

Admission Leadership Council

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EdChanges

New Jersey - Morristown-Beard School: 4/26/19

Atlanta - Holy Innocents' Episcopal School: 5/1/19

Marketing Strategies for the New Independent School Consumer

Change Isn't Coming – It's Already Here

- Demographic
- Financial
- Competitive
- Societal
- Generational (millennials)

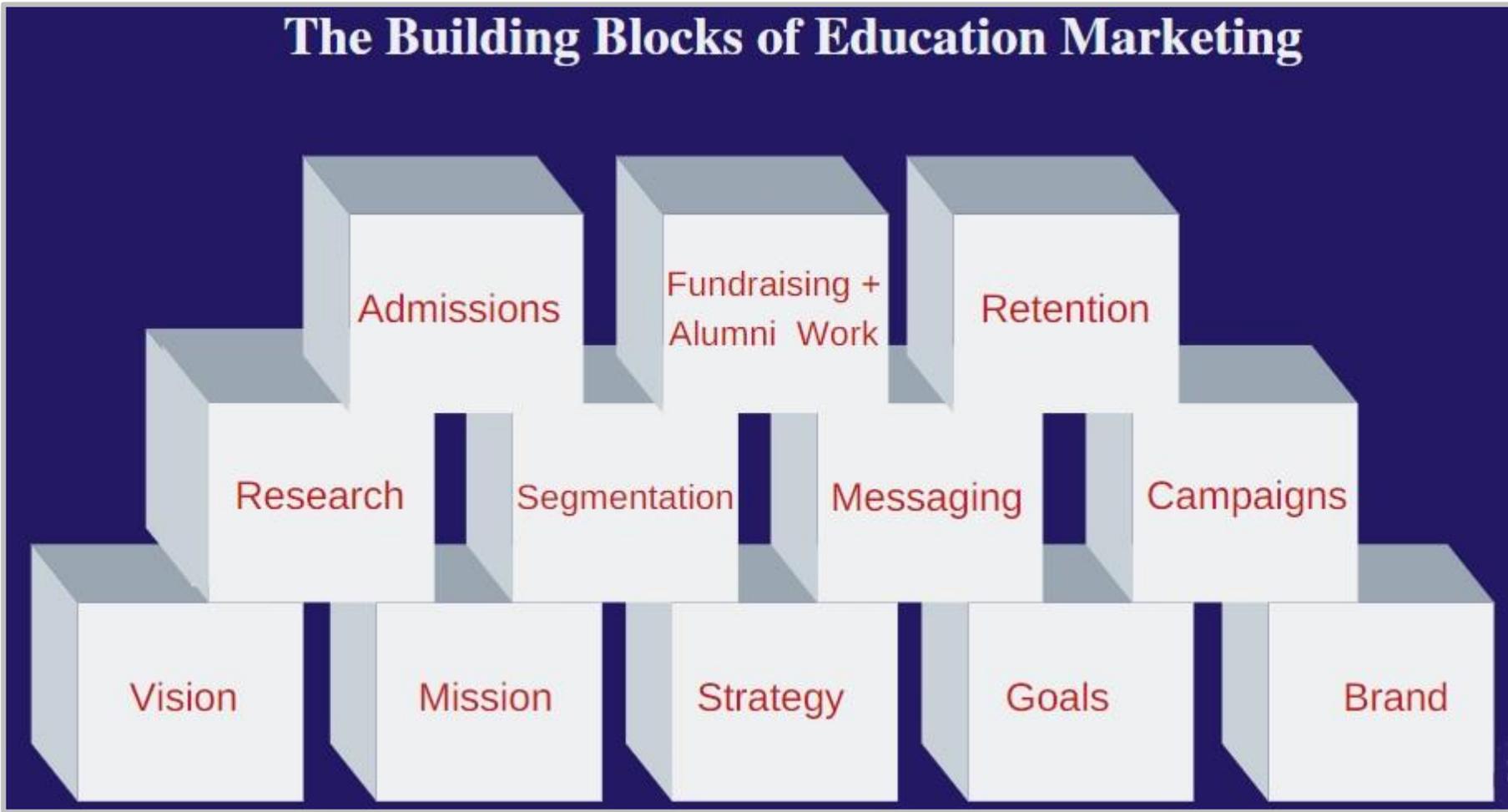


The New Independent School Consumer

- New factors driving independent school choice:
 - Parents without IS school background wonder: why are our schools better?
 - Rise of growing, lower-cost alternatives, e.g., charter, magnet, online, academically rigorous, personalized/deeper learning (SSATB), home schooling
- Increasing impact of millennials:
 - More digital, more touches, frequent updates on Susie and Joey
 - Focused on themselves and their families
 - Obsession with children's college placement at an early age.
 - Less disposable income, more focus on ROI
 - Less loyal than previous generations

The Importance of Marketing Strategy

Strategic Education Marketing



The Importance of Marketing Strategy

- Marketing strategy supports admissions, advancement, and retention
- Must “start at the bottom” to tackle high-level goals
 - Build up, from vision and mission to strategy, goals, and brand
- Layer on research, segmentation, messaging, campaigns
- Discuss with leaders of admissions, advancement/fundraising/alumna/ae and retention (if available)
- It is hard work and often doesn't get done



Marketing Strategy and Enrollment

- Does your school have a vision and mission? Do you know it?
- Crucial that all teams buy into the same strategy and message
- Requires integration among HoS, admissions, advancement, comm.
- Are your student tour guides trained in messaging?
 - Gain broad community agreement on key branding & cultural points (EdwardsCo.)
- Are your teachers trained with strategies and points of emphasis?
 - Ideally all senior leaders and others with external contacts receive similar training
- Does the marketing and communications plan reflect alignment?

Evolution: Admission to Enrollment Management

Admissions

- Admissions focus
- Day-to-day
- Partly strategic
- Habit-based planning
- Gut feel, standard reporting

Enrollment Management

- Student experience lifecycle: Recruitment-enrollment-retention
- Long-term
- Highly strategic
- Requires strategic marketing plan
- Analytical, ROI-based

Data-Driven Marketing

Data-Driven Marketing Is Here to Stay

“Using available data and information to assess the effects of marketing strategy and programs on consumer interest, actions, and opinions – and reshaping your campaigns based on your findings.”

- The evolution of data and transition to digital channels
- Improvements to analytics tools, database enhancements
- Societal changes – Google, pro sports, and much more!
- Personalization
- Predictive analytics

Bottom line - you can't afford not to!

We Are Data-Driven Consumers

- To compare shopping prices/specials, you're using data
- Review sites: how many 5s and 1s
- College rankings
- Investments: historical returns and more
- Home choices: lot size, house size, proximity to other houses
- And countless more examples...



Data-Driven Marketing and the “Big Three”

Relevant data is almost always found in marketing activities affecting a school’s pillars of sustainability:

- Attracting talented new students
- Keeping current families happy
- Raising funds from diverse segments of constituents



Data-Driven Marketing Will Increase Your Success

- Provide information of the greatest value to your constituents
- Understand what drives interest and engagement
- Help you choose one marketing medium vs. another
- Increase applications and yield rate
- Increase marketing success and improve ROI in spending & resources
- Raise more money at a lower cost
- Retain a higher percentage of students



Data Can/Has Inspired These Actions

- Rethink your marketing strategy, tactics, prospect selection, and topics
 - Example: Sewickley dropping open houses
- Change your messaging
- Update your marketing mix
 - Whitfield School shifts spending toward social media ads
- Enhance navigation, improve mobile presentation, other web changes
- Include videos or images in your social media activity
- Add or restructure key programs if they impair progress



Data Myth-Busting: Beyond the Numbers

- Perception - data is numbers, e.g.:
 - Email click rates
 - Website visits
 - Number of online gifts
 - Social media shares, comments, likes
- Reality - data include much more:
 - Each prospect's demographics and psychographics
 - Each student's extra-curricular interests
 - Path through the admissions funnel
 - Best keywords for digital ads and SEO
 - And MANY more



Data Can Improve Enrollment

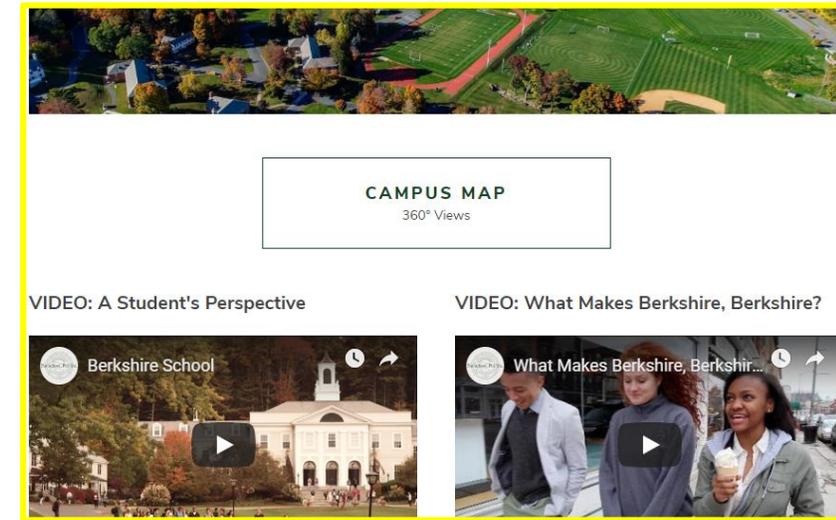
Does This Get Your Attention?

Prospective Family Matching/Tracking

- Select ideal prospects: data mining with psycho- and demographic research
 - Market profiles to match your best families on education, home values, equity, disposable income, charitable contributions plus interests in arts, athletics, and social welfare (top of the cap to Mike Connor)
 - Facebook – Lookalike Audiences
- Track opportunities
 - Assessing frequency and channel of the prospect's engagement
 - Email activity, requesting info from forms or mail pieces; acceptance to open house
- Analyze recruiting sources – what produces better clicks and leads

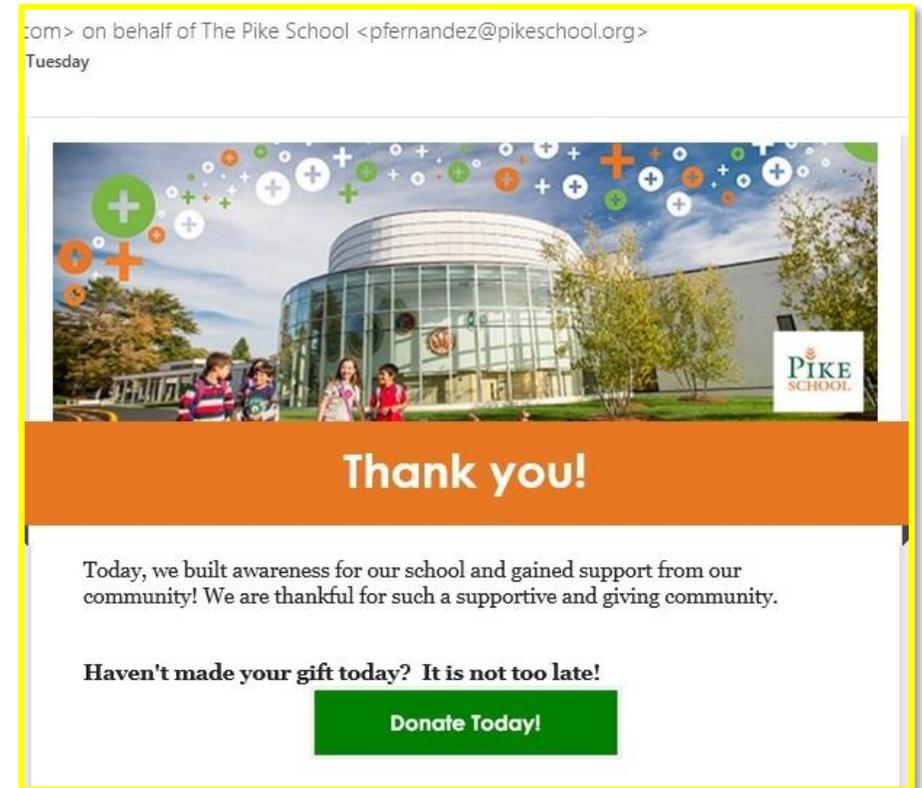
Five Ways to Use Data

- Track activity within the admissions funnel
- Test video for admissions pages: location, length, approach
- Test new channels, e.g. texting
- Survey accepted families who do not enroll
- Creating strategy and personas for lead nurturing
 - Develop ways to enhance engagement with targeted messages
 - Using technology or creativity to target scientists, athletes, actors, community activists, or similar distinct groups



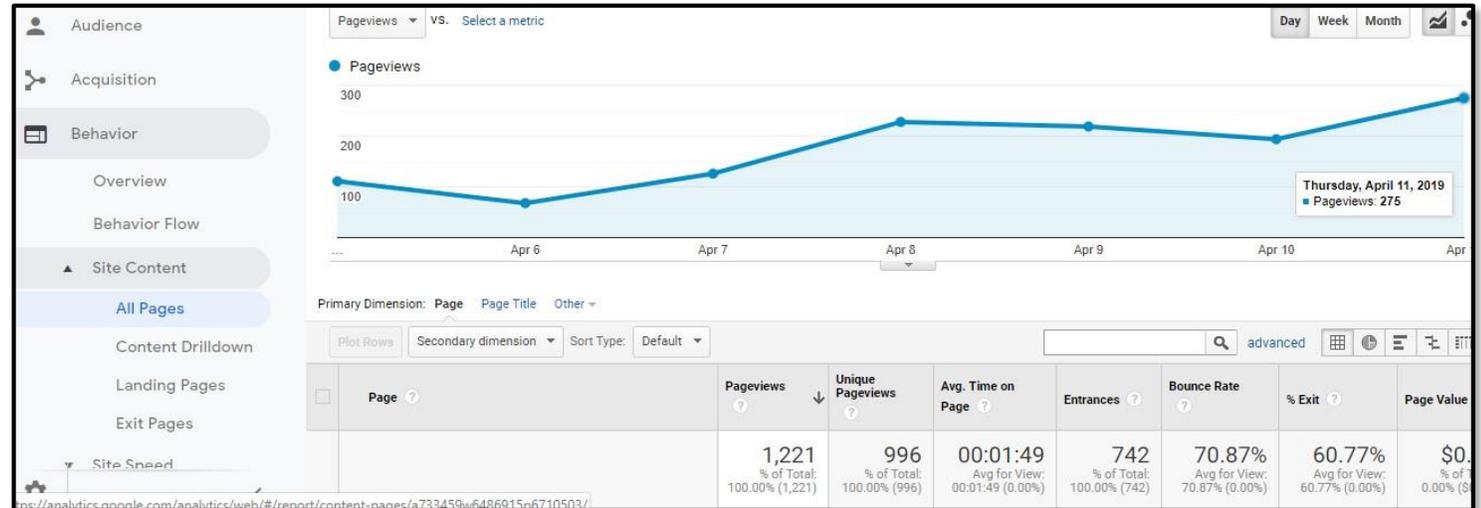
Email Data: What to Track

- Open rates
- Click-throughs
- What topics are of interest
- Subject lines, e.g., length – test!
- Copy tone and length
- Use of video
- Optimal timing of delivery, opt-outs, and many more



Website Data Tracking

- Page views
- Visits
- Unique visitors
- Time on page
- Path tracking
 - Where do families enter – and depart – your site?
- Use of images, videos, content style, and many more
- The effects of inbound marketing – from content, SEO, more



Direct (Print) Mail Campaigns

- Direct mail declining but still viable for many purposes
 - Good for high-potential prospects who merit investment
 - 10 – 30 X higher response than email (DMA)
 - Fundraising, especially older donors and prospects
- Multi-channel campaigns (direct mail-email-print-web-ads)
- Can drive response to calls-to-action:
 - Registrations, donations, inquiries
- Permits strong personalization
- Crucial strategic need: finding the right constituents to invest in
- Add vanity URLs and custom phone numbers for tracking
- Track action taken, URLs clicked, phone calls, ROI



Digital Advertising

- Several ad types
 - Size
 - Placement
- Clicks
- Path tracking
- Activity after click
- Response to calls-to-action and ROI if available



Boston NEWS ▾ RESTAURANTS WELLNESS ▾ LIFE & STYLE ▾ HOME & PROPERTY ▾



Bay Farm Montessori Academy

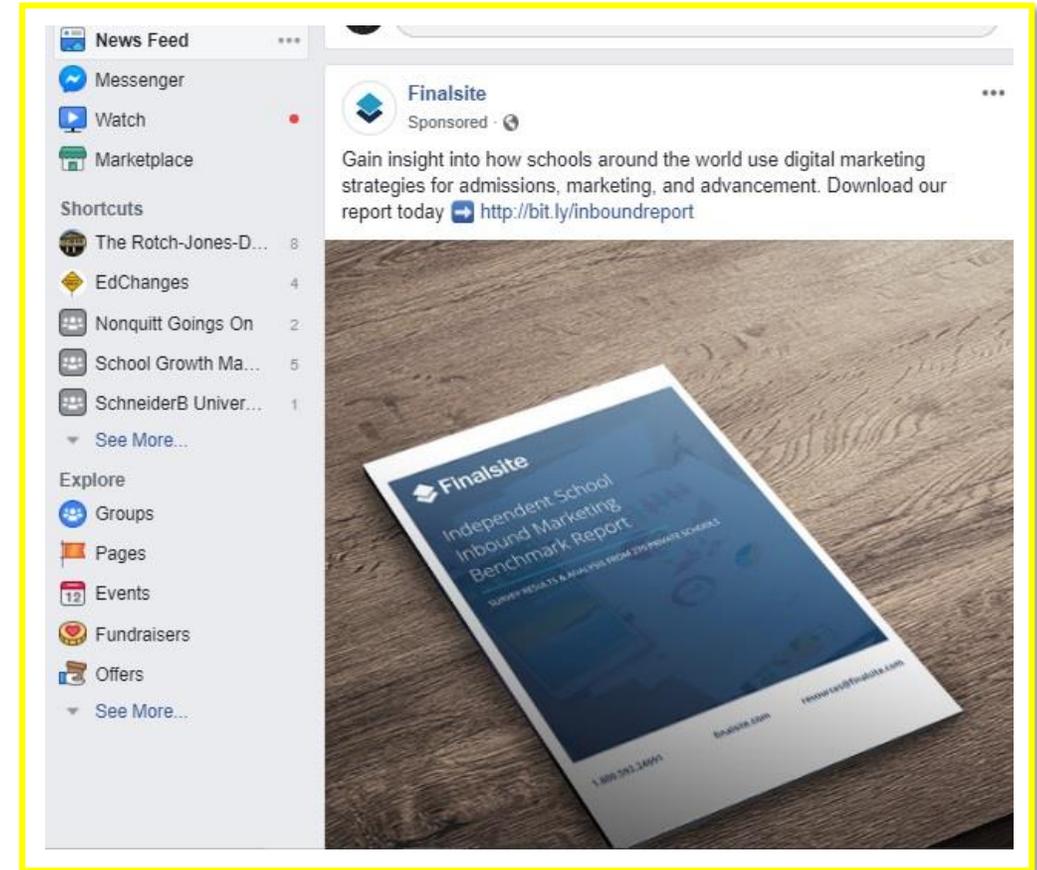
At Bay Farm Montessori Academy, learning means exploration. Children discover that learning itself is fun from their very first days. Educating

Print Advertising

- Many ad types, sizes, and objectives, ranging from:
 - High-end magazines to local newspapers
 - Branding and awareness to open houses and applications
- Do not use print ads out of habit:
 - Ensure the audience fits your target market and goals
- Print ads historically work best in multi-channel campaigns
 - Higher impact when integrated with web content, email, digital ads, direct mail
- Results and positive ROI are not guaranteed, so:
 - TEST effectiveness vs. other print ads and digital alternatives
 - Track response with distinct URLs and phone numbers

Social Media Posts and Ads

- Views
- Retweets
- Comments
- Shares
- Likes
- Use of images
- Use and effects of videos
- For ads, track clicks, other engagement, ROI



Blog Posts

- Page views
- Comments
- Social media effects
- Shares
- Other engagement
- Compare engagement across channels, e.g. email, web, social

Helping Students with Professional Performance Goals



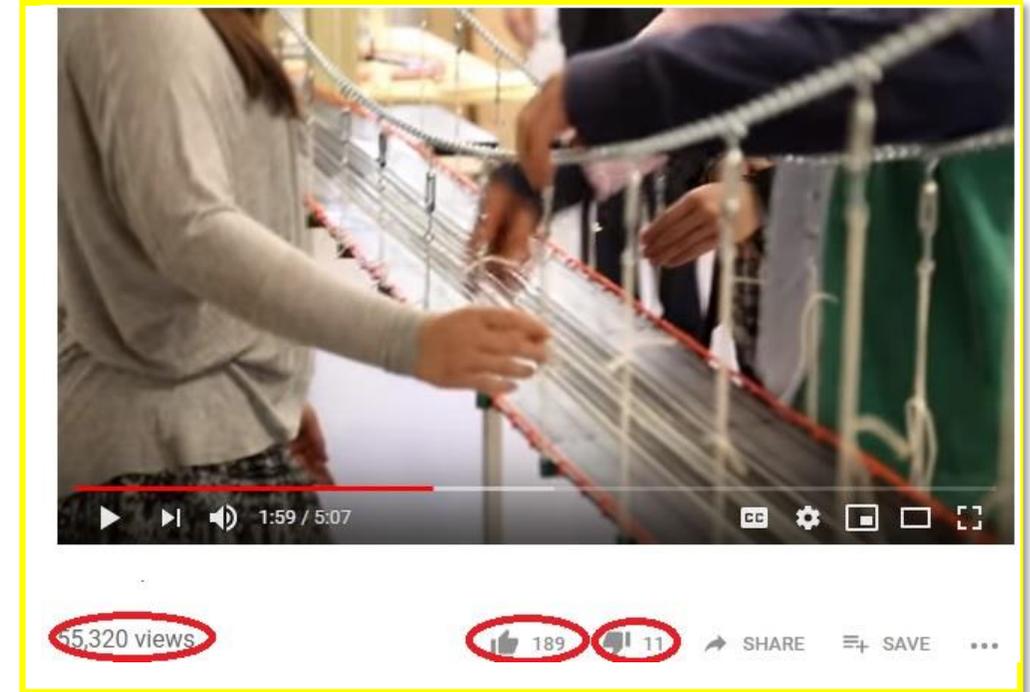
January 17 2018

[Tweet](#) [Like 0](#) [Share](#)

Many talented young people who have the opportunity to begin their careers early or to compete at a high level find that their school performance suffers, even though they may be very capable students.

Video on YouTube or Vimeo

- Views
- Likes
- Comments
- Average time watched
- Percent watching complete video
- Data from your website versus social channels



Market Research

- Parent and alumni survey responses
 - Satisfaction, new ideas, enhancements
- Focus group findings
- Image audits
- Lessons from studies of parents who don't re-enroll
- Close connection to brand and mission
- Predictive modeling offers research data and targeted lists



Social Influence

Testimonials/WOM/Influencers/Review Sites

- Where are these most effective?
- In what medium: social media, hosting parent events, web, email
 - Authenticity is imperative
 - Doing video yet?
- Direct effects on enrollment and/or retention available
- Do you have a distinct influencer program?
 - Parents groups and select alum can contribute
- Do you track these newer channels?
- Do you manage your presence on review sites? Encourage parent reviews?



Personalization

Personalization

“Customizing a unique message to each individual in a group based on that person’s specific actions, responses, attitudes, demographic characteristics, or other distinctive traits.”

Examples of Personalization

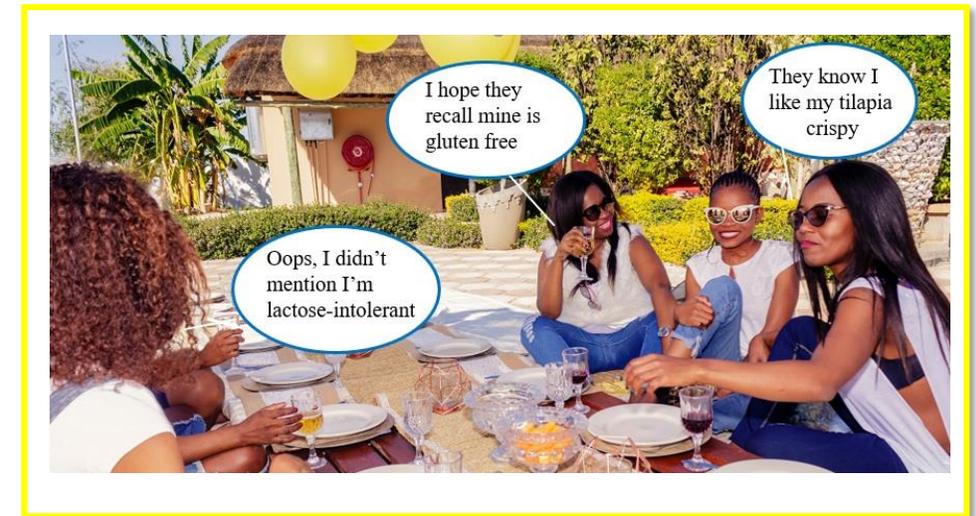
Most of us take the following and other personal services for granted:

- Targeted shopping, cross-selling, and up-selling:
 - Amazon and its transformative model
- Customized music, video, news, and more:
 - Spotify and Pandora drive “individual radio stations”...
 - ...Led to Alexi, Siri, and Google Home
 - Based on your choices and those of people with similar tastes
- The Google ecosystem, SEO, and social media algorithms:
 - Integrated maps, targeted search results, Facebook-dictated results



Personalization

- Medical:
 - Cured by your own genes
- Restaurants and hospitality:
 - Hyper-personal coffees - grande iced, sugar-free, vanilla latte with soy milk
 - Some of the first loyalty programs
- Manufacturing:
 - Gillette 3D printing creates custom razors
- Automotive:
 - AI-driven “smart manufacturing” drives custom cars and more



Effects of Personalization on Society

The U.S. is an aggregation of disparate individual statements:

- Ketogenic, lectin-free, and dozens of other diets
- Burgeoning gender definitions (did you know Facebook offers 58 choices?)
- At least 16 major types of yoga, and dozens more examples
- Millennials, soon to be the U.S.'s largest generation, were raised in the digital age and are renowned for their proclivity for web and mobile, alert-based communications, and deep personalization

Use Personalization in Your Enrollment & Marketing

Personalization can deliver a statistically significant improvement in results!

Personalize EMAIL

- One of the first media to go personal, initially with name fields and then variable content, email continues to defy the dire predictions of its demise at the hands of mobile technology and apps
- Offer your constituents unique copy, images, rewards, or activity-based triggers
- Email is the crucial medium in one of personalization's crown jewels, lead nurturing (covered shortly)

Personalize WEBSITE

- Businesses personalize features based on a person's location, web pages visited, demographic and psychographic profile, replies to surveys, site visits and more
- These dynamics have changed the web user's experience, from vastly increased conversions and sales to modest website messaging
- This technology is gradually moving into education marketing, as many higher ed web providers expand personalization and school innovator Finalsite now offers personal elements based on location and language

Personalize DIRECT MAIL

- Direct mail can be personalized in two major ways:
 - By the audience you target
 - By the messaging you use
- Customized for over 50 years, sophistication has grown with smart networks and powerful database capabilities
- Now list rental companies provide a wide range of demographic and sociographic data, so personalization options are nearly limitless
- In the messaging side, you can personalize the name, areas of interest, donation history, location, and many other variables
- Caveat: in your targeting, choose a method that fits your or your agency's budget and strategic capabilities, as the complexity can grow quickly

Personalize RE-TARGETED ADS

- Definition: visitors to a website see ads for that organization when they visit select other sites
- Meteoric rise of ad exchanges has made behavioral retargeting ubiquitous
- Evolving from a niche service that evoked fear to one that provides near-instant conveyance of our interests and shopping targets
- Retargeting offers advertisers visibility to highly targeted shoppers and by most analyses, much better ROI than traditional digital ads
- Increasingly popular in educational digital marketing despite the cost



Personalize SOCIAL MEDIA

- Understanding your audience is the first step to personalization
- Basic data available on demographics, location of your followers, and more on major social channels
- Topics with the most engagement tell you what content is most compelling to your constituents
- For one-to-one experience, respond to individual engagement on your social feeds, with a thank you, answer, or follow-up question, and enhance the profile of the social user's interest along with the offline data

Personalize FACEBOOK ADS

- 2.3 billion active monthly users + treasure trove of personal data = powerhouse advertiser
- Ads have become ubiquitous in education marketing, in great part for their targeting capabilities
- They offer substantial list selection criteria (such as “lookalike audiences” to mirror your best constituents) and low budget minimums.
- Seems poised to remain an ad giant in education and business despite privacy concerns.

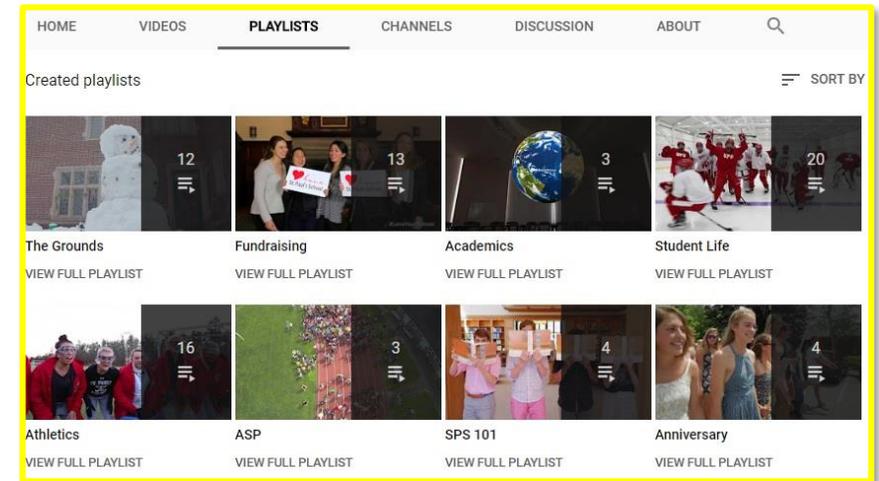
Personalize TEXTING

- Relatively gradual increase in usage
- Still systematically utilized primarily in higher ed versus independent schools
- Despite issues with opt-ins requirements, the ability to tailor messages to a prospective family on topics from education to arts to dorm life can be extraordinarily powerful
- Blackbaud, SchoolCast, other providers



Personalize VIDEO CONTENT

- Are your videos stored on YouTube or Vimeo as well as on your website?
- Break those into playlists on YouTube and consider how each playlist can create interest and fuel some personal communications, in newsletters or post-applicant communication
- Use powerful, relevant keywords and tags in your descriptions, to ensure your videos, like your web pages, rank higher and begin to appear in the “up next” right column
 - YouTube will create that personalized effect once you gain more visibility of your videos



Personalize LEAD NURTURING

“Communicating in increasingly personal terms with a prospect based on his or her demographic and psychographic data, survey responses, web activity, and other factors.”

- Vast majority of lead nurturing today requires a marketing automation system (Salesforce.com for business, Hobson’s for higher ed, Hubspot (limited) for schools)
- Collect more data on each interaction and build a person’s profile or “persona.”
- Allows school/company to email each person with increasingly targeted messages
- In business, nurturing has shown significant increases in key metrics in the “sales funnel,” with distinct similarities to the “admissions funnel.”
- “Manual” lead nurturing also possible for small schools

Parents Notice When Communications Are Not Personal

“The schools that became our top two choices were the schools that took the time to tailor their communication and our visits to my daughter's interests. Asking which foreign language would be most useful to observe on a visit day, or which type of art class (music, drama or visual) made those visits so much richer. Some of the schools --while they were quite attractive to us-- never seemed to know or try to learn who my daughter was beyond a name/form.”

EMA's 2017 parent survey,
“The Ride to Independent School”

Parents Notice When It's Not Personal

“Great communication and assistance before and leading up to applying; once we applied and submitted SSAT scores, the positive communication and contact ended. Follow-up and assistance stopped, bare minimum communication, no assistance with final decisions/options.”

EMA's 2017 Family Survey,
“The Ride to Independent School”

Personalization Matters to Families

“The school my son ultimately committed to made wonderful positive touchpoints along the way through the interview stage, revisit day, emails from student tour representatives multiple times, etc. He felt very attended to throughout the process and we both felt that the school really wanted him as a student and as a gifted musical talent that would help further their arts program.”

EMA 2017 Family Survey,
“The Ride to Independent School”



Connecting with Your Families



Overarching Themes

- **Change**
 - Society
 - The school world
 - The role of admissions – er, enrollment
 - The independent school consumer
 - The role of habit
- **Data**
 - Accessibility
 - Targeting
 - Analytics
- **Marketing**
 - Capabilities
 - Technology
 - Personalization

Take-Aways for Your School

Marketing Best Practices

- Ensure you have a marketing strategy aligned across your key areas
 - Meet with your communications, advancement and admin teams to discuss
 - Ideally engage your Head of School for ideas and communications
- Use existing data to understand your marketing situation
 - Perform a communications audit or use an outside firm to do so
 - Be sure to assess alignment of themes and messaging across all your channels
 - Survey current families, prospective families, faculty

Take-Aways for Your School (cont.)

- Explore new ways to leverage data for your marketing programs:
 - Test in many channels
 - Use ROI to dictate budget allocation
 - Define two distinct data-related goals each year
 - Dive into data-driven marketing over the summer
- Consider the opportunities and benefits of personalization
 - Assess each channel noted in this presentation
 - Tackle low-hanging fruit such as personalized emails and letters
 - Consider a simple nurturing approach at first, e.g., manual for post-inquiry emails
 - Interact personally with key social media participants

Thank You!

- Connect with me to discuss education marketing, see leading-edge content, or discuss your school's education marketing needs:
 - * LinkedIn: search for “William Bullard EdChanges”
 - * Twitter: “@wrbullard”
 - * Facebook: follow “EdChanges”
 - * Email: wrbullard@edchanges.com
 - * Phone: 410-456-7230

Take-Home Exercise

On your handout are instructions for a “before” and “after” review of your enrollment marketing channels.
Please complete it – it will help you and the EMA!

Questions and Comments

