



Marketing Bootcamp

WORKBOOK

About the Herzog Foundation

At the Stanley M. Herzog Charitable Foundation, we are dedicated to catalyzing and accelerating the development of quality Christ-centered K-12 education so that families and culture flourish.

The Herzog Foundation Leadership Development Series stems from our aim to provide effective and scalable models to leverage growth in Christian schools. The Leadership Development Series includes training for donor development, marketing, heads of school, board members, and teachers.

The Marketing Bootcamp is a collaboration from industry experts with backgrounds in marketing firms and in Christian education. The goal of this bootcamp is for schools to effectively tell their school's story and use it to grow their reach like-minded parents, supporters, and even donors who will fuel your ministry well beyond what we could do as a foundation alone.

In addition to our training events, the Foundation also produces *The Lion*, an online publication providing education news and perspectives on cultural issues from a Christian outlook. *The Lion* is an important resource that can be utilized to spread the impactful stories taking place in your schools and communities far and wide. Stay up-to-date at ReadLion.com.

Lastly, our school start-up platform and challenge grants exist to inspire innovative and scalable models of accessible, cutting-edge Christian education across the nation. Keep an eye on HerzogFoundation.com and follow us on social media to stay up to date with the latest opportunities with the Foundation.

Always remember, a child's education does not just come from their school, but also from their church and family. When school, church, and family all come together in a child's life, they form a biblical worldview colored by a love of God and neighbor. *You are not alone in this work; there is a movement of Christian education forming across the country.*

Jim McKenzie

Contributing Author

Jim McKenzie has taught at the elementary, middle, and high school levels in both public and private school settings. He currently serves as the Headmaster of The Rock School, a PK-12 Christian school in Gainesville, Florida, where he has been employed for the past 23 years.

Jim is also an educational speaker and consultant and has done keynotes and workshops at numerous schools and conferences. He has more than a decade of experience in coaching, training, and consulting with Christian schools across North America in the areas of marketing and enrollment through his Marketing Masterclass for Christian Schools. His teaching and training is based on best practices he has verified in his own school setting and seen replicated in other Christian schools across the country. Jim currently serves as the marketing and enrollment consultant for the Van Lunen Center, an organization that provides world-class executive management training for heads of Christian schools.

Jim is passionate about strengthening Christian schools by encouraging and equipping its leaders. He lives in Gainesville, Florida, with his wife, Hannah, and their 5 children.

Mike Farag

CEO + EVP Strategic Consulting Fervor Marketing

After years climbing the corporate ladder, Mike discovered where his heart really was while on a mission trip to Haiti. He found a passion for serving brands at the intersection of faith and business. About living out our calling through our work. And about developing healthy organizational cultures so they can succeed from the inside out. And so, Fervor was born.

Through this award-winning agency, Mike has been serving nonprofits and businesses of all sizes for 13 years so they can make a greater impact in the world. Currently, Mike and his team serve faith-led organizations in Kansas City and across the country with strategy, brand development, ongoing communication, consulting and marketing across all channels, and for a variety of industries. Under Mike's leadership, Fervor is revolutionizing the craft of helping organizations articulate their purpose, align their work, and amplify their reach - so they can do the most good possible.

In addition to being Fervor's CEO and chief vision-caster, Mike leads Fervor's business development efforts. He lives in Kansas City with his wife, Kim, and their four children.

Table of Contents

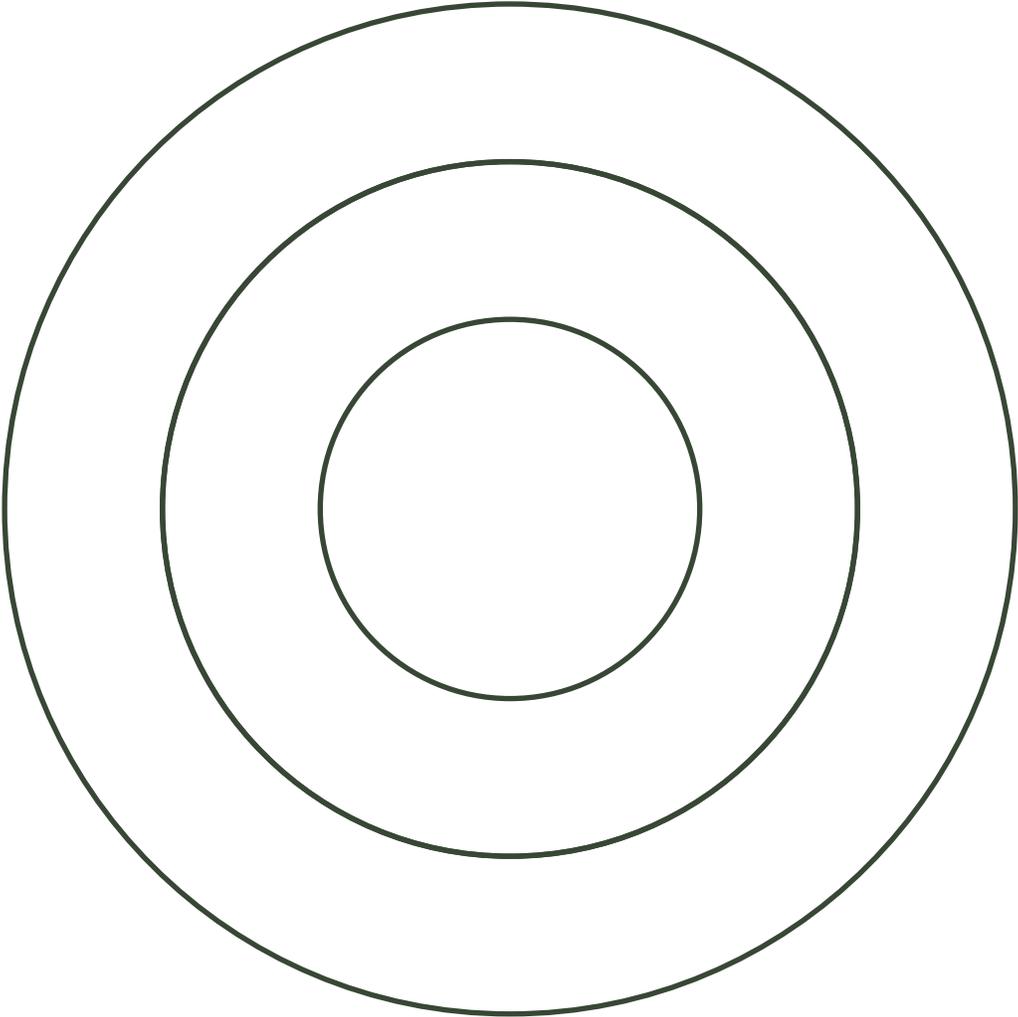
SECTION 1 <i>Clarifying Your Vision to Tell Your Story</i>	7
SECTION 2 <i>Thinking Through the Story You Tell</i>	13
SECTION 3 <i>Improving Your Enrollment Closing Process</i>	23
SECTION 4 <i>Understanding Parent Satisfaction</i>	29
SECTION 5 <i>Word of Mouth Marketing</i>	33
SECTION 6 <i>Enhancing Your Online Presence</i>	39
SECTION 7 <i>Financial Aid as an Enrollment Strategy</i>	45
SECTION 8 <i>Creating Your Marketing Plan</i>	51
SECTION 9 <i>Breakout Sessions</i>	57
<i>Resources</i>	61

SECTION 1

CLARIFYING YOUR VISION TO TELL YOUR STORY



**The Golden
Circle**



WHAT IS YOUR WHY?

SECTION 2

THINKING THROUGH THE STORY YOU TELL



How Story Works



Your Brand Should Tell a Clear Story.

(Building a Story Brand, Donald Miller ©2017, Thomas Nelson Publishers)

Your school should be the _____, not the _____.

The student is the _____.

YOUR THOUGHTS:

Understanding Audience

List 10 reasons why families choose to enroll their children in your school (what is their motivation)?

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

Two Audiences for Christian schools:

- | |
|----------|
| 1. _____ |
| 2. _____ |

Crafting the Message

#1: Write for a specific _____.
_____ - a group of people who have common characteristics.

Christian schools usually have 3-5 personas. What are some of yours?

1. _____
2. _____
3. _____

Write more like _____, less like _____.

Write more like a _____, less like a _____.

#2: Write in terms of _____, not _____.

F: High Educational Standards

B: _____

F: Strict Classroom Discipline

B: _____

F: Modern, High-Tech Classrooms

B: _____

Crafting the Message

#3: Stop thinking like a _____.

COMMODITY

_____ & convenience
_____ are crucial.
We're " _____ "
_____ about us!

UNIQUE SERVICE

Value / connects to _____
_____ is crucial.
We're " _____ "
_____ to know us!

In what ways does your school position itself as a commodity?

What steps can be taken to change that?

Two Strategies for Differentiation

#1: Flanking vs. "Me Too" Branding

"Me Too" branding - _____.

Flanking - _____.

- Having a "difference" that is truly _____.
- Having a difference that _____ care about.

#2: Proactive Customer Service

Book: *How to Get Your Competition Fired (without saying anything bad about them)*

Summary: Figure out what your competition isn't _____ and then _____ yourself.

WHAT ARE SOME EXAMPLES OF FLANKING OR PROACTIVE CUSTOMER SERVICE YOU ARE DOING (OR COULD BE DOING) AT YOUR SCHOOL?



ACTION PLAN

THINKING THROUGH THE STORY YOU TELL

1. Review your marketing materials (print, digital, other):

- Who is the hero of the story you are telling?
- You want the students to be the hero of the story, but that means more than just having pictures of kids in your materials. What story is in the text?
- Are you positioning yourself as a commodity or as a unique service?
- A commodity is about price and features. Do your materials include lists of features or do they tell a story? A unique service is about building value through customer service. Is a positive school experience emphasized in your materials?
- Re-write features in terms of benefits. Remember, to a prospective parent, features can sound expensive, but benefits create value.
- What kind of voice is used – do you sound like a Wikipedia page or a Mom Blog?

2. Consider brainstorming with your leadership team answers to the questions posed in this session:

- What makes our school unique?
- What can't/won't our local schools do well?
- Then, begin thinking about flanking opportunities for your school. What is something that would be important to parents that you can excel at that your local schools can't?

SECTION 3

IMPROVING YOUR ENROLLMENT CLOSING PROCESS



SPIN Selling



*"Selling is no longer about persuasion.
Selling is about understanding your
customer's problems and solving them."*

Neil Rackham, Spin Selling, 2004

S

P

I

N



ACTION PLAN

IMPROVING YOUR ENROLLMENT CLOSING PROCESS

1. Review your current enrollment closing process:

- What happens when someone calls? Walks-in? Sends an email?
- Who do prospective parents meet with? What do they do? What happens at the end of the visit? What's the follow-up process?
- Train office staff (and anyone who answers the phone) in the correct procedures for handling enrollment inquiries. Provide scripts to guide them.

2. Move from Tours to Educational Consultations.

- Remove the word "tour" from all print, website, and signage.
- Remove the word "tour" from your vocabulary and the rest of the admissions and office staff. Remember, tours make the facilities the hero of the story.
- Set up a calendar system so that the office staff can schedule appointments with the principal when prospective parents call to inquire.
- The role of the Admissions Director (seen as the salesperson by prospects) is to administrate the enrollment process, but it is the duty of the Principal (seen as the educationalist) to meet with prospective families. In larger schools with multiple administrators, the parents should meet with the principal over the school their child will enroll in (i.e. the third grade parents meet with the elementary principal).



ACTION PLAN

3. Implement the SPIN selling protocol during Educational Consultations.

- Practice role playing SPIN selling so that you can be comfortable using it with prospective families.
- Remember, the tendency is for us to talk too much and listen too little. Use the SPIN questions to guide parents in their decision-making.
- Don't forget the "I" question (Implication) – this is the question that really helps parents think through the importance of their decision.
- Once you understand what their biggest need/desire is for their child's education, you are better prepared to elaborate on those things as you talk with the family and show them around your campus.

4. Track all leads using a Lead Capture Form. Keep information in a spreadsheet for periodic review.

- Track everything! Use a form to write down every lead – that's every phone call, email, Facebook message, and walk-in.
- Do not let your staff jot these down on sticky-notes or scrap paper and pass them to you or your admissions staff. Do not direct people to leave messages on voicemail. Capture the lead immediately.
- At a minimum, ask for name, phone number, grade level(s), and how they heard about your school. Don't ask for unnecessary information you won't use. (If you're not going to mail stuff, don't ask for an address.)
- How did you hear about us? Get specific. If they say "a friend," ask "Who specifically may we thank?" If they say "I heard you on the radio," ask "What station were you listening to?" This detail will help in planning future marketing efforts as well as help identify who your best promoters are.

SECTION 4

UNDERSTANDING PARENT SATISFACTION



Why It Matters

Parent satisfaction is the key to both _____ and _____.

Two questions we can ask:

Satisfaction Question (JD Powers): "On a scale of 0-10, with 10 being the highest, how satisfied are you with [name of school]?"

_____ - Advocates

_____ - Apathetics

_____ - Assassins

The Ultimate Question (Fred Reichheld): "On a scale of 0-10, with 10 being the highest, how likely are you to refer [name of school] to others?"

_____ - Promoters

_____ - Passives

_____ - Detractors



(% of Promoters) minus (% of Detractors) = _____.

SECTION 5

WORD-OF-MOUTH MARKETING



Working with Your Promoters

IDENTIFY

→

TRAIN

→

REMIND

→

THANK

IDENTIFY PROMOTERS

Use a _____ or _____.

TRAIN PROMOTERS

Host a reception for your promoters _____ times per year and teach them:

1. What to _____ for.
2. How to make a referral by asking for _____, _____, and _____.

REMIND PROMOTERS

Keep it _____ and build a culture of _____ in your school. Report to your promoters _____.

THANK PROMOTERS

Send _____, make _____, and host _____.

What about financial incentives?



ACTION PLAN

WORD-OF-MOUTH MARKETING

1. Identify your promoters:

- Use a survey tool to formally identify your promoters.
- Use a school directory and a group of faculty and go through and highlight those who you know to be “raving fans.”
- Don’t forget to think about those outside your current families – alumni, past parents, board members, and church members (if church-affiliated) and include them on your list.

2. Organize a promoter event.

- Hold a Promoters’ Reception three times a year (Jan/Feb, May/June, Sept/Oct).
- Get a staff member or some volunteers to plan a fun, but simple party.
- Remember, this is a Reception, not a meeting!
- Send out invitations to your promoters. Traditional invitations are better than letters or emails. Emails or phone calls from the office staff to remind parents a few days beforehand are helpful too.
- How many to invite? 40 is a good goal for attendance (more is always better). You probably need to invite 60-70 in order to get 40 to show up.
- Create an agenda for the evening. (A sample is provided in our digital toolkit.)

SECTION 6

ENHANCING YOUR ONLINE PRESENCE



Your School Website

The primary goal of your website is to generate _____.

Call-to-Action: " _____ "

Use information as a _____.

The secondary goal of your website is to make _____
for Christian education.

Tip #1: Don't give them a reason to _____.

Tip #2: Don't give them a reason to _____.

The right strategy is two platforms:

1. Prospective Families - the goal is _____.
2. Current Families - the goal is _____.

Search Engine Optimization (SEO) - use a website crawler to audit your website's SEO.

YOUR THOUGHTS:

Digital Marketing

EMAIL MARKETING - create a _____
for prospective families.

SOCIAL MEDIA

_____ percent of word-of-mouth referrals happen online.

Millennials: _____ offline WOM | _____ Social Media recommendation

FACEBOOK

Promoted Posts - _____ a post for an upcoming event,
relevant blog post, or noteworthy news.

Lead Ads - created a _____.

Pixels - use this retargeting tool to reach people who have already visited
your _____.

YOUR THOUGHTS:



ACTION PLAN

ENHANCING YOUR ONLINE PRESENCE

1. Review your current website for content and appearance:

- What's the audience for the existing content? Current families, prospective families, mixed?
- What are the Calls-to-Action (CTAs)? Remember, good CTAs should encourage site visitors to call or visit to learn more.
- Who's the hero of the story of your website?
- Are there reasons to say no? Are there reasons to stay home?
- Are there good quality photos of people? (That's what you need!) Are there pictures of buildings and facilities? (That's a big no-no!) Are you using stock photography (i.e. photos off the web)? You need to use real photos of your school community instead.

2. Develop a clear strategy for your website and implement it.

- Remove content not aimed at prospective families.
- Write compelling text for the home page that tells your story succinctly.
- Create a "steps to take" that clearly outlines for parents what should happen step-by-step.
- Put your phone number prominently on every page (above the fold).
- Have direct Call-to-Actions on every page (call to schedule an appointment or visit us for a walk-in day.)
- Have your site reviewed by outsiders, either by asking people in the community to do it or through a paid service online.



ACTION PLAN

3. Evaluate your website's Search Engine Optimization (SEO).

- Most website builders fail to provide adequate SEO strategy in the initial design.
- Use a free resource - Screaming Frog - to do an SEO review of your site. (Just download the app and enter your URL).
- You should have keywords in every page's titles and meta descriptions at a minimum. If these fields are blank or just have the school name or navigation (i.e. "Home Page") for all of them, get your site manager to update these.
- We've provided an example of these keywords and meta descriptions in the digital toolkit.

4. Set up a Google Analytics account and use it to capture data about your website.

- Visit google.com/analytics and create a free account.
- Copy the code for your website from your Google account and paste it into the html code of each page of your website. (Get your webmaster to do this for you if you don't know how.)
- Review your Google Analytics data each quarter to see where your web leads are coming from and what pages people are visiting. Review how long they are on your site and where they tend to leave your site from. Use this to make adjustments to your website content.
- There are some great resources online about using Google Analytics. There are also companies that will set it up for you and provide detailed reports and recommendations to you on an ongoing basis for a fee.

SECTION 7

FINANCIAL AID AS AN ENROLLMENT STRATEGY



Financial Aid Challenges

How much financial aid did your school award last year?

Problems with the status quo:

1. _____
2. _____
3. _____

The gap in educational costs is often made up by _____ making less than high-income _____ who could afford to pay.

	TUITION < FULL COST	TUITION = FULL COST
LITTLE FINANCIAL AID	<p>LOW TUITION, LITTLE FINANCIAL AID</p> <p>Attracts MIDDLE income</p>	<p>FULL-COST TUITION, LITTLE FINANCIAL AID</p> <p>Attracts HIGH income</p>
SIGNIFICANT AID	<p>LOW TUITION, SIGNIFICANT FINANCIAL AID</p> <p>Attracts LOW income</p>	<p>FULL-COST TUITION, SIGNIFICANT FINANCIAL AID</p> <p>Attracts ALL income levels</p>

Financial Aid Recommendations

Does financial aid need to be funded? _____

Does financial aid need to be budgeted? _____

Do we have to rigidly follow this budget? _____

Recommendations:

1. Adopt a _____-like model.
2. All financial aid decisions are made by _____.
3. Practically all financial aid is _____-based.
4. " _____ " go away.

Advantages:

Financial: _____ families are now paying the full-cost to educate their child which provides money for _____ families to be served.

Marketing: Overcome the price question with the availability of much more aid. It's the difference between _____ and _____.

YOUR THOUGHTS:



ACTION PLAN

FINANCIAL AID AS AN ENROLLMENT STRATEGY

1. Review the four quadrants of the financial aid & tuition model.
 - Where does your school best fit?
 - If you're not already in the quadrant reflecting full-cost tuition with plenty of financial aid, what will it take to get your school there?
2. Determine your ACTUAL total amount of financial aid awarded.
 - Remember, aid is every dollar less than the full cost of tuition that a parent is not required to pay.
 - This includes staff discounts, ministry discounts, multiple child discounts, pay-in-full discounts in addition to any needs-based aid or scholarships that are not fully funded by some other source.
 - How much aid would qualify as "automatic discounts"?
 - Once you have "your number," be sure that it is included anywhere that tuition is mentioned.
 - On print material, on your website (if still published there), in phone conversation and in-person meetings with prospects.
 - "Tuition next year is \$7500, but we also have over \$300,000 in financial aid available. We'll tell you how to apply when you visit."



ACTION PLAN

3. Implement the following changes (if not already in practice at your school.)
- Make tuition “full-cost” - in other words, it’s not what we think people will pay, but what we need to charge to provide the education we desire. Set a plan to get to this amount over a reasonable, but aggressive, period of time.
 - Eliminate automatic discounts. Bolster financial aid to provide additional needs-based support to families who are negatively impacted by the loss of the automatic discounts (i.e. families with 3 children, etc.)
 - Partner with a third-party company to evaluate all financial aid decisions. Except for staff discounts (which can be viewed as an employee benefit), all financial aid should be needs-based.
4. Create a clear plan for how aid will be awarded at your school.
- When do parents apply and how?
 - When will aid be awarded and how?
 - How will parents be notified?

YOUR THOUGHTS:

SECTION 8

CREATING YOUR MARKETING PLAN



Marketing Calendar

ONGOING:

JANUARY

FEBRUARY

MARCH

JULY

AUGUST

SEPTEMBER

Marketing Calendar

ONGOING:

APRIL

MAY

JUNE

OCTOBER

NOVEMBER

DECEMBER

Marketing Priorities

List your top 5 priorities you want to address when you return to your school:

	Priorities	Tasked To?	Completed By?
1			
2			
3			
4			
5			

SECTION 9

BREAKOUT SESSIONS



BREAKOUT #1 KEY TAKEAWAYS:

BREAKOUT #2 KEY TAKEAWAYS:

NEXT STEPS FOR LESSONS LEARNED:

RESOURCES



Fervor Website Scorecard Audit

URL: _____ DATE REVIEWED: _____

CATEGORY	1-10	NOTES
<p>DEFINED PURPOSE Your organization's purpose is obvious, precise and unique. Why do you exist? What are you doing to make an impact? Visitors to your site need to know right away.</p>		
<p>CLEAR DEFINITION OF WHOM THE SITE IS FOR It's obvious who this site is designed for, and all aspects were built with the ideal audience in mind. Your ideal audience should feel at home on your site.</p>		
<p>CALL TO ACTION Visitors know what you want them to do. They came to your site, now what? A simple, specific call to action engages your people.</p>		
<p>NEW AND ENGAGING CONTENT New content, published on a regular basis, keeps the site living and breathing. Content is optimized for search engine impact, and it's targeted at the folks your organization needs to reach.</p>		
<p>DESIGNED TO WIN The site looks good, sounds good and is designed for a best-in-class user experience. Hey, looks matter.</p>		

Fervor Website Scorecard Audit

CATEGORY	1-10	NOTES
<p>SEO AUDIT</p> <p>The site is optimized for search engines and Google can find your organization. We all have issues, even websites – but identifying and repairing those issues is</p>		
<p>WEB ACCESSIBILITY</p> <p>Web Content Accessibility is a growing need in today's online climate. Guidelines (WCAG), including WCAG 2.0 and WCAG 2.1 have been introduced in order to ensure people with disabilities and challenges can access online content. This grade subjectively reviews a site's access to those guidelines.</p>		
<p>SITE LOAD TIME</p> <p>Your site loads quickly and free of errors. We're all in a hurry these days. When it comes to your website, you can't be the turtle – you've gotta be the hare.</p>		
<p>TIME ON SITE</p> <p>High time on site indicates that your content and site is actually connecting with your key audience. It's important that they show up, and it's important that they stick around.</p>		
<p>SOCIAL + EMAIL INTEGRATION</p> <p>The site makes it easy for people to connect through social media and to sign up for your email list. This is how your visitors can become your advocates.</p>		

Additional resources &
samples materials can
be found at
[herzogfoundation.com/
marketing-toolkit](https://herzogfoundation.com/marketing-toolkit).



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