign management. Businesses have found great success in qualifying and increasing conversion rates for leads they receive from advertising, trade shows, their website, and social media by using targeted multi-touch "drip" email campaigns, tracking the reader's action, "scoring" the leads, and assessing the value of various lead sources. Most schools have a major advantage because they can handle leads personally; even so, they can ensure they're focusing on the most qualified prospects by developing "personas" (a technical way to define your top four or five market segments, often in playful categories such as "Suzy the athlete" or "well-rounded Steve") and tailor content in emails that can be sent in small batches. You can help your head of school think through the potential investment and ROI associated with a lead nurturing system. Smaller schools can help their development teams be more effective by segmenting leads, developing targeted content for each segment, and sending regular follow-ups manually. Staying in touch with prospective families on a regular basis can help "close the deal" in enrollment.

- **Testing:** Businesses and agencies, especially those that understand direct marketing techniques, are obsessed with testing key variables in virtually every medium. Schools as a whole have not tested topics, subject lines, copy content, length and tone, images, tag lines, incentives, and similar components that affect how people interact with and respond to marketing messages.

School marketers can set up basic tests in email, direct mail, banner and pay-per-click ads, Facebook posts, and websites (using A/B testing), then track with built-in analytics packages, Google Analytics, and similar tools. Testing is a critical part of strategic marketing and execution, and is an appropriate area for the board to guide your head of school if this isn't being done regularly

- **Technology platforms**: Schools are similar to businesses in having multiple database needs that require effective technology. Your school must have an efficient platform to track current family, student, alumni, and prospective family records, payments, and donations. Its course offering needs to be available online, ideally as part of an e-learning program that permits assignment submission and student collaboration. The school must also communicate to divergent constituents on many topics including ongoing newsletters, emergencies, transportation and athletic updates, news, events, and very specific programs like that third-grade field trip. Questions of platforms and databases at a high level are well beyond the scope of this article; for marketing and communications, trustees must have confidence in a long-term strategy to effectively manage communications. Most likely, this will require integrating multiple databases because there will be an increasingly high opportunity cost (people/time) to effective marketing using multiple systems; training, tracking of opt-outs (when constituents request to be removed from emails, it must be airtight), market segmentation, personalization, and consistent presentation are complex and prone to error.

- **Benchmarking:** Does your school formally benchmark itself against the leaders in its space? If not, this could be valuable guidance for the head of school. Top businesses always identify the best competitors and assess their strengths and weaknesses in a wide range of disciplines. In marketing and communications, schools should benchmark their leading peers for messaging, website navigation, content and ease-of-use, email content and frequency, social media presence, search engine effectiveness, and community feedback.

To be clear, not nearly every business is masterfully using each of these strategies and tools. However, businesses are further along in their understanding and application of increasingly sophisticated marketing capabilities. The sooner independent schools embrace appropriate marketing techniques as a way to greatly enhance their constituent satisfaction, reputation, and enrollment, the faster they will capitalize on the current "boom" years and be prepared for the challenging times ahead. As custodians of your school's institutional sustainability, trustees can play a valuable role by supporting the head of school and senior administrators with insights about the importance of data-driven decision making, the power of market research, and the tremendous opportunities offered by today's digital, social, and database technologies.