



# About the Independent School Executive Forum

Who We Are, And How We Work With Members

Independent School Executive  
Forum

# Education Advisory Board (EAB)



Launched in 2007, EAB strives to provide the unique insight, collaboration opportunities, and expert advice needed to help make higher education smarter.

## WHO WE ARE

## WHO WE SERVE

**650+**

researchers, consultants,  
and technologists on staff

**1,000+**

colleges and universities  
across North America

**26,000+**

academic and administrator  
leaders supported

**78%**

of US undergrads attend  
EAB member institutions

## WHAT WE DO

### RESEARCH AND INSIGHTS

Research Forum Memberships offer strategic insights and actionable practices, as well as tools and expert advice to help with their implementation.

#### Our Research Forums:

- » Academic Affairs Forum
- » Business Affairs Forum
- » Student Affairs Forum
- » Continuing and Online Education Forum
- » Enrollment Management Forum
- » Advancement Forum
- » IT Forum
- » Facilities Forum
- » Community College Executive Forum
- » **Independent School Executive Forum**
- » University Systems Forum

### TECHNOLOGY COLLABORATIVES

We provide web-based software with dedicated support to help members install technology-based best practices. Bringing hundreds of institutions together to collaborate around a common platform facilitates the sharing of lessons and generation of new insights.

#### Our Areas of Focus:

- » Academic and career advising
- » Student retention and graduation
- » Student registration and course planning
- » University procurement

### DATA AND ANALYTICS

Our data scientists take disparate and disconnected member datasets, apply world class analytics and industry understanding, and provide members with insight into their own performance, as well as performance relative to peer institutions.

#### Our Areas of Focus:

- » Academic costs and efficiency
- » Faculty workload and time allocation
- » Academic program performance
- » Enrollment capacity and growth
- » University supply costs and pricing

### MANAGED SERVICES

With our 2015 acquisition of Royall & Company, the industry leader in strategic enrollment management and advancement services, EAB now partners with members to help grow undergraduate and graduate enrollments, manage financial aid, and increase alumni giving.

#### Our Areas of Focus:

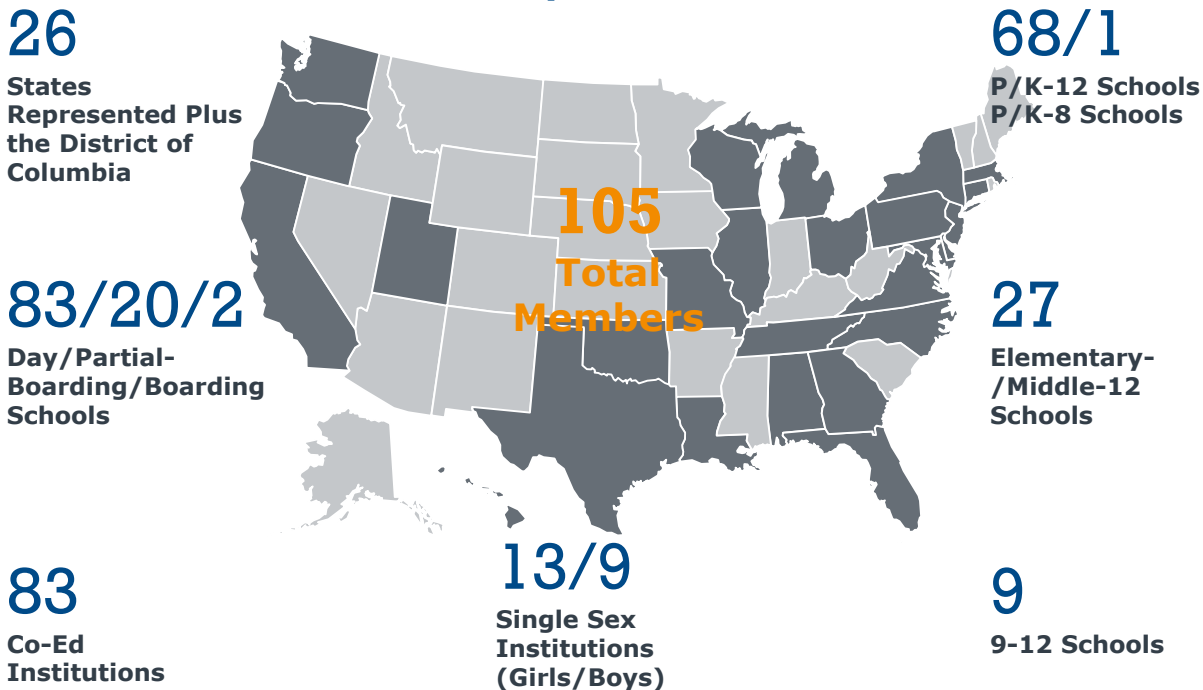
- » Undergraduate recruitment
- » Graduate recruitment
- » Financial aid optimization
- » Alumni participation

# Independent School Executive Forum



Members as of April 2018

## Membership-at-a-Glance





# How We Conduct Research

## Our Methodology for Identifying Breakthrough Practice

### Beyond Averages

EAB research focuses on answering one question: “How have successful organizations anywhere solved the pressing problems facing our members?” To that end, our analysts and consultants are dedicated to finding the most progressive and successful practices.

### 100,000+ Interviews, across Education and Beyond

Across the firm, our staff completes more than 100,000 in-depth interviews each year, probing for innovative new ideas, tactics, and strategies worthy of member time and attention.

### Actionable Advice

Rather than simply reporting what we found in the research, our provide detailed recommendations on what to do (and not to do) as well as detailed advice on practice implementation.

## How We Conduct a Study

### Literature Review and Expert Interviews

A literature review and interviews with all relevant experts provide a deeper understanding of root cause problems and help identify new ideas.



### Exhaustive Screening for Breakthrough Practice

Interviews are conducted with key stakeholders at independent schools across the country to isolate the few dozen that have pioneered truly innovative practices and can show demonstrable results.



### In-Depth Case Study Research

Multi-day interviews and onsite are completed with these institutions to understand how the practices work and the implementation requirements, benefits, and potential drawbacks.



### Rigorous Analysis and Recommendations

The research team spends several months synthesizing the research and preparing detailed recommendations to guide members in how to implement the practices and strategies uncovered in the research.

# Independent School Executive Forum Research



Research Available to All Member Schools

## 2016 Research

### Ensuring Independent School Financial Sustainability



Prescribes tactics to promote fiscal sustainability through six key financial levers

### Tackling the Student Stress Dilemma



Presents actionable approaches to address the challenge of student stress and mental wellness

### Winning Donor Mindshare in the Attention Economy



Introduces practices to engage young alumni donors, build giving habits across the donor pool

### Expanding the Enrollment Funnel



Guides efforts to communicate value to new mission-aligned families; provides funnel expansion tactics

### Keeping Faculty at the Leading Edge



Provides tested strategies to ensure best-in-class pedagogy, faculty performance



# Expanding the Enrollment Funnel

Best Marketing and Communication Strategies  
to Enhance the Prospect Pool

Independent School Executive Forum

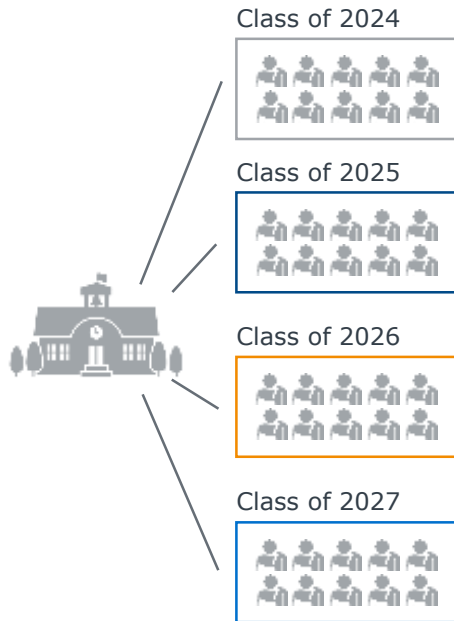
## Preparing for Our Conversations

To set the stage for this afternoon's discussion, consider your school's current enrollment situation.


If you could improve that situation in one way, what would you improve?

# Admissions Goal: Seat the Best Class

Sustained Excellence Depends on Meeting Enrollment Goals (Year After Year)



## Qualities of Ideal Independent School Class

|   |   |   |
|---|---|---|
|  | <b>Academically strong students</b>         |  |
|  | <b>Talented athletes, artists</b>           |  |
|  | <b>Diverse</b>                              |  |
|  | <b>Fits with school mission</b>             |  |
|  | <b>Full-pay students to support revenue</b> |  |



# Meeting Goals Easier with Larger Pool of Prospects



## Independent School Student Pool



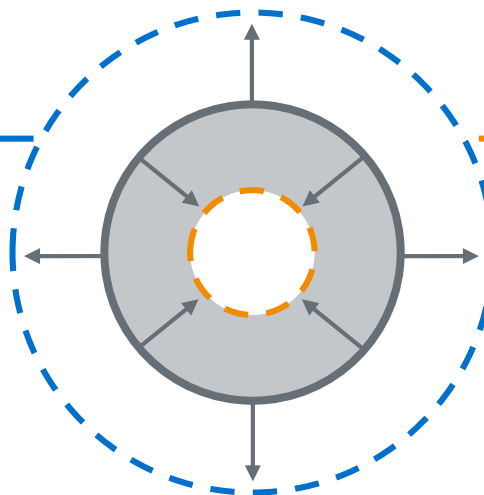
### Strong/Growing Pool

- ✓ Academically strong
- ✓ Talented athletes, artists
- ✓ Diverse
- ✓ Fits with school mission
- ✓ Full pay students to support revenue



### Weak/Declining Pool

- ✓ Academically strong
- ☐ Talented athletes, artists
- ☐ Diverse
- ☐ Fits with school mission
- ✓ Full pay students to support revenue



### A Larger Pool Means...

- Surplus of applicants makes it **easy to find enough ideal students to fill class**
- Admitted students likely to **meet most or all desired qualifications**

### A Smaller Pool Means...

- Contracting applicant pool leaves **gaps in student body**
- Admitted and waitlisted students **unlikely to meet all talent, diversity, revenue expectations**

# Not Firing on All Cylinders

## Current-Day Enrollment Realities in Your Words

### Weakening Student Quality

*"For the last couple of years, there weren't many kids on our waitlist that I was excited to admit."*

*Director of Admissions  
Mid-Atlantic Day School*



### Farther from Mission

*"If we can't attract a full, diverse class, we can't honestly say we are pursuing our founders' mission."*

*Director of Admissions  
New England Day School*

### Fewer Full-Pay Families

*"We can choose to either meet our class composition goals or our tuition revenue goals. There aren't enough full-pay families to do both."*

*Head of School  
Pacific West Day School*

### Softening Enrollments

*"We need to reverse the downward trend in our lower school. It's the most reliable feeder into our upper school. The clock is ticking."*

*Head of School  
Southern Day School*

# Finances, Competition Strain Prospect Pool



## Families Seek Best Value in the Face of Tuition Growth



### Increase in Tuition

**Median day school tuition increased 71%** from 1994 to 2017, adjusted for inflation

- Tuition increases reduce market to top few percent of earners
- Skepticism leads even wealthy families to question value



### K-12 Education Alternatives

Magnet, charter, alternative schools present **more high quality, affordable options nationwide**

- Public, charter, parochial schools increasingly viewed as viable alternative for high-income families
- Upstart challengers offer different-in-kind educational experience

# Tuition Affordable Only to Wealthiest Families

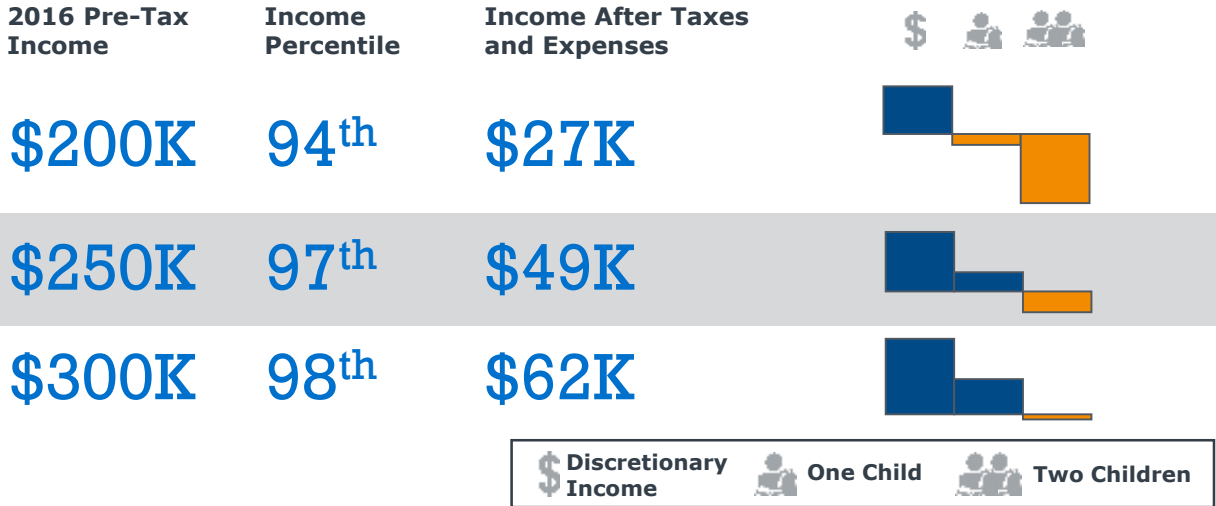
Years of Price Increases Reduce Full-Pay Family Numbers

**Decade of Tuition Increases Outpaces Even Wealthy Family Income Growth...**

**57.5%** Median day school tuition growth, 2007-2017

**29.4%** Median income growth of 95<sup>th</sup> percentile, 2007-2017

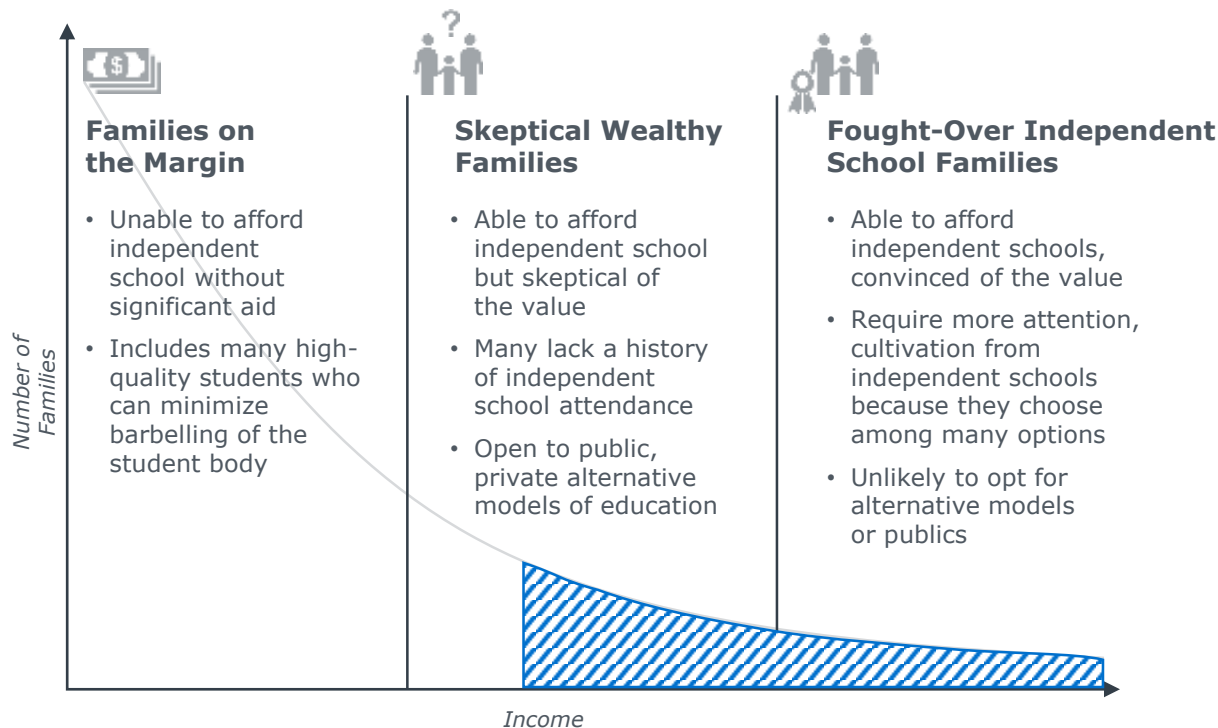
**...Leaving Schools with Small Pool of Full-Pay Parents<sup>1</sup>**



1) Assuming 2017 median ISEF member tuition of \$33.1K

# Potential Challenges For All Family Segments

## Tuition Increases Pressuring Independent School Market



# High Price Leads Families to Question Value

Value a Function of Each Family's Assessment of Price, Benefits



## Skeptical Wealthy Families

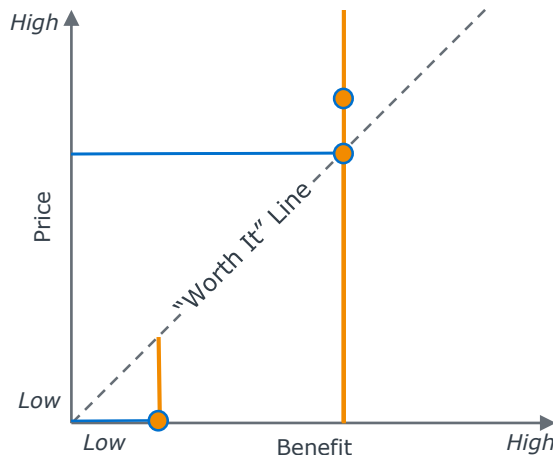
- Able to afford tuition but may question value
- May not be willing to make lifestyle adjustments to afford tuition
- May be first generation, wealthy families



When I spoke to the head at my alma mater, I had to tell him that **I'm not sure I will send my toddler to the school in a few years.** I chose my home partially based on the excellent local school, so why go back to my school?"

-Alumnus,  
K-12 Day School

## Value a Function of Price and Benefit



**val·ue** | noun | /'val-yü/

1 : Marginal benefit of the consumption of a good or service relative to its price<sup>1</sup>



Source: Sims Taylor K, "Theories of Value," *Human Society and the Global Economy*, 1996, <http://www.d.umn.edu/cla/faculty/jhamlin/4111/2111-home/value.htm>; "Value," Merriam-Webster Online, 15 Jan 2018, <https://www.merriam-webster.com/dictionary/value>; EAB interviews and analysis.

1) Marginal or exchange theory of value

# Extensive Choices Expand Parent Options

## Alternative Options for Families Seeking Value



### Independent School

- Many competing for same students
- Appear undifferentiated to many parents
- Increasingly unaffordable for many families



### Charter and Magnet Schools

- Grown by nearly 4 million enrollments since 1990s
- Reputation for innovation, flexibility
- Strong emphasis on socioeconomic diversity



### Traditional Public School

- Still free while independent schools raise tuition
- Neighborhood income stratification increasing, driven by families with children



### Religious School

- Fits with family faith
- Less costly than independent schools
- Clearly differentiated educational experience for students, parents



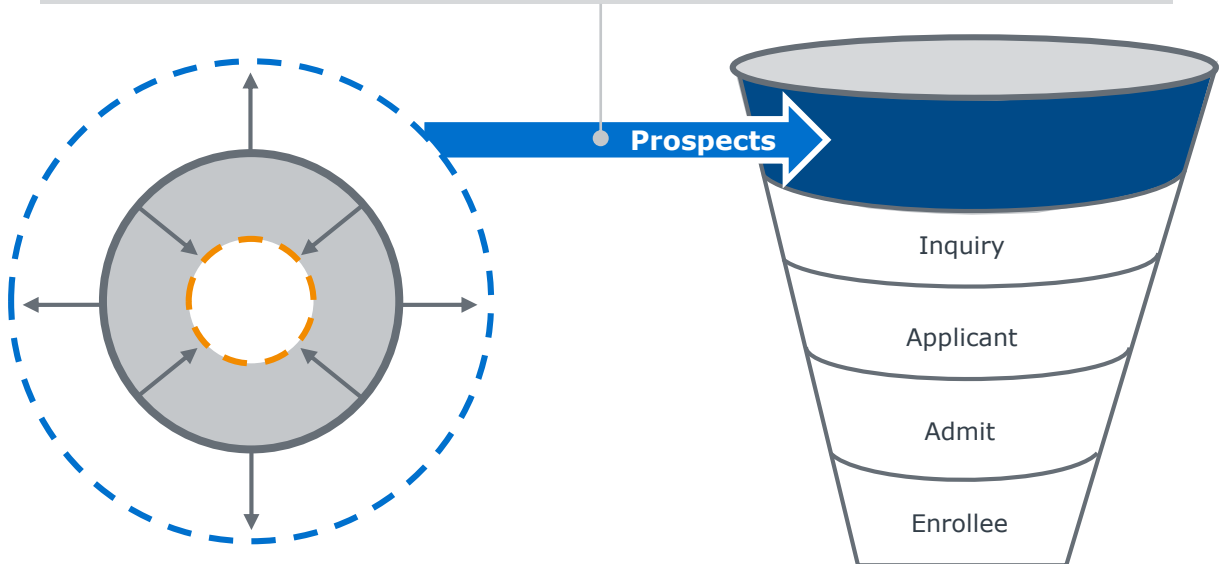
### Alternative Schools

- BASIS, AltSchool, Fusion Academy, Stanford Online School
- Experimentation with high-tech pedagogy
- “No-frills,” lower price

# Expanding Pool Means Going Up Funnel

## Larger Prospect Pool Necessary to Maintain or Improve Class Quality, Fills Seats

Expanding the prospect pool will help any school meet enrollment goals. This requires schools to actively recruit prospects, and convince more families to consider an independent school education for their child, rather than wait for families to inquire.





# Evolving Market, Requires New Approach

Demographic Changes Makes Traditional Approach to Admissions Obsolete



## Greater Diversity Among High Income Families

**Existing strategies fail to attract diverse, wealthy families** who live outside typical recruiting areas with different social networks

- Wealthiest Americans more racially diverse
- New pockets of wealth developing in previously lower- and middle-class neighborhoods



## Traditional Messaging Strategy Ill-Suited for New Prospects

Traditional messaging ignores needs of **increasingly diverse high-income families**

- Old strengths can feed into negative preconceived notions
- Reluctance to discuss price, aid turns off borderline-wealthy families

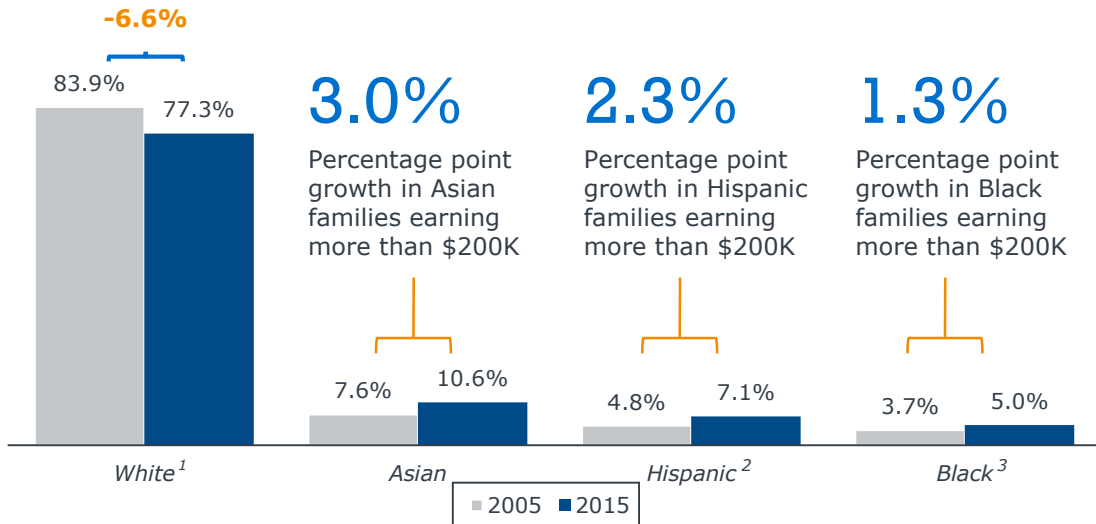


# Diversification of Income

## Racial Composition of High Income Households Changing Over Time

### More Racial Variation in Households Between 2005, 2015

Percentage of Households with Income of \$200,000 and Greater



1) White refers to households who only selected one racial category, excluding Hispanics

2) Includes all Hispanic races

3) Black refers to households who selected one racial category

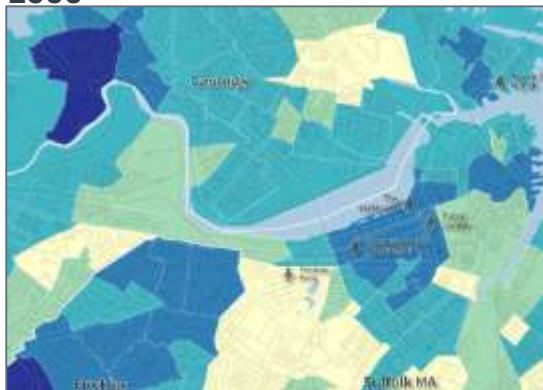
# Wealth Increasingly Found in New Locales

Recruitment Opportunities Not Limited to Traditional Neighborhoods

## Number of High Income Areas Increasing Near Cities

*Percent of Boston-Area Households Earning \$150K or Greater by Census Tract*

**2000**



**2012**



CENSUS, AMERICAN COMMUNITY SURVEY.

Percent of Households Earning >\$150K:



### Percentage Increase in Number of High Income Census Tracts, 2000-2012, in...

|                      |            |                                  |            |
|----------------------|------------|----------------------------------|------------|
| Boston <sup>1</sup>  | <b>57%</b> | Washington, DC                   | <b>28%</b> |
| Seattle <sup>1</sup> | <b>42%</b> | Oklahoma County, OK <sup>2</sup> | <b>50%</b> |

1) Urban area and suburbs  
2) County includes Oklahoma City

# Traditional Message Not Drawing New Audience

Schools Assume New Audiences Respond to Old Messaging

## New Audiences Need Different Appeal



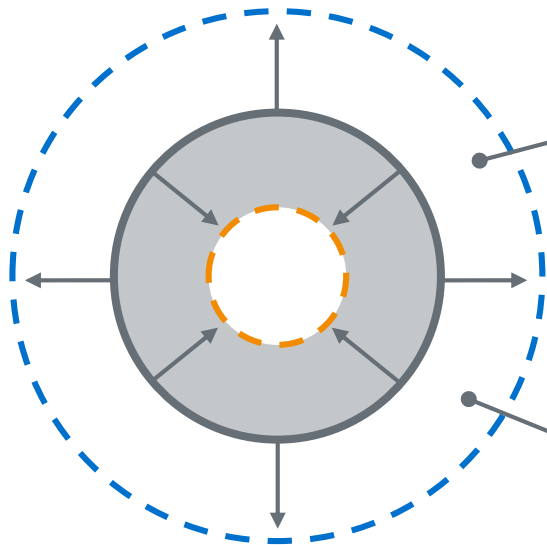
### Redefine Strengths

Traditional strengths of independent schools may not appeal to diverse audiences. In fact, those messages may be off-putting.



### Emphasize Affordability

Independent schools have not historically addressed "affordability," but must now do so in order to appeal to wealthy families who have been priced out.





# Old Strengths, New Liabilities?

## Yesterday's Differentiators Become Today's Weaknesses

### What Used to Appeal to Prospects May Turn Off Today's Families



Elite



*Elitist*

“Society doesn't mind private school after the age of 18. It's common to pay tuition to go to college, but generally not for high school. **Some people think that paying for high school is for 'snobby kids.'**”

*Pete Anderson  
Director of Enrollment Management and Admissions  
Episcopal Academy*



Exclusive



*Not Diverse*

“Even though 42% of our students are non-white, **the public still often perceives us as lacking diversity.**”

*Susan Gundle  
Director of Admissions and Financial Aid  
Oregon Episcopal School*



Traditional



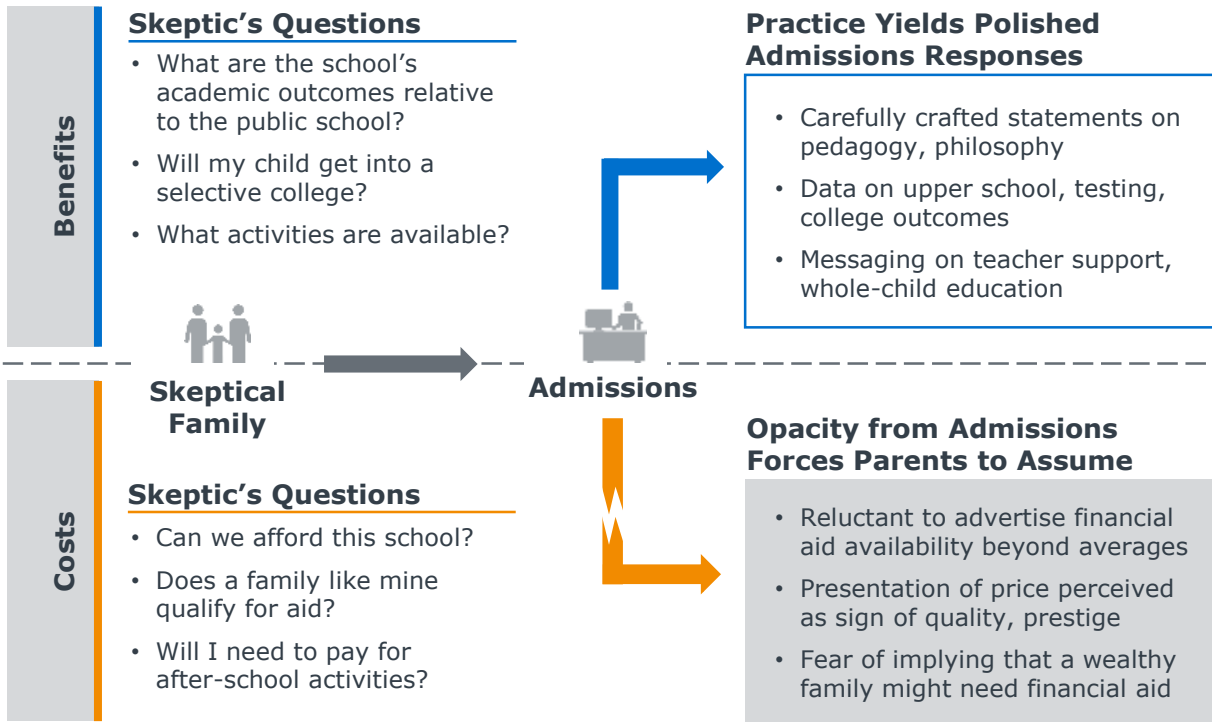
*Antiquated*

“We appreciate tradition, but we have an eye toward the future. **If we don't tell people about our innovations, they'll hold onto old ideas about us.**”

*Theodora Miller  
Director of Marketing and Communications  
St. Catherine's School*

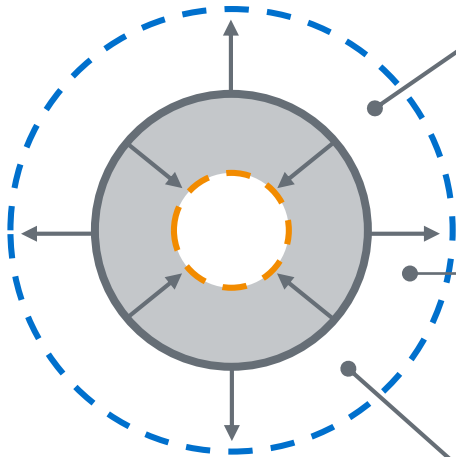
# Focus on Benefits Leaves Costs Unaddressed

## Unwillingness to Discuss Cost Ignores Skeptics' Core Questions



# Develop Enrollment Strategy to Expand Pool

## New Times Call for New Recruitment Approach



### 1 Use Data to Inform Enrollment Strategy

As potential full pay families are scarcer and wealthy families are more diverse and live in new neighborhoods, it is imperative that schools develop data and analytics capabilities to find and target those families more effectively.



### 2 Expand Efforts to Convince More Families to Consider Your School

To expand the pool of prospects, and fulfill myriad enrollment goals, schools need to shift their approach from waiting for families to inquire, to actively convincing families to consider their school and an independent school education.



### 3 Adapt Messaging to Appeal to Today's Prospects

To expand the pool schools cannot rely entirely on the messaging that has appealed to families in the past. Even wealthy families may have concerns about value, and other new prospects may not be attracted to a school's traditional appeal.



# Expanding the Enrollment Funnel

Four Key Strategies to Modernize Your Process, Generate New Leads

1

**Employ Data Analytics to Increase Market Intelligence**



Enrollment offices use data to identify new prospective families and understand external perceptions of the school to guide recruitment

1. Geodemographic Market Analysis
2. Psychodemographic Family Profiles
3. External Image Audit

2

**Build Brand Awareness to Generate Prospects**



Independent schools build brand awareness to reach families who might not otherwise consider an independent school education

4. Summer Camp Lead Capture
5. Targeted Prospect-Generating Events
6. Content Marketing Lead Cultivation

3

**Harness Full Potential of Word of Mouth**



Enrollment teams guide school advocates to spread disciplined message beyond traditional independent school networks

7. Parent Talking Points Card
8. Structured Parent Ambassador Network
9. Social Media Influencer Targeting

4

**Demonstrate Value with Concrete Messaging**



Schools convey value from the parent's perspective through concrete messaging on affordability, convenience, and educational methods

10. Teaching-Centered Open House
11. Parent-Centered Convenience Messaging
12. Transparent Financial Aid Messaging



- 1** Employ Data Analytics to Increase Market Intelligence
  - 2** Build Brand Awareness to Generate Prospects
  - 3** Harness the Full Potential of Word of Mouth
  - 4** Demonstrate Value with Concrete Messaging
-

# The Old Way of Doing Admissions

## Schools Focus on Relationship Building, Responding to Interest



### Relationship-Oriented

- Focuses on building personal connections with prospective families
- Helps prospective families feel a sense of belonging within the school community prior to enrollment



### Reactive

- Relies on prospective parents to find the school
- Responds to family interest after they inquire



### Intuition-Based

- Focuses recruitment effort in areas with history of concentrated enrollment
- Uses anecdotal knowledge from personal experience, current families to expand recruitment

“The profession has changed and **the focus has to be on how you can change your admissions office into an enrollment management office.** We like to joke that most people got into admissions because they are verbal, relational, and can talk while they walk backwards, but there is now a pressure for people to become at least somewhat familiar with data.”

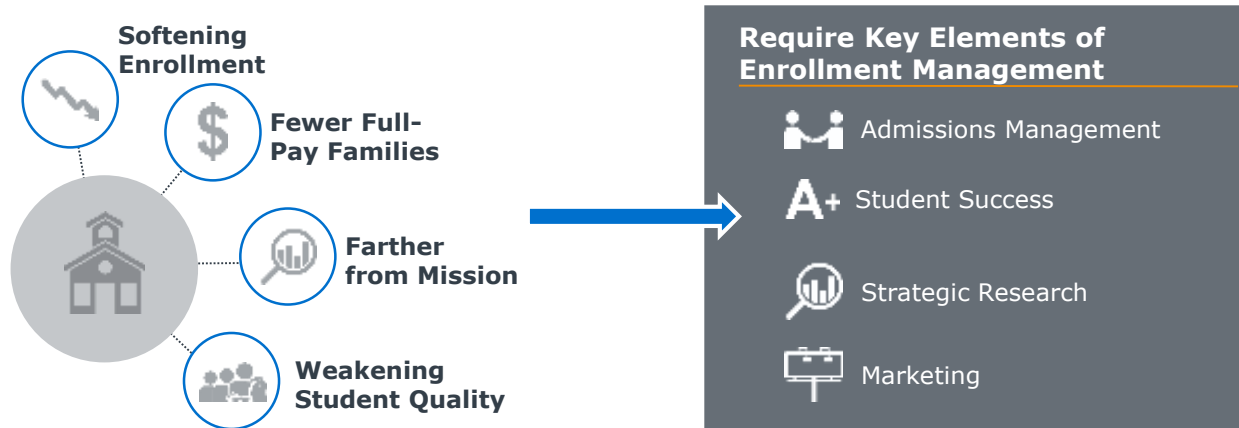
*Geordie Mitchell  
Director of Enrollment Management and Strategic Initiatives  
Buckingham, Browne & Nichols*



# Forces of Change Require New Approach

Admissions Office Must Move Toward Enrollment Management

## Several Factors Driving Need for Enrollment Management Admissions Strategy



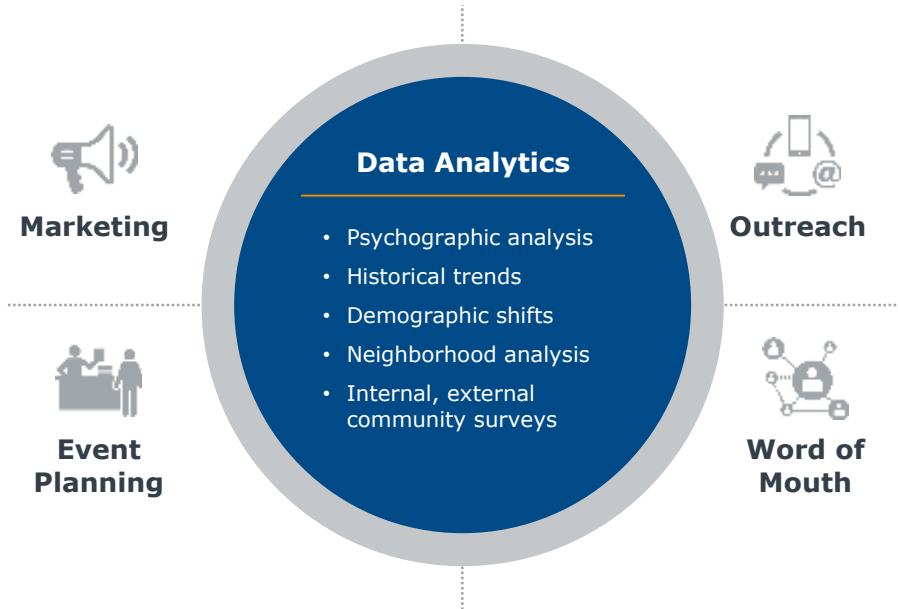
“An enrollment professional **must be an historian** and scholar of the school; **a strategic thinker** about the school; **an analyst** who can collect and synthesize data; **an adept marketer.**”

Christine Hailer Baker, Founder and President

THE BAKER GROUP

# A Data-Centered Approach to Admissions

Data Should Inform All Facets of Admissions Process



# Expanding the Enrollment Funnel

1

## Employ Data Analytics to Increase Market Intelligence



1. Geodemographic Market Analysis
2. Psychodemographic Family Profiles
3. External Image Audit

2

## Build Brand Awareness to Generate Prospects



4. Summer Camp Lead Capture
5. Targeted Prospect-Generating Events
6. Content Marketing Lead Cultivation

3

## Harness the Full Potential of Word of Mouth



7. Parent Talking Points Card
8. Structured Parent Ambassador Network
9. Social Media Influencer Targeting

4

## Demonstrate Value with Concrete Messaging



10. Teaching-Centered Open House
11. Parent-Centered Convenience Messaging
12. Transparent Financial Aid Messaging

# Use Historical Data to Identify Areas for Growth

## BB&N Assesses Market Presence with Demographic, Enrollment Data



### Map Zip Code Income Ranges



- Use census data to highlight high income zip codes
- Color code multiple income bands on map to highlight potential full or partial pay families

### Pin Enrollment Data Onto Maps to Illustrate Income



- Plot addresses of inquiries, applicants, current families on separate maps to capture full market landscape

### Overlay Maps, Interpret Patterns



- Identify neighborhoods with high volume of inquiries, applicants, but few to no enrollments
- Increase marketing efforts in high-income areas with high volume of inquiries, applicants

### Identify Opportunities, Next Steps



- Survey families who declined enrollment to determine barriers to entry
- Assess needs of potential markets, identify solutions to enrollment barriers

## Start with “Low-Hanging Fruit,” Build from There

“We started with the low-hanging fruit. Here’s the areas where the families can pay and here’s some areas where we already have some families. Let’s try that first.”

*Geordie Mitchell  
Director of Enrollment Management and Strategic Initiatives  
Buckingham, Browne & Nichols*



# Seeing the Full Landscape

## Public, Enrollment Data-Mapping Visually Highlights Key Trends







### Census Data with Current Enrollment Overlaid<sup>1</sup>



#### Components of Geodemographic Mapping Exercise

- **Blue push pins** represent current enrollments, highlight long commutes families willing to make to attend BB&N
- **Concentrated areas of blue pins** show neighborhoods where BB&N typically recruits
- **High-income areas with few current enrollments** seen as opportunity for marketing, recruitment of mission-aligned families

#### Map Legend (Average Household Income)

- |   |  |
|---|--|
|  \$350,001 to \$450,000 |  \$250,001 to \$350,000 |
|  \$150,001 to \$250,000 |  \$75,001 to \$150,000  |
|  \$0 to \$75,000        |  2008 Total Enrollment  |






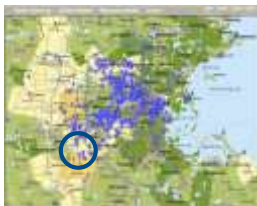
#### Census Data

**Income bands focus on high-income areas**, visualizes geographic distribution of wealthy families around Boston

1) The map shown was created using MapPoint, a Microsoft GIS software that is no longer sold.

# Check Assumptions with Geographic Insight

## BB&N Locates Target Markets Using GIS Tools

|  <b>Assumption</b> |  <b>Data Informed Insight</b> |  <b>Follow-Up Action</b> |   |
|---|--|---|---|
|                     | <p>Massachusetts Pike acts as barrier, prevents families south of Mass Pike from attending BB&amp;N</p>        | <p>Enrollment data illustrates heavy concentration of families south of Mass Pike</p>                       | <p>Market to suburbs south of Mass Pike to maintain, expand enrollments</p>                         |
|                     | <p>Families unwilling to commute 25 miles, one hour to attend BB&amp;N</p>                                     | <p>Number of families commuting longer than one hour higher than expected</p>                               | <p>Busing extended to outer suburbs to encourage prospective families concerned about logistics</p> |
|                     | <p>Southwestern suburbs offer greatest opportunity for admissions recruitment</p>                              | <p>Neighborhoods confirmed as potential markets based on illustrated average household income</p>           | <p>Bus route extended southwest to ease commute burden, ramp up word-of-mouth efforts</p>           |



# Competitive Market Calls for New Strategy

## GDS Lower School Faces First Signs of Common External Threats



### **Public, Private Competition...**

*Local Schools Compete for Quality Students*

- GDS draws from six public high schools ranked among top 15 in Maryland<sup>1</sup>
- GDS among top six private lower schools in DC within three miles of campus<sup>1</sup>



### **...And Local Dispersion of Wealth...**

*Dispersion Across DC Metro Area*

- Closest feeder neighborhoods too expensive for many young families
- Influx of young, wealthy families in distant, gentrifying neighborhoods



### **...Lead to Steady Softening of Lower School Applications**

10

Pre-K, kindergarten applications per seat in 2002

4

Pre-K, kindergarten applications per seat in 2017

1) School rankings from Niche.com.

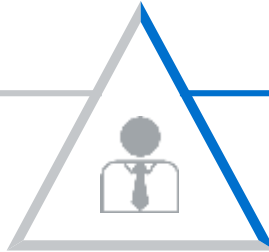
# Moving Beyond Simple Demographics

## Psychographic Analysis Identifies Consumers' Psychological Attributes

### Demographics, Psychographics Combine to Paint Full Consumer Picture

#### Demographics

- Male, age 30-34
- \$135,000 annual income
- African American
- Single



#### Psychographics

- Training for a half marathon with a running group
- Values the comradery, competition of group training
- Extrovert

#### psy-cho-graph-ics

| noun | /ˌsɪkəˈɡræfɪks/

- 1 : market research that classifies population groups according to psychological variables such as attitudes, values, or fears

#### Study in Brief: Psychological targeting as an effective approach to digital mass persuasion

- Three real-world experiments using the digital footprint of a total of 3.7M people worldwide
- Results indicate that tailoring advertising appeals based on psychological profile influences behavior as measured by clicks and conversions

# Psychographic Data Informs Message Creation

Children's App<sup>1</sup> Marketers Adjust Message According to Parenting Habits

## Single Demographic Group Segmented into Three Psychographic Sub-Groups

### Demographic Group



- White family with at least one young child
- Income of \$60K-\$100K

### Psychographic Sub-Groups



#### Enablers

Want technology that entertains children

#### Sample Message

*"Kids play on our app for hours!"*



#### Limiters

Restrict screen time to apps developing math, literacy

#### Sample Message

*"Our app was the top rated math education app in 2017."*



#### Mentors

Aim to develop academic, tech, learning skills

#### Sample Message

*"Kids who play with our app ask more questions in kindergarten classes."*

1) E.g. Leapfrog, PBS, and Minecraft.



# Find the Next Class of Mission-Aligned Families

GDS Current Family Data Generates Profiles of Best-Fit Prospects



## Partnership with Connor Associates<sup>1</sup> Generates Intelligence on Core Segments



### Selected Current Mission-Aligned Families

- Admissions, Advancement identified top 20% of current families that best represent school mission, goals
- Compiled known demographic data on families, such as income, parent education, zip code



### Families Sorted into Psychographic Segments

- Selected psychodemographic profiles that include parents from third-party, such as Experian
- Assigned each mission-aligned current family to appropriate psychodemographic profile



### Directed Messaging, Outreach to Dominant Segments

- Used psychographic descriptions to develop messages that appeal to most common segments
- Purchased mailing list of families who fit common psychodemographic profiles to generate prospects



### Top Segments of GDS Families



No Time Like the Present



On the Road Again



All in the Name



Look at Me Now

1) Connor Associates, an independent school marketing and advancement firm, uses a proprietary methodology and psychographic profiles.

# Market Intelligence Informs Branding

Upcoming Rebrand Chance to Align Strengths, Opportunities

**Psychodemographic Analysis Identifies Segment Saturation, Opportunities**



## Saturated Segment



### Look at Me Now

- Values personal attention, customer service
- Gives to charity
- Enjoys exclusive membership

## Segments with Recruiting Opportunities



### On the Road Again

- Dislikes frills and gimmicks
- Prefers generic products
- Seeks fair value from purchases



### All in the Name

- Keeps up with fashion trends
- Chooses prestigious products
- Follows influencer recommendations



### No Time Like the Present

- Prone to impulse purchases
- Seeks convenience, ease of use
- Projects identity through purchases

### GDS already attracts most of its families from this segment.

Because many of these families already attend GDS, there are fewer new Values-Based families to recruit.



“If we want to expand our reach, then we need to get better at **translating who we are** to people who are not already receptive to the way we like to talk about ourselves.”

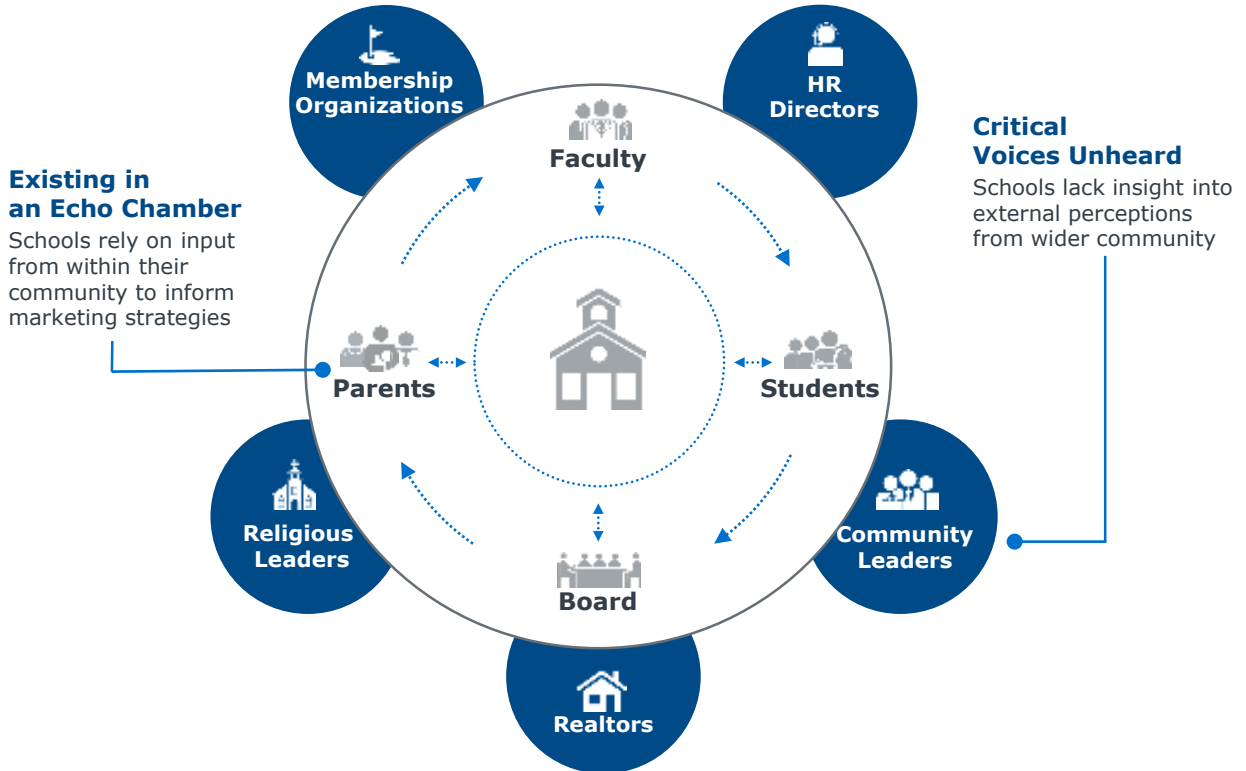
Barbara Eghan

Director of Enrollment Management and Financial Aid

GEORGETOWN DAY SCHOOL

# External Perceptions a Potential Blind Spot

Influential Voices Often Unheard Within School Community





# Fill the Information Gap with External Audit

## Ravenscroft Assesses External Perceptions to Inform Marketing Strategy

### Independent School Welcomes Views from Outside Community



1

#### Alumni

##### Sample Questions

- How would you describe the school's brand when you attended versus now?
- Would you send your child to our school?



2

#### Families Who Left

##### Sample Questions

- Why did you decide to leave the school?
- Where did you enroll your child after leaving our school?



3

#### Business Leaders

##### Sample Questions

- What have you heard about our school?
- What would make you want to send your child to our school?



**Main Takeaway: Wider community viewed Ravenscroft as elite, inaccessible**

## Existing Strategies Revamped After External Image Audit



#### Website Redesign

Ravenscroft overhauled website to make it more welcoming, easier to navigate



#### Word of Mouth Strategies

Parents in Ravenscroft's Proud Parent Program received training, materials to increase reach



#### Building Community Relationships

Current families begin hosting "Ravenscroft Coffees" for neighbors, prospective families, community members



#### Targeted Messaging

Online, print marketing materials changed to emphasize attainability



## **1 Identify promising recruitment territories through data analysis, not intuition**

Compare historical admissions data with current geodemographic data to locate under-recruited neighborhoods, new pockets of wealth, and move beyond admissions office assumptions

## **2 Understand current families' values to guide messaging for prospective families**

Develop psychodemographic profiles of target audiences to guide recruitment of prospective families who are likely to appreciate school's philosophy, community

## **3 Inform marketing strategy with relevant community stakeholders' perceptions of school**

Survey critical external audiences (e.g. local business leaders, realtors, community leaders) to better understand perceptions beyond the existing school community and inform branding, marketing efforts

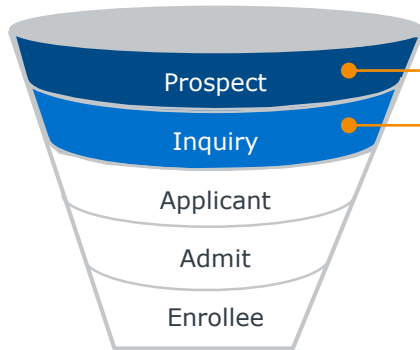


- 1 Employ Data Analytics to Increase Market Intelligence
  - 2 **Build Brand Awareness to Generate Prospects**
  - 3 Harness the Full Potential of Word of Mouth
  - 4 Demonstrate Value with Concrete Messaging
-

# Parents Need a Reason to Inquire

Push Focus up Funnel to Expand Applicant Pool

## Top of Funnel Calls for Brand Awareness, Not Open Houses



### Starting Too Far into Funnel

Typical admissions activities target inquiries seeking detailed information, ignoring prospects who need to be persuaded to inquire

### Afraid to Be Our Own Advocates





“We don’t have the cultural consensus that says ‘We should be marketing.’ We’ve been sitting on our hands for many years saying, ‘We’re above this.’ Collectively, we’re spending one fifth, one tenth, of what we should to make sure people understand our value proposition.”

*Pete Anderson  
Director of Admissions and Enrollment Management  
Episcopal Academy*



# Mass Advertising Taboo for Many Schools

Marketing Strategies Have Broad Reach, but Often at Odds with Self-Image

| Mass Advertising Strategies  | Broad Reach but Weak Impact  | Could Create Negative Perceptions in School Community   |
|--|--|---|
| <br>Billboards<br><br>Web Banners<br><br>Print Ads<br><br>TV/Radio | <ul style="list-style-type: none"> <li>• Hard to share rich messaging in short formats</li> <li>• Difficult to target core audiences</li> <li>• Easy to ignore</li> <li>• Requires repetition</li> </ul> | <ul style="list-style-type: none"> <li>• Suggests school is struggling to fill seats</li> <li>• Promotes image that school does not attract high-quality students</li> <li>• School's representation in ads may conflict with current parents' image of school</li> </ul> |



## Muted by a Soundbite Society

“We have to figure out how to better communicate, in a soundbite society, what is an abstract concept. Our value doesn't lend itself to—and is sometimes cheapened by—the metrics and platitudes shared in ads.”

*Guy Bramble  
 Head of School  
 Heritage Hall*

# Subtle Marketing Approaches Suit Schools Better

Brand Awareness Efforts Complement Existing Discrete Marketing Activities

## Brand-Building Activities Ideal for Independent Schools

1

### Summer Camps

Summer camps expose families to school's facilities, programming, staff, students, providing glimpse into life, community of school



2

### Community Events

Campus events open to the community offer prospective families opportunity to visit campus, become familiar with school brand, offerings



3

### Content Marketing

Content marketing establishes school as source of expert knowledge on relevant, timely topics without an explicit sales pitch



4

### Digital Ads

Digital ads provide schools discrete, targeted way to market online to prospective families



# Expanding the Enrollment Funnel

1

**Employ Data Analytics to Increase Market Intelligence**



1. Geodemographic Market Analysis
2. Psychodemographic Family Profiles
3. External Image Audit

2

**Build Brand Awareness to Generate Prospects**



4. Summer Camp Lead Capture
5. Targeted Prospect-Generating Events
6. Content Marketing Lead Cultivation
- 6½ Family Networking Dinner

3

**Harness the Full Potential of Word of Mouth**



7. Parent Talking Points Card
8. Structured Parent Ambassador Network
9. Social Media Influencer Targeting

4

**Demonstrate Value with Concrete Messaging**



10. Teaching-Centered Open House
11. Parent-Centered Convenience Messaging
12. Transparent Financial Aid Messaging

# Summer: The Forgotten Season

## A More Subtle Approach to Marketing

### What We Heard: Common Barriers and Solutions to Recruiting Camp Families



Summer Off-Cycle

*"Summer is too soon to start recruitment."*



*Solution:*

#### Plan for Summer Recruitment

- Add summer emails, events to communications plan



Siloed Office Structure

*"The admissions and camps offices operate separately."*



*Solution:*

#### Collaborate Across Functions

- Coordinate admissions and camps functions to include admissions touchpoint during camps



Data Ownership

*"The camp vendor owns campers' contact information."*



*Solution:*

#### Admissions Clause in Contracts

- Include clause in vendor contracts permitting admissions to use campers' contact information



No Return on Investment

*"Campers may not be interested in attending the school."*



*Solution:*

#### Ask Prospects to Self-Identify

- Campers with a good experience may be open to considering the school if given the chance



# Design Camps from Admissions Perspective

## MBA Demonstrates Strength, Value Proposition with Mission-Aligned Camps



### MBA Camp Lifecycle with Admissions Touchpoints

#### 1 Design Camps for Parent Convenience

- Camps targeted at K-6 to welcome families before MBA entry (7-9)
- Schedule includes camps for public school break, holidays
- Co-ed camps at boys' school reduce burden for multi-child families

#### 2 Expose Families to MBA Strengths

- Campers, parents shown best facilities
- MBA student counselors build friendships with campers, meet parents
- Admissions staff available at drop-off, pick-up for informal conversations

#### 3 Follow Up with Admissions Soft Sell

- Campers receive handwritten letter, photo from MBA student counselor
- Two admissions recruitment emails sent to 5<sup>th</sup>, 6<sup>th</sup> grade parents in early fall

### Deliberate Decisions Increases Attendance of Younger Campers

**2%** MBA camps for kindergarten-aged children in 2012



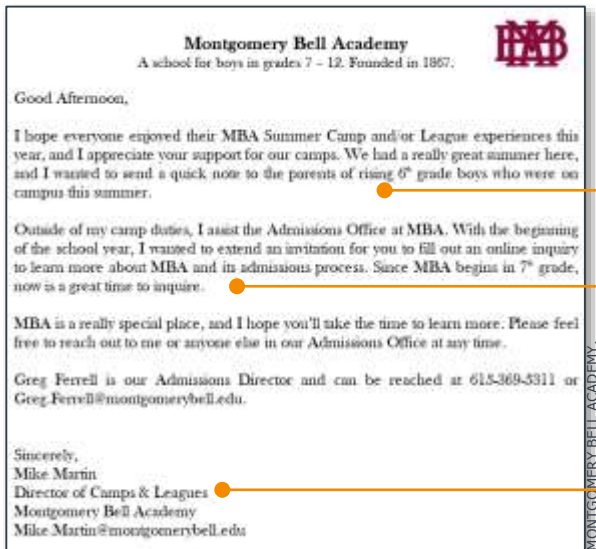
**17%** MBA camps for kindergarten-aged children in 2017

# Converting Campers to Enrollees

## Camp Pipeline Becomes MBA's Top Source of Students

### Encourage Families to Inquire

*Post-Camp Recruitment Email*



**Targeted** to student age group to foster relevant prospects

**Low-commitment, non-threatening** message

**Sent from Director of Camps** instead of Admission so parents recognize familiar name

### Campers Become Students, Prove ROI

130

3,400

Average campers per year



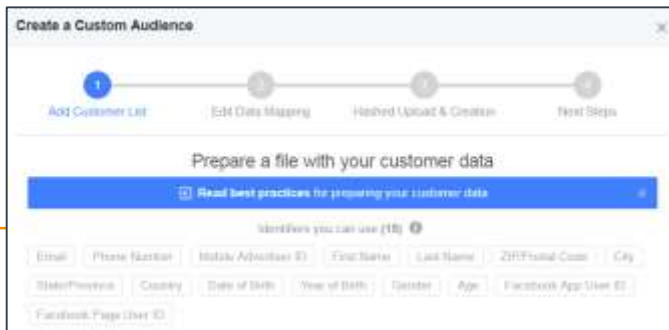
81%

Percent of 7<sup>th</sup> grade class that attended an MBA camp



# Facebook Enables Targeting, Brand Expansion

Ad Tools Help Businesses Reconnect with Users, Find New Ones  
**Business Uploads Customer List**



**Goal:** Reach Existing Customers

## Facebook Custom Audiences

Facebook matches list entries to user accounts, sends ads to those users

*Benefits:*

- Highly targeted to specific audience
- Additional touchpoint on popular platform for parents

**Goal:** Find New Prospects

## Facebook Lookalike Audiences

Facebook sends ads to users with characteristics similar to users matched from list

*Benefits:*

- Uncovers new audiences
- Avoids existing parents
- \$7.19 charged per 1000 impressions

Source: Facebook Business, "Custom Audiences: A Facebook Ads Tutorial," <https://www.youtube.com/watch?v=98PKWCxUow>; Gotter A, "The Complete Resource to Understanding Facebook Ads Cost - 2016 Benchmarks," Adespresso, 19 April 2017, <https://adespresso.com/blog/facebook-ads-cost/>; EAB interviews and analysis.

# Don't Let Warm Leads Grow Cold

## Social Media Reconnects School with Camp Families

### Facebook Custom Audiences Enables Subtle, Long-Term Advertising



#### Upload List of Camp Parents' Contact Information

- Admissions uploads camp parents' names, emails, phone numbers using Facebook's secure service



#### Facebook Matches Contact Information to Parent Accounts

- Facebook creates list of user accounts belonging to listed parents
- Facebook saves list of accounts for future use



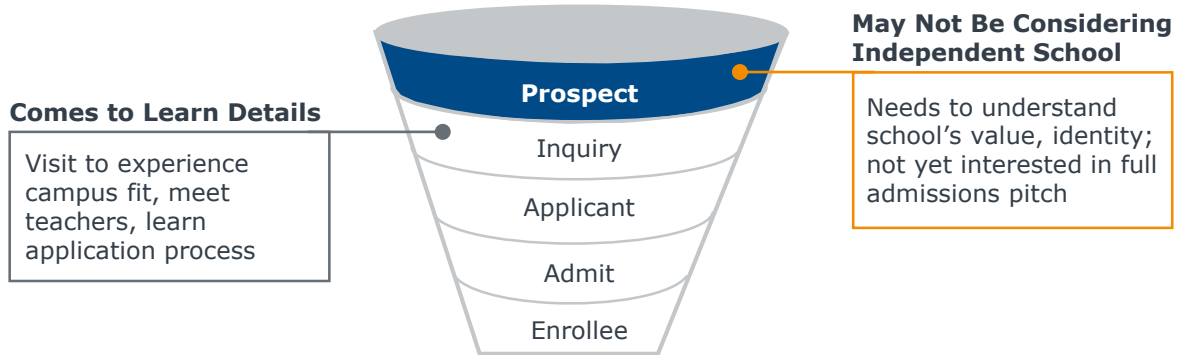
#### Send Ads Inviting Parents to Future Camps, Admissions Events

- Admissions sends ads for events to parents of campers in grades 5-8
- Camp Office sends ads for future camps to parents of campers in grades K-4

# Opt-In, Familiarity Needed to Attend Open House

Prospects Need Low-Commitment Opportunity to Visit Campus

## Campus Visits Ideal for Inquiries, Applicants, Not Prospects



### Education Doesn't Sell Itself

"When families aren't looking for us, don't drive by us, and don't know about us, how can we inspire them to come to campus?"

*Theodora Miller*  
 Director of Marketing and Communications  
 St. Catherine's School






# Events with Broad Appeal Attract Prospects

## STEM Workshops Introduce New Families to St. Catherine's School



### At 'Girls Innovate Junior Workshops,' Parents Experience School While Kids Play

| EVENT   | PROMOTION   | FOLLOW UP  |
|---|---|--|
| <p><b>STEM Workshops Designed to Bring Families to Campus</b></p>  <ul style="list-style-type: none"> <li>• Free, one-hour “play and learn” events for families with girls age 2.5 to 5</li> <li>• Four teacher-led STEM activities, such as LEGO building, coding</li> <li>• Current grade 4-12 students assist teachers, interact with parents, children</li> <li>• Admissions staff available to answer questions</li> </ul> | <p><b>Advertising Targets Mission-Aligned Parents</b></p>  <ul style="list-style-type: none"> <li>• Purchased targeted ads on Facebook, Google</li> <li>• Placed sponsored articles about girls’ STEM education in local magazines</li> <li>• Asked current parents to invite friends with young children to register</li> </ul> | <p><b>Follow-Up Reinforces St. Catherine’s STEM Expertise</b></p>  <ul style="list-style-type: none"> <li>• Curated STEM teaching resources for parents</li> <li>• Sent email series of admissions office-authored articles on girls’ STEM education</li> <li>• Invited no-shows to future workshops, admissions events</li> </ul> |

# Prospecting Event Builds Brand Awareness

Strategy Incorporated into Admissions Cycle After Promising Results

## STEM Workshop Produces High Attendance, New Leads



51

New prospects generated from three Girls Innovate Junior Workshops



63%

Attendance rate among new leads who registered



2

New prospects who attended, enrolled (to date)



7

Applicants who attended, eventually enrolled (to date)

### Meeting Families Where They Are

“This event is a way where **we can meet prospective families where they are, even when they’re not looking for our school.** They get to discover us through a free community event, step into our classrooms, and watch their children with our teachers in action.

*Theodora Miller*  
Director of Marketing and Communications  
St. Catherine’s School



# Show Your Strengths at Public Prospecting Events

## Events Demonstrate Strengths to Prospective Families



### Performing Arts

Offer teacher-led classes, student performances to showcase performing arts program



### Coding

Open computer lab for teacher-led coding classes, partnerships with local tech companies



### Fine Arts

Open studio to local families, offer art classes, publicize student art shows



### Athletics

Invite prospective families to attend student games, enroll in on-campus leagues



### Music

Offer music lessons, public student performances



### Maker Space

Share maker space with public through workshops, competitions

# External Factors Create Enrollment Challenges

Previous Admission Strategies No Longer Sufficient in Face of Hardship

## Several Factors Impact Pittsburgh-Area Market

### Population Decline

#### Year-Over-Year Population Loss



**55%**

Population loss between 1950 and 2010

### Aging Population

#### Older Residents Mean Fewer Children



**40.8**

Median age in Allegheny County, Pennsylvania in 2010

### The Great Recession

#### Economic Downturn Hits Area Hard



**9.2%**

Peak unemployment rate during Great Recession in 2010

# Develop Content Appealing to New Prospects

Sewickley Academy Offers Parenting Advice, Generates New Leads



## Steps to Implement Lead Generation Through Content Marketing

### 1. Create Content



Write content appealing to interests of local, external families

### 2. Extend Reach



Use social media marketing tools to reach new parent audiences

### 3. Capture Leads



Offer free downloads to capture parent contact information

## Recommended Reading to Build Content Marketing Skills



*Inbound Marketing: Get Found Using Google, Social Media, and Blogs*  
Brian Halligan and Dharmesh Shah



*Youtility: Why Smart Marketing Is About Help Not Hype*  
Jay Baer



# Expertise, Entertainment Builds Brands

## Content Marketing Attracts Customers with Fun, Engaging Media

### con-tent mar-ket-ing

| *noun* | / , kən'tent 'mɑːrkɛdɪŋ /

Promotional media designed to provide value, such as educational or entertainment, to a consumer, stimulating interest in a brand's products or services

*Examples of content marketing:*

- Expert blogs
- Interviews
- Sponsored articles
- User-generated images/videos
- Travel logs

### Top Brands Build Awareness, Buyers Through Content



- Four Seasons Magazine, website feature destinations with Four Seasons Hotels
- 42% more revenue per booking when made through website



- User-generated videos show GoPro camera's quality, uses
- 1.6B videos viewed on You Tube



- Trulia blog designed to attract Millennials to its home search services
- 31% increase in website traffic since blog launch; 34% increase in repeat visitors

# New Readers Attracted by General Content

Parenting, Seasonal Topics Emerge as Best for Prospect Engagement

## Most Common Blog Topics

### Non-Sewickley Topics

- General Parenting Tips
- Holiday Advice
- Seasonal Activities
- Book Reviews and Recommendations

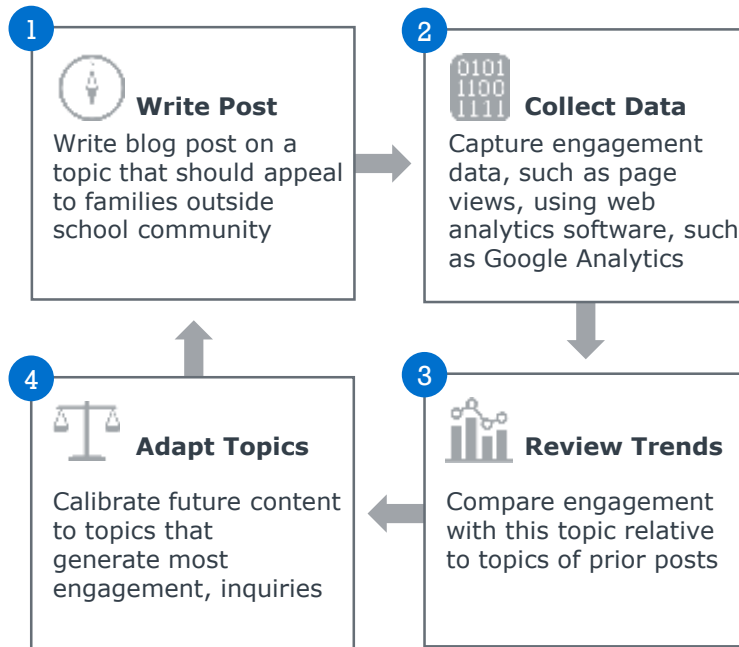
### Sewickley Topics

- Education, Classroom Stories
- Head of School Posts
- Alumni Stories

# 4:1

Ratio of non-Sewickley-focused posts to Sewickley-focused posts in 2016

## Iterative Content Process Identifies Top Subjects



# Find Blog Readers Similar to Current Parents

## SEO, Facebook Lookalike Audiences Drive Blog Traffic



### Improve Blog Search Results

- ✓ Determine key words:
  - Use Google Trends
  - Survey users
  - Conduct trial and error from prior posts
- ✓ Use key words in title, body, image titles, tags, URL of blog post
- ✓ Include images, image names, videos where possible
- ✓ Link to other blog posts

### Search Engine Optimization



### Connect with Likely Prospects

- ✓ Upload current family list as a Facebook Custom Audience
- ✓ Create ads linking users to popular content
- ✓ Send ads to Facebook Lookalike Audience to extend reach

### Facebook Advertising



**12K** Blog hits from organic search and Facebook in H2 2017

For more on SEO, see the [Web Optimization Toolkit](#) at eab.com.

# Keep Prospects Engaged with Additional Content

## Free Education Guides Capture Parent Contact Information

### Sewickley Converts Readers into Prospects

#### Parent Reads Post

Local parents read Sewickley blog posts



#### Blog Offers Free Guides

Call to action on every post asks reader to download free guides



#### Parent Gives Contact Details for Guide

Reader completes Sewickley contact form (name, email, child's grade) to download guide



#### Parent Added to Email Lists

If reader only shows interest in guide, prospect added to blog email list

If reader shows interest in Sewickley, prospect added to admissions inquiries



**3** Guides targeted to parents of lower, middle, and upper school children

- *Pre-K Checklist*
- *27 Questions to Help You Evaluate a School for Your Child*
- *College Visit Campus Checklist*

**70** Average prospects added each month to blog email list

# Minority Families Underrepresented on Campus



## Families of Color Do Not See Themselves at Independent Schools

### Many Factors Prevent Students of Color From Enrolling at Independent Schools



#### Lack of Diversity

Few students of color within existing independent school population



#### Lack of Familiarity

Students of color may not have family or community history within independent schools



#### Insufficient Recruitment

Independent schools often do not actively recruit students of color or limit recruitment to traditional networks that do not reach minority families



#### Untailored Messaging

Typical messaging that relies on knowledge of independent school value may not appeal to prospective minority families

# BB&N Forms Consortium to Expand Network

Ten Independent Schools Collaborate to Recruit Minority Students



## Recruiting Prospective Minority Families Through Consortium Events



### Ten Independent Schools Form Consortium

- BB&N Director of Enrollment and Strategies Initiatives reaches out to local independent schools to form consortium to recruit more black, Latino families
- Schools agree to promote value of independent school over individual schools



### Current Families Trained on Recruitment

- Training session held for parents of current minority students on power of recruiting through word of mouth
- Families trained on strategies to recruit mission-aligned minority families with young children within their professional, social networks



### Ongoing Networking Dinners Held

- Prospective, current families of color invited to consortium dinners with teachers, staff
- Two dinners held per year for past four years to promote the value of an independent school education for students of color



“My goal was to make sure that our students of color are telling other families about the positive experience they are having at an independent school and encourage them to come and take a look at what we have to offer.”

*Geordie Mitchell, Director of Enrollment Management and Strategic Initiatives  
Buckingham, Browne & Nichols*

# Consortium Efforts Yield Results for BB&N

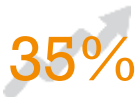
## More Minority Families View BB&N as Good Fit, Enroll at School

### Unified Efforts to Network with Prospective Families of Color Leads to Increase in Enrollment of Minority Students at BB&N



150

Families in attendance  
at first consortium dinner



35%

Overall increase in  
students of color at  
BB&N between 2015-16  
and 2017-18 school years



41%

Percent of students of  
color enrolled in the  
lower school as of the  
2017-2018 school year

“We identified the demographic and reached out to that small number of that demographic in our school. And we said [to professional families of color], ‘Help us. Help us find more families like you. Help us connect through your social networks and your work networks to find more families like you and more children like your children **so that we can become a more diverse community.**”

*Geordie Mitchell, Director of Enrollment Management and Strategic Initiatives  
Buckingham, Browne & Nichols*



## **1 Include families from camps, community events in recruitment**

Treat families from non-admissions events as warm prospects who are aware of school's mission, find school accessible, and want to learn more

## **2 Use content marketing to attract prospects, build brand as experts**

Content marketing is an effective means of getting the attention of prospective families, that provides value to consumers, while avoiding many of the downsides of conventional mass marketing

## **3 Position school as trusted expert to reach larger audience**

Appeal to new prospects with brand-appropriate marketing strategy that showcases school expertise instead of promotional platitudes



1

Employ Data Analytics to Increase Market Intelligence

2

Build Brand Awareness to Generate Prospects

3

**Harness the Full Potential of Word of Mouth**

4

Demonstrate Value with Concrete Messaging

---

# Word of Mouth Influential, But Unstructured

Despite Power of Peer Recommendations, Schools Under-Invest in Referrals

## Word of Mouth Powerful Recruitment Tool...



75%

Of applicants come through referrals

## ...But Schools Spend Little Time Developing this Tool



Of admissions director's time spent on fostering word of mouth referrals

## Parent Ambassadors Unguided by Schools

- 1 Lack of Message Control**  
Schools provide little direction to parents to share a consistent message
- 2 All-Comers Approach to Ambassadors**  
Schools use open calls for volunteers to staff events, outreach to prospective families, students
- 3 Ambassadors Unsupported**  
Schools assume parents will be ambassadors for school in community, but do little to focus these efforts
- 4 Limited to Close Ties**  
Only close ties are reached by word of mouth, while those outside parents' immediate network are missed

# Getting Everyone Rowing in the Same Direction



Unified Effort Amplifies Already Powerful Recruitment Channel

## Key Elements to Developing a Structured Word of Mouth Approach



### Identify All Ambassadors

Actively seek out all strong ambassadors, not relying only on those who volunteer



### Create a Parent Ambassador Network

Clarify roles, responsibilities of parent volunteers, with clear calls to action



### Target Messages

Ensure parent volunteers customize their messages to ensure they resonate with prospective parents



### Promote Consistent Messaging

Provide regular trainings, support resources to foster unified parent messaging

# Expanding the Enrollment Funnel

1

**Employ Data  
Analytics to Increase  
Market Intelligence**



1. Geodemographic Market Analysis
2. Psychodemographic Family Profiles
3. External Image Audit

2

**Build Brand  
Awareness to  
Generate Prospects**



4. Summer Camp Lead Capture
5. Targeted Prospect-Generating Events
6. Content Marketing Lead Cultivation

3

**Harness the  
Full Potential of  
Word of Mouth**



7. Parent Talking Points Card
8. Structured Parent Ambassador Network
9. Social Media Influencer Targeting

4

**Demonstrate Value  
with Concrete  
Messaging**



10. Teaching-Centered Open House
11. Parent-Centered Convenience Messaging
12. Transparent Financial Aid Messaging



# Every Parent Is a Representative

Equip Current Parents with Information Card to Share with Prospects



## Harpeth Hall Card Designed with Referrals in Mind

### Small Card, Full of Information

7x5 inch card contains information about school's unique value on front, back

### Designed as Hand Out for Prospective Parents

Cards created by admissions team to guide current parents' message, leave prospects with tangible reminder about school, encourage follow-up

### Made Available to Entire School Community

Cards first designed for parent ambassadors, later shared with all parents; electronic version of card emailed to school community

**Harpeth Hall**

Educating girls in grades 5-12 to Think Critically, to Lead Confidently, and to Live Honorably

**Quick Facts**

- 150+ year tradition of being innovative pioneers in girls' education
- 680 girls and young women in grades 5-12
- 7-8 student to teacher ratio
- Student body represents 33 zip codes, 22 religious denominations, and 115 sending schools
- 98% retention
- 15.3% students of color
- Tuition includes lunch
- 16% of the student body receives some level of need-based financial aid
- Financial aid awards range from \$1,200 to \$27,400
- 100% matriculation to 4 year colleges or universities in the U.S. and abroad
- The class of 2017 was awarded more than \$13.6 million in scholarships for college.

**Why a girls' school?**

2/3 of students at all-girls schools expect to earn a graduate or professional degree.

Source: *Steepled in Learning: The Student Experience at All-Girls Schools* © 2016 National Coalition of Girls' Schools

**Girls' schools empower students to become bold leaders.**

93% of girls' school graduates say they were offered greater leadership opportunities than peers at co-ed schools. 80% have held leadership positions since graduating from high school.

Source: *The Girls' School Experience: A Survey of Young Alumni of Single-Sex Schools* © 2016 National Coalition of Girls' Schools

**Admission Contacts**

Wendy E. Wilson • Director of Admission and Financial Aid (Grades 9-12)  
 Jessica Viner '89 • Associate Director of Admission and Financial Aid (Grades 7-8)  
 Lisa Hall '88 • Assistant Director of Admission (Grades 5-6)

For more information or to apply online, visit [www.harpethhall.org](http://www.harpethhall.org) or call 615-386-0136.

3801 HOBBS ROAD • NASHVILLE, TN 37215 • ADMISSION 615.386.0136  
[www.harpethhall.org](http://www.harpethhall.org)

HARPETH HALL.

## Card Features

Starts with key demographics, including diversity of student body

Highlights availability of financial aid

Promotes unique value of all-girls' education

Includes admission contact information for further inquiry

HARPETH HALL.

# Admissions Relies on Parents to Take Many Roles

Volunteers Often Those with the Most Time on Their Hands



## On-Campus

- Greet visitors at open houses
- Participate in panel discussions
- Tour parents around school during admissions events
- Bring friends to school events



## At Home

- Host admissions coffees, dinners, gatherings
- Answer inquiries from prospective families
- Call parents of applicants



## In the Community

- Refer prospects to admissions director
- Spread the word about school in the neighborhood
- Showcase school on bumper stickers, yard signs, school gear
- Promote school to friends, neighbors, colleagues



## Typical Parent Volunteers



Vocal about support of school



Frequent donors



Have time, motivation to volunteer



Well-connected, "in-the-know"



# Not All Advocates Raise Their Hands

Net Promoter Scores® Provide Opportunity to Identify Parent Ambassadors

## Process for Spotting Additional Advocates

### Add Self-Identification Option to Parent Survey

Give parents option to provide names so school can identify volunteers, know source of feedback

### Include Net Promoter Score®<sup>1</sup> on Survey

Use Net Promoter Score to measure parent satisfaction, enthusiasm

### Invite "Promoters" to Join Parent Network

Send personal invitation to next ambassador training session to parents scoring a nine or ten

### Sample Net Promoter Score® Question

How likely are you to recommend Brent School<sup>2</sup> to a friend?



1) Net Promoter Score is a registered trademark of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

2) Pseudonym

# Parent Ambassadors Spread the Message

## School's Parent Ambassador Network Built to Support Admissions Strategy



### Create Parent Ambassador Network, Provide Training, Ongoing Support



#### Ambassador Training

- Describe school's value proposition, power of word of mouth, importance of ambassador role for admissions
- Train ambassadors on conveying school differentiators to prospects, handling difficult questions
- Provide guidebook with key messages, sample scripting as useful resource



#### Call-to-Action

- Direct parents to seek out opportunities for conversations with prospects at children's sporting events, country club
- Direct ambassadors to encourage parents to contact Admissions Team



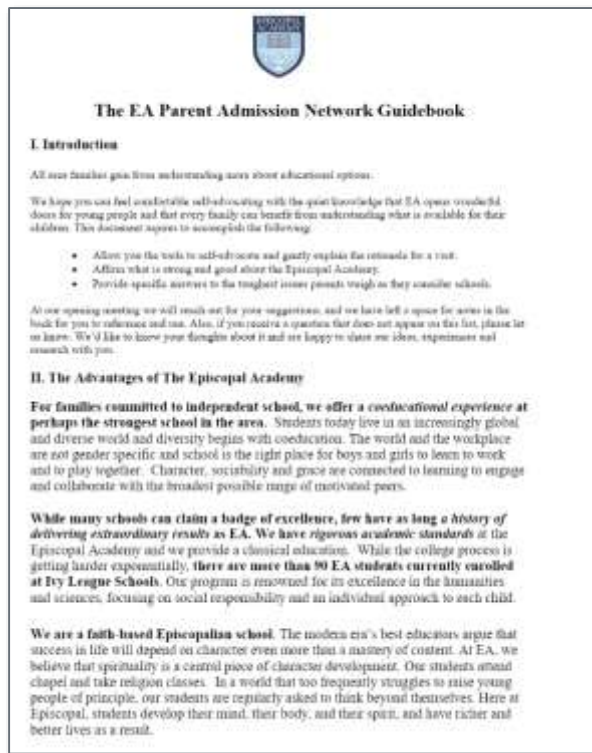
#### Ongoing Support

- Send out bimonthly "Just Good News" email blasts to parents about school events as illustrative examples of value above local competition
- Hold monthly coffee hours hosted by admissions team to keep parents engaged, informed
- Track number of referrals each parent provides to quantify ambassador impact



# Guidebook Structures Ambassador Training

## Episcopal Academy Prepares Parents to Speak Confidently to Prospects



**Three-part guidebook** used as comprehensive manual for parent ambassador training; prepares ambassadors to speak with confidence about school's value proposition



Provides section on **advantages** of Episcopal Academy, with 10 statements containing facts about school, unique characteristics, student outcomes



Third section of guidebook shares **six pages of tough questions, objections** prospective parents could raise, with a script of sample responses



**See Appendix for Guidebook**



# Empower Parents with Custom Message Toolkit

Train Ambassadors to Share Messages That Resonate

TREVOR



## Custom Messaging Resources

### Why Trevor?

Value proposition illustrated through elevator pitches using relatable examples

### Targeted Messages

20 real-life examples of grade-specific inquiry based learning

### Toolkit Resource

Three-part toolkit shared at parent ambassador training

**“First-graders** engage in a year-long study of birds. It’s not based on facts they read in books or online, it is based in their backyard—Central Park. And their study is further actualized by an partnership with experts at the Wild Bird Fund.”



### Typical Parent Messaging

“Trevor Day School uses inquiry-based learning.”

**“Third-graders** fell in love with a book they were reading and asked their teacher if they could write to the author. The teacher moved up letter writing in his curriculum to capitalize on the enthusiasm and to contextualize the lesson.”



See Appendix for Toolkit

# Social Media Preaches to the Choir

Online Content's Reach Limited to Existing Community

**School Posts Do Not Spread Brand Awareness Beyond Current Online Network**



## School Posts Message

School shares post on social media platform

## Followers See Post

School posts viewed by some community members within network

## Outsiders Not Reached

Those outside school's network do not see information about school

2%



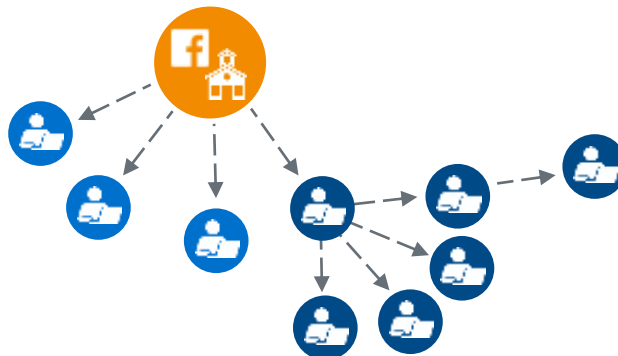
Percentage of posts organically reaching Facebook followers

Source: <https://www.business2community.com/facebook/6-studies-show-facebook-organic-reach-declining-quickly-01564179#FPLExaov4gzPeVX0.97>; EAB interviews and analysis.

# Maximize Impact of Influencers

Identify Parents on Social Media Who Share Posts, Spread Awareness

**Influencers Share School's Posts to Network of Friends, Family, Colleagues**



## Rank Top School Advocates

- Use Facebook Insights to review recent posts; identify posts with most likes, shares
- Identify individual members of school community who comment, share most frequently as influencers

## Develop Targeted Content

- Generate new content including children of influencers
- Photograph, tag children of influencers in posts; share online

## Track Shares, Comments

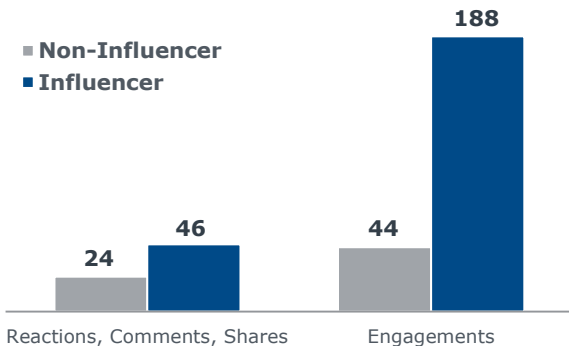
- Assess influencer-targeted posts for reach, shares, engagement

# Extend Social Media Reach

## Track Engagement to Assess Impact of Online Parent Influencers

### Influencers Who See Their Kids Share School Message More Widely

*Difference in People Reached, Shares, Engagements Between Non-Influencer, Influencer "Snowcation" Posts*



**727** People reached by non-influencer post  
**996** People reached by influencer post

### Consider Each Influencer's Reach

**"When posting, we consider each person's reach, demographics, network, line of work, the area they live in—we think about where they have buy-in.**

This is a way to reach an audience that doesn't just follow our page."

*Brooke Hummel  
 Director of Enrollment  
 Management and Financial Aid*



## **1 Guide current parents to contribute to recruitment efforts**

Ensure that current parents—who are already talking about the school—share messages and stories with their networks that reinforce the image and perception that you want to convey to prospective families

## **2 Extend social media message beyond school network**

Nudge social media influencers to extend reach of school's message by posting stories, photos, videos that they are even more likely to share broadly