How to Create a Winning School Marketing Plan

BY STACY JAGODOWSKI

blackbaud®

"

Once I started relying on a marketing plan to drive my planning and processes, I realized just how much work I used to do that wasn't directly tied to an initiative and wasn't contributing much to achieving our goals.

Contents

INTRODUCTION

When I started my career, I was taught that a marketing plan needed to be an enterprise document that required extensive research, took weeks (if not months) to create, and needed to address over a dozen aspects of business operations and marketing strategies. It was a long, intense, and daunting process that I dreaded and avoided at all costs.

If you've never seen the traditional marketing plan outline, do an online search for one. I'm sure your search will return millions of results, some of which will be trying to sell you an elaborate template or expensive consultants to help you complete one. Undoubtedly, you'll also find numerous examples of marketing plan outlines that look something like this:

1. Executive Summary

2. The Mission

3. Differentiators/Value Proposition

4. Institutional Vision

5. Target Audience

6. Situation Analysis

   • Institution, Customer, Competitor, Collaborator, Climate

   • SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis

7. Marketing Segmentation

   • Segment 1: Descriptions, sales reports, goals and outcomes, product usage, resource requirements, outreach plan, pricing

- Segment 2: Descriptions, sales reports, goals and outcomes, product usage, resource requirements, outreach plan, pricing

8. Selected Marketing Strategies (Action Items)

- Why were these strategies chosen? Include product, price, place, promotion, and how these strategies will be completed. Discuss decision variables: brand, quality, scope, warranty, packaging, price, discounts, bundling, payment terms, distribution challenges, logistics, motivating the channel, promotion, advertising, PR, the budget for promotion, projected results.

9. Alternative Marketing Strategies

- The strategies you aren't planning to use, but considered

10. Short and Long Term Projections

- Goals and outcomes: The immediate effects of the proposed strategies, expected long-term results, and special actions required to achieve them

11. Analysis Strategies (How will you assess success?)

12. Appendix

- Calculations/data used to support the information above and reports from previous years

13. Industry Reports and Marketplace Projections

For me, just reading that outline was overwhelming and intimidating, partly because I didn't know where to start. The truth is, schools don't function in the same manner as corporations, and my department didn't actually have oversight of all aspects of a traditional marketing plan. It would have been impossible for me to do this alone, and we all know, gathering all the key leaders together to work on a project is nearly impossible.

Plus, like many marketing and communications offices at schools, mine was a small shop with giant shop workloads, and the idea of taking a few weeks (or more) to conduct research, coordinate with others, and build this comprehensive and complex document was just too much to even fathom. So, like many others, instead of trying to create a marketing plan, I just limped along without one hoping for the best. I was convinced that I hated marketing plans.

Fast forward to today, and I can't imagine working without a marketing plan, though it differs in nature from the traditional model I was taught all those years ago. I eventually realized that I don't hate marketing plans at all; what I do hate is working with a marketing plan structure that doesn't meet my organization's needs, is complex and time consuming, and provides little value to me in the long run. Who has time for that?

It took me years to figure out what I actually needed out of a marketing plan and what my organizations expected the marketing plan to cover. Once I discovered that, I realized the true value of a solid marketing plan and what it entailed.

Even better, I realized that it didn't need to be this massive enterprise document that takes weeks to create. Once I started thinking differently about marketing plans, I discovered that what I really needed was mini-marketing plans that centered around marketing and communications aspects of individual initiatives and outlined the partnerships I needed with other departments.

 Soon, I was creating documents that didn't just guide my work, but kept others informed and on track. Plus, I was better able to manage projects and avoid unnecessary work and frustration. As a bonus, I found that having an organized plan meant that I was actually promoting stronger collaborations and partnerships with the departments around me.

Once I started relying on a marketing plan to drive my planning and processes, I realized just how much work I used to do that wasn't directly tied to an initiative and wasn't contributing much to achieving our goals. It was just more noise in an already loud room, and no one was really paying attention to whether the message was getting heard. Fortunately, I found that when I shifted from tasks to strategies, I was able to be more productive and more successful.

To get to this point, I had to really dig into the reasons why the traditional marketing plan outline didn't work for me and my schools. The truth is, most schools don't fully understand marketing or how it differs from communication, public relations, or even advertising. Sure, schools are familiar with marketing terms, but they often don't truly understand what they mean within the scope of operating a business. Let's face it, schools are businesses, and families are our customers.

But, I quickly learned that the culture of our schools wasn't going to change overnight, and fortunately, we're starting to see a shift, but we're not fully there yet. The role of a marketing department at a school, which is still considered just "communications" at many, is starting to change, but it is still vastly different than in the corporate world. So, I had to alter what a marketing plan covers for my school.

To do that, I conducted research about what my role was within my organization, what my organization's expectations were out of a marketing plan, and what I truly needed out of a marketing plan. I had to go back to basics before I figured out how to improve my work.

"

It's no wonder why so many marketing plan templates aren't a great match for schools—our processes are different from many corporations.

What Is Marketing?

At its core, marketing is a high-level strategy to bring awareness to and sell a product. Another way to look at this is that marketing happens when we want prospects to take action—apply to our school, make a donation, or register for an event.

In the corporate world, typically, before the sales department gets in the game, marketing is involved in determining the "marketing mix" or, as it's also called, the "Five Ps" in relation to working with the target audience.

- **Product:** What is your business selling? What are the physical attributes of the product, or what makes your service unique? How is that product or service different from competitors', and what benefits does it provide your customer?

- **Price:** What does the product or service cost? How does that price point compare to your competition? What will your profit margin be at this price?

- **Place:** Where will you sell your product or service? This doesn't just mean a brick-and-mortar store vs. a home office; where will your customers be able to buy your product? What will your Internet marketing strategy be? Sales strategy? How will the transaction take place? What is the cost of getting the product or service to the consumer/client, and what will be your refund/return policy?

- **Promotion:** How will you let the market know about your product or services? What features and benefits will you provide to encourage them to check out what you're offering? What marketing tactics will you use, and what do you anticipate will be the results of each method? Include information about any incentives or coupons you'll use to attract business.

- **People:** This is a newer "P" added to the marketing mix, but it's an important factor to consider if other people are involved in helping you create or deliver your product or service: staffing. Which people do you need (e.g., sales people, virtual assistants), and what do they do (e.g., sales calls, customer service)? What is their level of training and/or experience required to help your business?
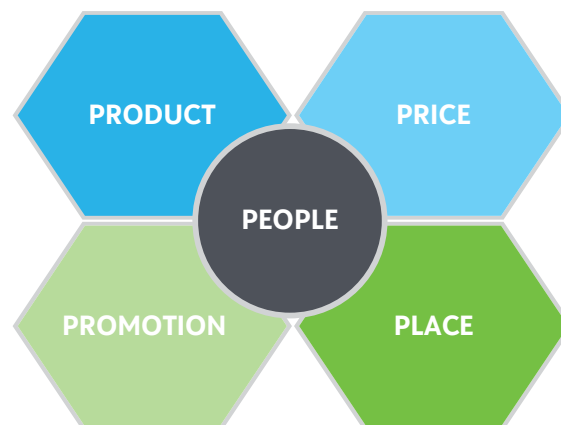
These considerations are all part of understanding the marketplace and how a business is going to deliver its product or service to customers. This is essentially what marketing departments are responsible for: understanding the audience and influencing their behavior. Marketing serves to bring awareness to the users, creating what we call leads or potential customers. From there, marketing can nurture those leads using a variety of marketing strategies to ensure that they are viable and likely to convert, and then pass them along to sales, which is then tasked with closing the deal.

· ·

As such, a marketing plan is a long-term, forward-thinking strategy designed to understand the needs of your target audience, influence their perceptions, and determine how a company can capitalize on these factors in order to support sales.

· ·

Sales strategy is often directly coming from the marketing strategy, and in organizational charts, sales and marketing are often under the same umbrella. In some cases, sales is actually considered a function of marketing.

Some corporations break it down even further to show that marketing is the umbrella over the "marketing mix" and then aspects of marketing and sales fall under the umbrella of promotion. True, the sales department isn't usually part of the marketing department, but when the two are separate, they work hand in hand when it comes to developing and carrying out marketing strategies.

We could have an entire eBook devoted to how various aspects of marketing strategy function together, but for the case of this eBook, we're going to focus on communications, branding, advertising, and sales. Many people struggle with understanding the differences between each of these strategy components, and the truth is, marketing strategy has continually grown more complex over time, so let's break it down a bit:

- **Communication** can be defined as what we say to our audiences and how we say it. That includes researching and writing marketing content for distribution via email, blogs, websites, brochures, and other print and digital media. Social media can often fall under this umbrella.

- **Branding**, according to the American Marketing Association, is "a name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers." It goes beyond just the graphics and language used by the organization and also includes how the product or service makes the user feel. It's more than just what the organization puts out. It's how the user interprets it. Products can often be copied, but branding is what makes each one unique. Consider Coca-Cola® and Pepsi® or Tide® and Gain®. These are similar products that serve the same purpose but have distinct brands.

- **Advertising** is usually the one people understand most. It's when an organization determines where to invest their money in order to reach their audience. Advertising includes developing,

producing, and implementing paid advertisements on tv, radio, papers, magazines, billboards, etc., as well as hiring talent and actors to represent the brand, such as Flo, who has become the spokesperson for Progressive®.

- **Sales** is the final component of the marketing strategy, which is where we "seal the deal." Sales departments are tasked with how to get users to buy the product. They are responsible for pitching the product to the customer, and sales sometimes has a hand in pricing services and/or packaging design.

However, in private schools, it works a bit differently. Instead of marketing strategy being led by marketing departments, they are often involved later in the decision-making and planning processes. The sales department (admission and development for schools), head of school, CFO, academic deans, and/or the board all tend to take the lead on major marketing decisions including Product, Price, Place and People, while marketing is usually only involved in sharing oversight of Place and Promotion.

Part of this difference in process stems back to the history of private schools, most of which didn't engage in marketing promotion at first; the demand for private education far exceeded the supply of available seats for many years. Early on, many heads of schools were responsible for admission and development processes.

For years, schools simply didn't need to market. In fact, for many of these private institutions, they had more demand for their business than they could manage. As such, they started expanding their operations. As they needed to field more applications, they hired more admissions people.

But eventually, the marketplace shifted. More schools emerged, creating greater competition, and existing schools had to work harder to keep enrollment up and grow in scope to stay relevant. Many schools suddenly found themselves needing to do more to fill their seats, and they grew their admissions and development offices based on the obvious immediate needs: find more students and gain more donations.

At most schools, even today, considerable resources are invested in recruiting and enrolling families, as well as raising money, but those funds are usually allocated to admissions and development offices, the sales arms of the school. Marketing and communications were late additions to these organizational structures, and while there isn't much concrete research on how or when exactly these functions came to be, most would agree that schools first started to embrace a need for communications support. The focus was on telling the story of the school, and the role of the private school communications director didn't necessarily align with that of corporate world communications directors.

As schools continued to find themselves struggling after the economic downfall in 2008, they realized that they needed to do more to be successful. As a result, a greater focus on marketing and communications arose, and marketing directors began to emerge, often as a joint title of marketing and communications. Offices were usually comprised of one person working to support the needs of two much larger departments, with growth in this area just starting to be seen.

In fact, a 2018 survey from *inspirED* revealed that 30 percent of schools still employ just one person to cover all aspects of marketing and communications, and only 15 percent of schools employ four or more marketing and communications team members, as compared to their counterparts of admissions (24 percent have five or more staff members) and development (41 percent have five or more staff members).

In many respects, schools developed in reverse from most businesses, and this reverse growth has left many departments conflicted. Not everyone truly knows what roles should be owned by what departments, as for many years, admissions and development professionals tackled many marketing and communications tasks. Plus, the late addition of marketing and communications professionals means that these positions historically haven't been part of the top-level decision making and aren't involved in all aspects of developing a traditional marketing plan and strategy.

It's no wonder why so many marketing plan templates aren't a great match for schools—our processes are different from many corporations. But that doesn't mean there isn't a solution that works for schools. We can alter a traditional marketing plan to meet the needs, and wants, of our schools.

"

A good marketing plan helps you stay on track and avoid getting sidetracked with ideas and initiatives that pop up down the line.

What Is a Marketing Plan,
and Why Is It Needed?

———

When it comes to developing a strong marketing plan for your school, you first have to understand what a marketing plan does and why you need it. A good marketing plan for a school serves as an important and strategic business document that outlines your long-term marketing strategies and tactics during a set period of time.

Our goal is to create a business document that outlines your long-term marketing strategies and tactics during a set period of time. It is designed to help you understand and influence your audience and prepare your school to capitalize on strengths. It will cover a variety of marketing-related details, such as costs, goals, and action steps and will serve as your roadmap throughout the marketing campaign.

A good marketing plan can be simple and still help you achieve your goals. It serves to identify a strategic problem that you need to solve and will outline how you'll address the problem. A good marketing plan provides a strategy and a roadmap to how you'll carry out that strategy. It also outlines how you'll gauge success and anticipates any roadblocks that may arise. Even better, a good marketing plan helps you stay on track and avoid getting sidetracked with ideas and initiatives that pop up down the line.

Too often, we get caught up in the notion of "what can we do" versus focusing on "what are we trying to accomplish." We start assigning tasks without looking at the bigger picture that includes the goal at hand and the resources available. Ask yourself one question with every new task you're asked to do: "Am I solving an appropriate problem when I'm doing this task?"

Think about it. Which situation sounds more like your school:

- **Situation 1:** We need a brochure for this event. Let's also send an email. How about we also do a postcard? Put it on Twitter®, too. Can we make a video? Wait, I love what Academy X did. Can we do this, too? We're not getting the results we want, so send another email. How about we post on Facebook® again? I don't think people know about this event, so let's send another email. Did we post it on Facebook? Maybe post again. Parent A said no one knows about this event and suggested we do this. The head of school feels like we're not making enough progress, so let's send another email. Just resend the same email a second or third time. Do we need a separate Facebook page for this? Maybe we should have . . .

- **Situation 2:** Here's a problem. How should we solve it, and how will we track its success?

A marketing plan prevents the random idea generation that tends to happen when there isn't a clear and concise approach to marketing an initiative and often calms people's nerves. It's easy to get anxious if you're not sure if you're on target or even what the target is that you're working toward, which often leads to "scope creep" on your projects.

We've all been there in a meeting when someone has a great idea, and if you don't have a solid strategy to fall back on, you can get swept up in the excitement of a new initiative that may or may not actually be working to helping you achieve your end goal. A marketing plan sets out a plan of action that you follow, and it provides ways to evaluate your success and adjust course as you're going, rather than just throwing more and more emails at your audience, which as we all know, isn't always better.

This document allows me to keep the project on track and avoid the scope creep that often comes with "great ideas" that are brought to the table throughout the year. Sometimes, you have to say "NO" to a great idea. Our marketing operations have limited resources, and there's a breaking point for even the best marketer in the world.

Not every great idea can happen at the same time, and sometimes, we have to say "no" and file great ideas away to pull out at a later time. But, we all know that sometimes it can be hard to say "no" to colleagues or supervisors who come in with "a great idea to try!"

One important justification for having a marketing plan is insurance. Once you create a marketing plan and get buy-in from those involved, you have a document that has been accepted by the powers that be, and it outlines the strategic, realistic, and purposeful approach to marketing your initiative. It gives the marketing department the power to say "no" and refer back to the agreement. A marketing plan allows you to keep the project on track and avoid the scope creep that often comes with "great ideas" that are brought to the table throughout the year.

Yes, sometimes those great ideas can be added mid-way through the plan or are a necessary adjustment if things aren't going well. But, other times, you just can't deviate course. A marketing plan includes assessment components, and because of that, you know when to augment your efforts and when to stay the course and work smarter, not harder.

"

We don't have to create one massive marketing plan that addresses all of our marketing needs at once. Instead, we can create mini-marketing plans, targeted at specific offices and initiatives.

Introducing the Simplified School-Centric Marketing Plan

Acknowledging that our decision-making processes for determining the "marketing mix" aren't going to change overnight, we can shift our mindset away from the long, formal, time-consuming, and corporate-centric marketing plan of the past. We can actually create a usable document that improves our workflow. Since marketing departments aren't typically involved in the Product, Price, or Place components of the "marketing mix," we can focus our attention on the Promotion.

When it comes to the structure of our marketing plans, we can change our perception of what a marketing plan is and focus on what it does: It provides a strategic approach to solving a problem. For schools, what we really need out of our marketing plans are five basic things:

1. Determine the specific and realistic problems we need to solve

2. Outline realistic and achievable goals and timelines

3. Develop an easily executed roadmap

4. Identify potential challenges and proposed solutions

5. Provide a way to track success

Here's another simple change: we don't have to create one massive marketing plan that addresses all of our marketing needs at once. Instead, we can create mini-marketing plans, targeted at specific offices and initiatives. Imagine what it would be like if our offices were regularly operating off of several mini-marketing plans that might include:

1. Admissions Recruitment Marketing Plan

2. Annual Fund Marketing Plan

3. Summer Camp Marketing Plan

4. Annual Gala Marketing Plan

5. Special Event Marketing Plan

Getting Started

To get started, we need to identify the goals and action items we need to address with each marketing plan. From there, we can do a simple SWOT (strengths, weaknesses, opportunities, threats) analysis. A SWOT analysis doesn't have to be a daunting experience, and if your school has conducted a recent strategic plan or accreditation, much of the information you need is right there, already. In fact, you may already know this information without doing research.

You'll also need to review last year's data so that you have a benchmark. If you have data from previous years, it's even better to review up to five years of data to determine if there are trends or get a better idea of how to predict activity for the coming year. If you don't have data for comparison, then you should commit to consistent and comprehensive data tracking this year to set a benchmark for the coming year.

In doing your SWOT analysis and outlining your solutions and action items, make sure you cover these aspects:

1. Outline your goals

2. Identify key action items and complementary action items

3. Outline a timeline of action items

4. Outline challenges and solutions

5. Outline how you'll track success

6. Develop a simple narrative document that outlines your internal approach

7. Prepare to create quarterly updates on progress with a quick report of successes to date and obstacles you're facing

8. Plan to develop a final assessment

....

If you've never created a marketing plan before, this might still seem overwhelming, but the truth is, it can actually be cathartic. Think about it—you're devoting time to reviewing what you've done in the past, embracing the successful work you've done, eliminating work that wasn't successful, and setting a plan for the future that streamlines your processes and helps you work smarter, not harder.

....

Here's how it might look.

Problem Solving with a SWOT Analysis

Our problem: We need people to attend an annual event. The approach we'll take to address the problem is to start with a SWOT analysis. We can evaluate past events to determine our needs and then move on to solutions, where we can solve the potential problems that we've identified. The

action items come next, followed by the plan for implementation and then, finally, evaluation of the event after it's done. These don't have to be massive responses; stay short and to the point while developing your marketing plan.

The SWOT Analysis

1. Annual event—an expected and easily recognized event with built-in community support (strength)

2. Annual event—been there, done that attitude (weakness)

3. Complex registration process (weakness)

4. New features this year (opportunity)

5. Expensive event that competes with another event or multiple events (threat)

As a bonus tip, you may wish to have an internal version of your SWOT analysis that includes information that's important to your workflow but shouldn't be shared with the full leadership team. For example, it's not uncommon for an event or initiative to have a weakness that is related to the school's community, such as an individual who will be a challenge to work with (get them on board, keep them on track, prevent them from spreading negative vibes, etc.) or a lack of budget resources that is a sore subject among leadership and shouldn't be brought up in mixed company.

Sometimes, we can't fully call attention to all our challenges for political reasons, but they are important in our planning processes. Once we have the SWOT analysis, we can start breaking down the individual components of our marketing plan.

Solutions and Action Items

Using the SWOT analysis, we can start to highlight solutions that we'll want to embrace along with the necessary action items.

1. Make it easy to sign up and get more information; explain the Who, What, Where, When, Why, and How (addresses SWOT 3)

2. Make the branding exciting and different but keep some easy-to-recognize elements such as, having the same event name with jazzed-up graphics (SWOT 1 and 2)

3. Tell the audience to save the date and invite them (SWOT 5, necessary action item)

4. Offer early bird discounts (SWOT 5)

5. Reorganize the event calendar to eliminate competition (SWOT 5)

6. Incentivize them to attend (addresses SWOT 4 and 5)

7. Keep them excited about the event (SWOT 4 and necessary action item)

8. Remind them to register and attend (necessary action item)

9. Earn more sponsorships to potentially offset costs of tickets (SWOT 5)

Before we get started with the full planning, we need to look at our SWOT analysis to determine who needs to play a role in the planning of this event. This step is what we call identifying our stakeholders and their responsibilities:

- **Marketing:** responsible for creative design and branding, bulk outreach (email, invitations), engaging audiences via social media, managing the projects

- **Development:** responsible for event goal setting, personal outreach, closing deals, sponsorships, managing volunteers

- **Leadership:** responsible for event goal setting, clearing obstacles (like the calendar conflicts), personal outreach, garnering general support (rallying the troops), managing expectations

Now you can work with your stakeholders to outline the overview of the event and make sure everyone is on the same page with basic details and needs. This might look something like:

The Goal (why we're doing this)
Raise $1 million, sell 500 tickets, celebrate community

The Target Audience (who we're inviting)
Current parents, alumni, sponsors

Location and Date/Time (where and when)
Off campus at Museum X on May 1 at 7:00 p.m.

Event Scope
Formal gala, seated dinner, performances, honoree, no auction

Calls to Action
Buy tickets, donate in honor of person X, attend

Outreach Strategy
A combination of print and digital outreach, strong word-of-mouth marketing

Timeline
Identify the date of the event and build an outline in reverse, spacing out the marketing touches and personal outreach (coordinate with development and volunteers)

Registration
An online registration service will be used and a phone number made available for those who need help or an alternative registration process

- Registration form requirements: Don't forget to outline what you need to collect on the

registration form early in the process; gather the number of attendees and their names, accept payment, and offer special alumni prices and early-bird pricing

Branding and Messaging

This will be a formal event, and all branding should be formal and elegant in nature; use the unique event name, tagline, logo, and URL; we'll also identify the name of the event and any unique graphical requirements

Tools

Email and social media, print invitations, signs and promotional items, website and forms

Marketing Specifics

Identifying the above components usually provides each department with enough information to go back and work on their individual action plans to support the event. For marketing, we might continue to break down the role of marketing within the event planning process by identifying our print and digital tactics that we'll use. It's often helpful to further clarify why each component is necessary, the rationale behind timing and strategy, and why we're opting not to do certain things.

For example, it's often common for those involved in event planning to request dozens of email outreach opportunities. Typically, research shows that too many emails cause people to tune out and stop responding to your emails. So, you might consider developing a rationale on why sending only five to seven emails over three months is ideal, rather than sending a dozen or more. Perhaps sponsorship emails have always performed the worst when sent to the full email list, so when outlining your needs for email touches, you might consider recommending that sponsorship outreach get segmented, and limiting the sends to these touches:

1. Save the date

2. Registration open and early bird intro

3. Early bird ending—segment only to those who haven't bought tickets

4. New features promo—part 1 (always include a "buy tickets" CTA)

5. New features promo— part 2 (always include a "buy tickets" CTA)

6. Last call to register—segment only to those who haven't bought tickets

7. Reminder of event details, see you there!

You'll also want to map out the website requirements. Will you create a landing page within your existing site or develop a microsite? Often, if your event includes an auction, a microsite is required, but a simpler event can be well served by a wonderful landing page with event details and a link to registration, provided that it is easy to find. You might also consider updating your site with:

• A detailed calendar entry that links to the registration page

- A home page button that links to the landing page

- Adding your landing page as a level two menu item

- A prominent placement within your parent portal, such as the Resource Boards found in Core or the Featured Content area

Taking the time to outline how you'll use social media is useful, but it also helps others feel confident in your plans to maximize outreach. For example, you might want to determine if you want to create a Facebook event or just use organic and boosted posts, as well as how much money you'll allocate to Facebook and other social media advertising. If you have influencers within your parent body or alumni base, you'll want to create a plan to identify these individuals, involve them in outreach, and have them help promote sponsorships and ticket sales.

To avoid the "helpful ideas" coming in and potentially derailing your workflow, generate a few examples of outreach campaigns so people feel like there's a solid plan of action to keep the information flowing.

While many of us are transitioning to a marketing strategy heavy on digital, we still need to embrace print media for some initiatives. Determining the success of print media can be a challenge, but it's not impossible. We can use UTM codes to track a source, medium, and campaign name. These specific codes are attached to the end of your original URL and work with Google® Analytics to help you better understand where searchers came from as well as what campaign directed them to you. We can also work to make sure that during the week when a print initiative is slated to hit home, we pull back on digital promotions. This helps us better estimate if a surge in traffic to the registration page and/or increase in ticket sales can be attributed to the print initiative. For an event, we might still want to have these components:

- Mailed invitation

- Signs for campus

- Flyers to handout/place at reception desks

- Promotional items to support ticket sales

- Promotional items for swag bags and gifts

Pro Tip: ➤ Since UTM codes are long and complex URLs, you might consider creating a shorter redirect.

If your event is open to the public, there's even more outreach to consider. You'll want to get the event into the media, so you'll need press releases and advertisements in targeted publications. You might even consider targeting direct mail to a specific group or demographic. You won't want to send your invitations to unengaged leads—that can be expensive—but a quick postcard with a URL to get more information could be a great way to engage leads that you can later invite. Look to see if there

are potential speaking engagements that you can book to promote the event; a local town meeting could be a great way to tell the community about the event, or you could sponsor another event and promote your event through it.

While marketing may not actually manage the volunteers, this group needs marketing support. They'll need language to use when they call or text families, flyers to hand out, posts to share on social, and event details they can share to generate excitement.

Recommendations

This brief section in a school marketing plan provides focused predictions and recommendations before the event. Outline any concerns you have about plans and procedures in advance, and explain your goals to stay within the scope, as well as the rationale behind setting benchmarks. You'll also map out the importance of data tracking and remind those involved how you'll track everything and how you'll use that information. This is your opportunity to reinforce why you're taking the time to plan in advance and why consistency and adherence to the plan are crucial to the success overall.

Getting Buy-In

You may wish to augment this detailed version of the document with a summary of these concepts and action items for leadership and stakeholders. This summary would be a simple narrative document that outlines what you created and should take no more than a few hours to compose the first time around. The document should use short paragraphs (two to three sentences) and a few bullet points to home in on the most important aspects of the document. Start with an introduction section with short paragraphs on the actual event/product/initiative, background on why the event exists, and overviews and assessments of past events.

You may also want to include the initial branding elements, including the event name, samples of creative concepts, and tagline. Including sample graphics can eliminate those last minute "I don't like that" opinions that go against the planned branding and delay processes. Getting approval early on helps you stick to your plan and prevent latecomers from throwing the design scope off track, requiring you to redo work that was already done.

From there, develop your summary of the Campaign Overview section with short paragraphs on goals, target audience, and the overall outreach strategy. You can follow this with the Marketing Outreach section, using short paragraphs outlining the registration process, digital and print marketing tactics, and volunteers.

It's often useful to create an outreach calendar, which maps out a month-by-month list of what goes out and when.

For example, you may include something like:

• Early January: Mail paper save the date, and publish live web page/registration form

• Mid-February: Send paper invitation

- And so on

Unfortunately, even those people who are involved early on change their minds, and that can throw off the scope of your project. Sometimes, it's easy to manage expectations and redirect those who are going off course, but certain people need additional convincing to stay on track. By specifically calling out the potential for this and asking your key stakeholders and leadership to acknowledge their support of this plan, you give yourself more ammunition down the road when people start wanting to go off book. While you can't always avoid some scope creep, this step can at least reduce it.

To formalize the plan, consider having your key stakeholders and leadership physically sign off on the various sections of the document, acknowledging that they have read, understood, and support the initiatives laid out. Have them initial by each section, including timelines, outreach strategies, tools, process, assessment, responsibilities, goals, and benchmarks. Then, have them sign their names on the cover of the document to solidify their support and involvement in the effort.

"

We don't want to create something that sits on a shelf and collects dust, so proper management of the plan is crucial.

Managing the Marketing Plan

One of the most important aspects of a marketing plan is that it is actually useful and easily implemented. We don't want to create something that sits on a shelf and collects dust, so proper management of the plan is crucial.

Once you have buy-in, it's time to make this plan functional, and a great way to do that is to use a project management program like Basecamp® or Trello®. Basic versions of many project management programs are free, but you may wish to invest in paid versions with more tools and flexibility.

Using the tactics and timelines sections, transfer the information to your project management tool. These tools can often be used as templates for future years, so taking the time to build it out once now can save you valuable time in the future.

Outline your tasks using to-do lists with deadlines and assign tasks to those individuals involved. You can invite users from other departments to log in and jointly manage the work. Take the time to map out all of the steps involved with each component of the plan, including the various stages of development, editing, approvals, and implementation, and then use the tool to log the progress of your work and keep everyone informed and engaged.

Bonus: Project management programs will automate reminders for you and everyone involved in the project based on the deadlines you enter, which means one less task you have to manage when it comes to carrying out the plan. Many programs will even generate activity reports, making it easy to stay on top of what has been done and what needs to be done.

Assessment: Tracking Progress and Using Data

Managing major marketing initiatives is a lot of work, and we want to make sure we're doing everything we can to work smarter, not just harder. That's why we need to assess our individual initiatives, as well as the success of our overall campaign. All of your marketing outreach contributes to the success of the initiative, and it's important to know what is giving you the most bang for your buck. Take the time to assess each initiative with analytic reviews.

Web page traffic: We'll want to see how much traffic we're sending to our web pages, and from where. We can also look at trends of how long they stay on our pages, how many repeat visits there are, and what devices our visitors are using. How successful were our online registration pages? Were they easy to use? How many people reported issues or needed alternative methods?

Pro Tip:	➤ Watch the traffic to your registration page. If you're seeing hundreds of repeat visits, but not many registrations, you might need to look at whether your registration process is functional and easy to use.

Email: Delve into the open rates, click rates, and spam complaints/unsubscribes to see how these digital touches are performing. Open rates and click rates will be incredibly important in determining how successful your emails were in supporting the initiative and determining the types of emails you send in the future. If an email didn't get great open rates, you might need to reevaluate subject lines or content; maybe our users don't care about early-bird discounts? Don't forget to look at bounce rates (how healthy is your data?) and unsubscribes/spam complaints to see if you're targeting people who are right for your event.

> **Pro Tip:** ➤ Email can also help during the promotional period by showing users who might be likely to convert into ticket sales. For our annual event example, we might cross-reference click rates on emails with the actual registrations. Many email providers tell you who clicked which links, so you can easily see who registered and who didn't. This is powerful information, as it provides an opportunity for the sales departments (development or admission) or volunteers to follow up with those who didn't convert. You can also look at open rates. Someone who has opened your email dozens of times is likely to convert, so they may be another lead to follow up on.

Social media provides similar opportunities for assessing success and encouraging conversions. What kinds of posts did people engage with most? How did social media contribute to web traffic and ticket sales?

> **Pro Tip:** ➤ During the promotional period, if we have set up a Facebook event, we can also cross-reference those who said they were "interested" or "attending" and see who actually completed the registration process. This is another opportunity to reach out to qualified leads to help convert them into registrations. We can also examine the likes and comments on our posts to see who we might need to reach out to and confirm their attendance.

We also want to look for digital trends surrounding print outreach. It's harder to track, but not impossible. Make sure that your print projects utilize the UTM codes we mentioned earlier to help you better determine their success. You can search analytics to see how much traffic was sent to that UTM code to estimate how successful your print materials are in driving people to your registration and/or event webpages.

Don't forget to assess the general buzz within your community, too. This is more qualitative in nature and harder to determine, but you can rely on volunteers and even your faculty and staff to help you figure out if people are talking about the event or if folks are still in the dark. After the event, use community buzz to gauge excitement levels and satisfaction rates.

You'll also want to look at the concrete ROI. How many tickets did you sell? How many people actually showed up? Did you make a profit? Was it more than the previous years? Perhaps the beautiful and expensive formal invitation brought in 100 registrations, the personal handwritten notes brought in 50 registrations, and the simple reminder postcard brought in 50 registrations. You can compare the costs of creation (don't forget to consider the value of your time) with the return on investment, which may help you decide what's crucial to have next year.

All this information gives you a more accurate view of traffic to your online registration to help determine how successful your project was in the end and which forms of outreach were most effective. Outline why certain initiatives were successful and if they should be carried out the same way in the future or if you see opportunities to enhance them even more for greater ROI. On the flip side, you'll also want to identify those initiatives that failed to return on their investment and determine any losses that resulted. Share recommendations to enhance the outreach that wasn't successful and determine which tactics might be eliminated based on lack of ROI. Be honest in your assessment; this is a business operation, and you need to be careful with how you spend your resources.

We often forget to consider time as a resource when determining ROI, so make sure you assess hours spent working and even time spent in meetings and having personal interactions with colleagues throughout the process. You might be surprised by how much time you spend creating, revising, and updating print and digital assets and how that impacts your ROI.

This is also your chance to identify institutional obstacles that you need to plan for next time; some of this information may need to be kept confidential within your department. Perhaps there's one stakeholder who requires 10 revisions on each piece you produced. As we learned when assessing ROI earlier, even simple revisions may seem minor, but the reality of the amount of time that goes into touching the same piece over and over can be daunting. You might also have learned that a

particular registration service wasn't up to par, or that the team struggled with consistent branding and messaging.

Assessing your marketing plan's success also gives you an opportunity to make recommendations to alter budgets, leadership, event timing, branding, and every other component of the initiative. It's important to determine what needs to change for next year early on so you have time to request additional resources if necessary.

You may want to create a table to showcase the metrics for success on your initiatives, which can be updated in the coming year to compare statistics. This information is great for setting goals in the future and gives you a chance to beat previous records. If your event was wildly more (or less) successful, you can easily look back at your marketing plan and other departmental efforts to compare what was different from previous years.

Working Smarter, Not Harder

Properly developing and implementing even a mini-marketing plan still takes time and effort, but it's time well-spent and sets you up for success in the future. Once you take the time to develop a marketing plan that meets the needs of your school and addresses what your leadership expects, you'll find yourself with a clear plan of action to guide your efforts and keep others on track.

Plus, with a marketing plan, you now have the power to really evaluate your efforts, and you can use your existing plan as a template for that event in future years. Just make sure that once your initiative is over and is still fresh in your mind, you update the recommendations based on your recap and assessment. Even better, you can now use this mini-marketing plan and adapt it for other events and initiatives within your organization. It's so much easier to work from something that exists than it is to start from scratch. Who doesn't want to work smarter, not harder?

About the Author

Inspired by her own private school experiences, Stacy Jagodowski has devoted her career as a faculty member and administrator to introducing others to the private school world. Her career has focused on institutional advancement, with five years of admissions experience and more than a decade in marketing and communications.

Stacy currently works as director of communications and marketing at Sinai Akiba Academy in Los Angeles. Prior to that, she led strategic marketing and communications teams at Cheshire Academy and Milken Community Schools; at Cheshire, her team earned award-winning recognition for its annual fund marketing programs and overall team development.

She blogs for several private school organizations and has given several webinars and podcasts about private school marketing best practices. She has also presented at national conferences, including the NAIS Annual Conference, TABS Annual Conference, NAIS TABS Global Symposium, and Blackbaud's K–12 User Conference.

About Blackbaud

Blackbaud (NASDAQ: BLKB) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, foundations, companies, education institutions, healthcare organizations, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through cloud software, services, expertise, and data intelligence. The Blackbaud portfolio is tailored to the unique needs of vertical markets, with solutions for fundraising and relationship management, marketing and engagement, financial management, grant and award management, organizational and program management, social responsibility, payment services, and analytics. Serving the industry for more than three decades, Blackbaud is headquartered in Charleston, South Carolina, and has operations in the United States, Australia, Canada, and the United Kingdom. For more information, visit www.blackbaud.com.

©February 2019, Blackbaud, Inc.