From Best Practices to Results: Assessing Your Marketing Communications Operations

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ISM’s Web Presence

[Icons for isminc.com, facebook.com/ismfanpage, Twitter.com/isminc, youtube.com/indschmgt]

About ISM

- We were founded in 1975
- We have served more than 8,445 client schools over the past 40 years
- We’re a research firm
- We’re passionate about mission
- We hold students at the center of all decision-making
- We are committed to you
Learning Objectives

- Understanding marketing communications in an innovation era
- Take ISM’s Marketing Communications Assessment™
- Reflect and Discuss
- Turn Your Findings into Action: Your Four Part Marketing Communications Plan
ISM’s defines **marketing communications** as…

how schools develop their messages and carry out integrated strategies that:

- Promote **shared values**
- Nurture **relationships** with constituents
- Build constituents’ **commitment** to and investment in the school
Some things have changed and some things have not
### Characteristics with Parent/Student Appeal

#### Characteristics with Parent Appeal

1. Safe, caring community
   - Faculty care and concern
   - Character development
   - Safety
   - Caring atmosphere
   - Individual attention

2. Valued academic outcomes
   - Quality faculty
   - Curriculum offered
   - Academic challenge

3. Values/Mission/Leadership
   - Mission/Educational philosophy
   - Leadership

#### Characteristics with Student Appeal

1. Atmosphere/Culture/Sense of Community

2. Freedom to be myself, test myself, and make choices

3. Academic challenge/preparation

4. Student-teacher relationship (support)

5. Individual attention to learning needs and stress levels

6. Fairness and structure (predictability)
## Private School Marketing Paradigm Change

<table>
<thead>
<tr>
<th>Traditional School Marketing</th>
<th>Innovation Era Marketing</th>
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</thead>
<tbody>
<tr>
<td>The school is the brand</td>
<td>The student is the brand</td>
</tr>
<tr>
<td>Parent is a passive consumer</td>
<td>Parent is an active consumer</td>
</tr>
<tr>
<td>Parent is easily satisfied</td>
<td>Parent has high expectations</td>
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<tr>
<td>Parent trusts authority</td>
<td>Parent mistrusts authority</td>
</tr>
<tr>
<td>Admission Director is the frontline storyteller</td>
<td>Social media / website messaging is the frontline storyteller</td>
</tr>
<tr>
<td>Inquiry and application are key metrics</td>
<td>Re-enrollment is key metric</td>
</tr>
<tr>
<td>Marketing a product (school &amp; curriculum)</td>
<td>Marketing an experience</td>
</tr>
<tr>
<td>Word-of-mouth drives initial inquiry</td>
<td>Word-of-mouth still drives initial inquiry</td>
</tr>
<tr>
<td>Of course they’ll come, and they’ll stay</td>
<td>They may not come, and they may not stay</td>
</tr>
<tr>
<td>One person or no-one responsible for marketing</td>
<td>Everyone is responsible for marketing</td>
</tr>
<tr>
<td>Internal marketing not critical</td>
<td>Internal marketing critical</td>
</tr>
<tr>
<td>Parents are comfortable with the status quo</td>
<td>Status quo challenges your value proposition</td>
</tr>
</tbody>
</table>
The Perfect Storm of Opportunity

1. The innovation era / adaptive technology
2. Educational paradigm change
3. The psychology of the marketplace
4. The coming generational shift
The Generations Defined

<table>
<thead>
<tr>
<th>Birth Year</th>
<th>Generation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1928 - 1945</td>
<td>The Silent Generation</td>
</tr>
<tr>
<td>1946 - 1964</td>
<td>The Boomers</td>
</tr>
<tr>
<td>1965-1980</td>
<td>The Xers</td>
</tr>
<tr>
<td>1981 - 1997</td>
<td>The Millennials</td>
</tr>
</tbody>
</table>

_Pew Research Defined Generational Groups_
Clarifying the Parameters of our Target Audience

- Millennials are now 24-38 years old
- Generation X is now 39-53 years old
- Baby Boomers are now 54-72
- Most students graduate from college at 22
- The average age of first time mothers in the U.S. is 28
- That means the average age of our kindergarten first time mom is 33, born in 1985
- The parents of alumni who are between 20-36 years of age are 48-64 years old
How mighty is the coming generational shift?

According to the “Generational Media Study,” millennials are the largest generation of young people since the baby boomers. They already spend $170 billion a year—of their own and their parents’ money.

Cara Newman, YOUNG MONEY Editor, YoungMoney.com
Opportunity: Millennial Birth Rate

9,000 babies are born every day to Millennial parents
# How the generations think about things

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Boomers</th>
<th>Xers</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Trust toward authority</strong></td>
<td>Confident in self, not authority</td>
<td>Low level of trust toward authority</td>
<td>More trust toward authority—driven by a &quot;trust, but verify&quot; orientation</td>
</tr>
<tr>
<td><strong>Their view of “the ultimate reward”</strong></td>
<td>Prestigious title; the corner office</td>
<td>Freedom, choices, agency</td>
<td>Meaningful work; a life of purpose</td>
</tr>
<tr>
<td><strong>How their parents were with them</strong></td>
<td>Parents were controlling</td>
<td>Parents were distant / occupied</td>
<td>Parents were intruding (helicopters)</td>
</tr>
<tr>
<td><strong>Views toward having children</strong></td>
<td>Boomers were thoughtful and intentional in their decision-making; their children were planned</td>
<td>Doubtful about the prospect of becoming parents, but once they did, relied heavily upon activities and experts</td>
<td>Looking forward to parenthood; in fact marriage, family, and quality of life are more important than career</td>
</tr>
</tbody>
</table>
## How the generations think about things

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<thead>
<tr>
<th>Criteria</th>
<th>Boomers</th>
<th>Xers</th>
<th>Millennials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experience as children</td>
<td>Indulged as children</td>
<td>Left to their own devices as children</td>
<td>Protected / overprotected as children</td>
</tr>
<tr>
<td>Views toward education</td>
<td>Value freedom of expression</td>
<td>Pragmatic; tell me what I have to do, and I’ll do it</td>
<td>Want to know “why” / seek accountability structures and to be a part of the conversation</td>
</tr>
<tr>
<td>Political orientation</td>
<td>Want to attack oppression</td>
<td>Apathetic and perhaps a little cynical</td>
<td>Crave community and believe there is a better way</td>
</tr>
<tr>
<td>“The big question”</td>
<td>“What does it mean?”</td>
<td>“Does it work?”</td>
<td>“How do we build it / make it happen?”</td>
</tr>
</tbody>
</table>

*Adapted from source: Cara Newman, YOUNG MONEY Editor, YoungMoney.com*
Envision where you’re going

Take a moment now to imagine some of the ways you believe your school will change over the next five years.

*If you don’t know where you’re going, how will you know when you get there?*
1. Assess  
2. Score  
3. Reflect  
4. Plan
In February 2016, ISM added Parents’ Birth Year Range (Generational Identifiers) to the Parent Satisfaction Survey.
The Second Sample

- 26 schools
- Total number surveyed: 12,969
- Total number responded: 6,819
- Response rate: 52.6%
The big question: “what level of influence does ______ have on your decision to enroll and remain enrolled?”

(on a five point scale)
How the generations stack up

Quality Factors

Atmosphere | Leadership | Faculty | Care and concern
---|---|---|---
Boomers | Xers | Millennials

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How the generations stack up

Feeling Safe Factors

- Safety and security
- Protection from negative influences
- Character development/values
- Diversity & inclusion

Factors:
- Boomers
- Xers
- Millennials
How the generations stack up

Child’s Experience Factors

- Satisfaction/enthusiasm
- Leadership opportunities
- Arts experience
- P.E./Outdoor experience
- Co-curricular experience

- Blue line: Boomers
- Red line: Xers
- Green line: Millennials

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How the generations stack up

Strategic and Logistics Factors

- Ed. Technology
- Facilities/Setting
- Proximity to home
- Siblings can attend
- Cost of attending
- Financial aid
- Word of mouth

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Preliminary Rank Analysis of Existing Data Revealed

- No difference in the top four or the bottom three factors across all three groups (Millennials, Xers, and Boomers)

- No differences of ranks of three or more positions between Xers and Boomers

- There are only ranking differences of three or more positions between Millennials and Xers on six items
Millennials rank higher than Xers on:

- Emphasis on diversity and inclusion
- Faith-based identity
- Athletics/PE program

Millennials rank lower than Xers on:

- Educational technology
- Advisory program
- Size of school

caution
TABLE ACTIVITY: Identify at least one marketing communications strategy for each generational group
What REALLY Matters in Marketing and Enrollment Management?
{How your key constituents experience your school}

- Market Position
- School Culture
- Constituent Relationships
- Students
Sphere 1: Market Position

Price, Product, Process
Purpose & Outcomes
Competitive Niche
Market Demographics
Influencing the Market

Market Position
TABLE DISCUSSION:

What is Your School Doing to Influence the Market?

What is Your School Doing that is Challenging Your Value Proposition?
Sphere 2: School Culture

- Mission Delivery
- Student Experience
- Faculty Culture
- Predictability and Support
- Growth Model & Evaluation Process
- Perceived Return on Investment
What REALLY Matters in Marketing and Enrollment Management? {How your key constituents experience your school}
Sphere 3: Constituent Relationships

- Anticipate their Needs
- Mitigate Obstacles
- Take a Personalized Approach
- Share Stories that “Prove It”

Enhanced Relationships
What’s the Goal?

To ensure that your students and families believe they are the most important people at school—that they are, in fact, the reason your school exists.
Turn to the experts…

The Power of a Common Purpose

Photo source: www.nytimes.com

Be Our Guest: Perfecting the Art of Customer Service, Disney Institute, with Theodore Kinni

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The Big Ideas

- How do you treat *your* VIPs?

- Customer service is a characteristic of professional excellence

- High expectations without protocols, processes, and accountability are merely wishes

- What are the things that most matter to your “clients” in every sector of your operation?
Put yourself in their shoes

What Do Students and Parents Need and Want?
Understand your families’ thinking about money, investment, and ROI

**Mitigating the “contract mentality”**

- Education is a business transaction
- I pay a fee for the service you provide, and you must fulfill my expectations
- The school is a service, not a partnership
- Solving problems means going high and making noise
Cultivate a “community mentality”

- Education is a partnership built around what is best for all children, including mine.
- Parents understand, support, and reinforce the school’s mission and core values at home.
- Parents partner with the school in order to provide predictability and support for their children.
- Parents have both rights and responsibilities related to the school community.
Anticipate their needs—and meet them!

- Remember when you crawled on the floor to see what your baby could see to mitigate risks?
- Customer service is about anticipating families’ needs, then preemptively seeking to meet them.
- They need us to connect with them: powerfully, consistently, and with poise, courtesy, and graciousness.

www.youtube.com
Anticipate Their Needs

- Start with the major parent outreach touchpoints
- Calendar/advanced notification; back-to-school; new family transitions; parent-teacher-student conferences; report cards/progress reports; and re-enrollment
- Then move on to the more abstract: what really matters in teaching and learning today?
- How do I prepare my child for an unknown future?
- How do I parent in this era?
Information and communication are not synonymous

“The two words ‘information’ and ‘communication’ are often used interchangeably, but they signify quite different things. Information is giving out; communication is getting through.”

Sydney J. Harris
Get Faculty on Board

- Don’t assume anything
- Promise not to waste their time
- Clearly outline what you’d like them to do
- Communicate the benefits they will enjoy
- Explore examples from their own work
- Give them practical things to do (and tools to help them do it)
- Feed them
Four key strategies to employ

- **Benefits vs. Features**—talking about not just what you do, but why what you do matters for students
- **Marketing Niche**—distinguish yourself from other schools in the market
- **Value Creation**—understand that you are largely marketing “intangibles,” and the perceived value must exceed the perceived cost (the value proposition)
- **Proactive Communication**—build a reservoir-sized relationship before any hard conversations take place
Tell teaching and learning stories that “get through”

- Understand the curricular connection
- Know and share the “why”
- Message what is transformational about the learning experience
- When possible, let the students do the talking
- Personalize your message for each family, which means you have to really know each family

Photo shared by: Carmel Academy, Greenwich, CT
Make it as easy as possible for your teachers

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Week 1</th>
<th>Week 2</th>
<th>Week 3</th>
<th>Week 4</th>
<th>Week 5</th>
<th>Week 6</th>
<th>Week 7</th>
<th>Week 8</th>
<th>Week 9</th>
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<td>✅</td>
<td>✅</td>
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<td>Kellson</td>
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<td>Angela</td>
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<td>Max</td>
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</table>
Strategies for effective parent communication

- Speak conversationally—“you/we”
- Understand less is always more
- Ask yourselves: what can we “say and show” that will make their day?
What can we say and show that will make their day?

The pride of accomplishment.
What can we say or show that will make their day?

The wonder of experiential learning.
What can we say and show that will make their day?

Spontaneous joy.
What can we say and show that will make their day?

What it means to be part of a community.
In the Academic Realm: Examine Everything

- What do you believe about students?
- What is the net impact of the schedule on students?
- What do you believe about homework?
- Do you believe balance is important? Are faculty/staff experiencing balance?
- Are you making adult-centered decisions or student-centered decisions?
- Is your program and approach seen as highly relevant for today’s students?
In the Extracurricular Realm

- Look at the implications of time, schedule, and logistics
- Communicate changes in a timely and efficient manner
- Make sure coaches, especially community coaches (non-staff members), embrace your “why”
- Do your offerings match their interests?
- Don’t forget to feed and water!
- Persistently think about how students actually experience your programs
We have to own our part in it

- Our biggest obstacle is often ourselves
- Shift from “managing/tolerating” to “leading/teaching”
- If you’re enabling inappropriate behavior, stop!
- Examine and refine your parent, student, and faculty handbooks
- Plan parent education programming around the unique learning needs of your families
- Model what a strong school-to-family partnership looks like
- Reinforce the outcomes you seek
In the Realm of Advancement

- Socialize your “Be Our Guest” mentality with your colleagues

- Integrate development and marketing communications goals with your enrollment management team goals

- Start with what you want to accomplish—and how you will know you’ve accomplished it—in all your event and engagement planning
In the Realm of the Front Office

- First impressions matter
- Adopt and enforce a “what may I do to assist you” attitude
- Own your failures: “I’m so sorry that was your experience”
- Make sure they can “get through”
- Test your phone system
- Carefully examine your school’s messaging and key operational functions:
  - faculty/staff directory
  - intuitive web navigation
  - access to tools, apps, portals
In the Leadership Realm

- It all starts with the hiring process
- **Articulate** clear customer service expectations {Disney}
- Consider it a Characteristic of Professional Excellence
- Inspect what you expect: establish and sustain a culture professional growth and evaluation
- Selectively retain faculty/staff
Remember the marketing mantra

MONEY follows PERFORMANCE when VALIDATED
Articulate a plan

Identify up to four findings from your assessment that, if made the focus of your plan, will have the highest positive impact on your marketing communications outcomes. Express them as goals, then add strategies designed to achieve them.
Present your plan

WHAT is needed
WHO will do it
WHEN will it be done
HOW MUCH will it cost
WHERE will the money come from
MEASURE success
Any Questions?