The Essential Education Marketing Plan Template

An Interactive Workbook

BROUGHT TO YOU BY

PROSPER
STRATEGIES

You know you need to get smart and strategic about marketing if you want to take your education company to the next level.

However, when you start to think about building a marketing plan, perhaps you're daunted by the blank canvas that lies before you and you don't know where to begin. Worse yet, you're so busy with new tasks and projects that you haven't had a moment to slow down and get strategic. You're justifying the absence of a marketing plan with the fact that you're just. too. busy.

Guilty?

We hear you. Luckily, this workbook is the perfect solution for your marketing plan paralysis. Put your planning cap on because the worksheets that follow will help you put an education marketing plan in place over the course of just a few focused hours.

No excuses allowed.

Gather your team and get ready to work your way through this marketing plan template-and-workbook-in-one. When you're done, you'll have a smart, easy-to-follow roadmap that will guide your education company toward more impact in the year ahead. Are you ready?

Let's go!

1.
Goals and Objectives
(where are we going?)

Goals and Objectives

Consider goals and objectives to be the *destinations* in the roadmap you're about to create. If you don't know where you're going, we can promise you aren't going to get there. So before you do anything else, list your company's top three marketing goals and objectives for the year ahead.

What's the difference? A goal is a general, qualitative statement about what you want to achieve, while an objective is a quantitative, time-sensitive measure of that goal. For example, one goal might be to build an online community of fans or supporters for your company, while its corresponding objective would be to grow your social media following to 1,000 engaged members by March. Your marketing goals should be tied closely to the larger, strategic business goals for your company.

You've heard it before, but it bears repeating: your goals and objectives should be S-M-A-R-T: specific, measurable, achievable, realistic, and timely. It's cliché, but it works.

Top three goals...	Top three objectives...

2.
The Target
(who must we reach?)

The Target: Definition

Here's one of the most important and often forgotten facts about marketing: whether you succeed or fail depends largely on how well you connect with people. This is especially true for education companies, where everything you do has the potential to impact student success. But, you can't *really* connect with people in an effective, strategic way until you understand your target.

Do you know who your target is? The general public is not an acceptable answer, nor is a list of every single stakeholder that your company might come in contact with. In the space below, brainstorm a list of anyone you might consider a potential target for your marketing efforts, and then narrow that list down to the **three** most important groups and circle them below. The more focus you have, the more powerful your efforts will become.

Our potential targets include...

The Target: Ranking

Now it's time to rank those stakeholder groups so you can decide who to focus on first, second and third with your marketing efforts. Rank each group you defined on the last sheet based on the criteria below. The group with the highest number in column four should be your primary target, and you can determine your secondary target and tertiary target by looking to the groups with the middle and lowest scores, respectively.

	1. Potential impact on your company's future success (1-10)	2. Receptivity to Marketing/Communication (1-10)	3. Influence on other key groups (1-10)	4. Total from Columns 1-3
Stakeholder Group 1 _____				
Stakeholder Group 2 _____				
Stakeholder Group 3 _____				

The Target: Profiling

Defining and ranking your target stakeholders is a great start, but if you want to connect on a deep level, you need to get to know these people intimately. You need to understand their personalities, likes, dislikes, and yes, what they enjoy doing on a Friday night. They must become real, living and breathing people in your mind. On the next few pages, you'll create stakeholder profiles like the ones below that will bring your targets to life.

Note: this example is for the primary target of a new school fundraising organization.
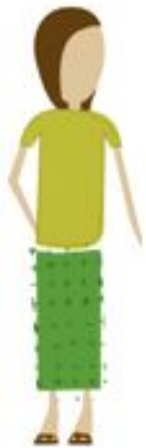
Name
Amy
Age
38
Job
Dental assistant
Married?
Yes, to a personal banker
Kids?
Twin 6-yr-old daughters, 8-yr-old son
House or apartment?
House
City or suburbs?
Mid-sized city

What is her personality like?
Sincere, kind, outgoing, giving and selfless

What are her major beliefs?
All children deserve a good education; our children are the key to our future; I want to do everything I can to give my children good experiences

What is her biggest pet peeve?
Spending precious time trying to support her kids' schools and seeing few results

What does she love to do on a Friday night?
Takeout and a movie

What does she love to do on a Sunday morning?
Church, brunch with her family, swim lessons with the kids

What does her typical day look like?
Squeezes in a workout if she's lucky (rarely happens), gets her kids and self ready for the day, drops them off at school and then goes to work until 3. Makes a quick run to local pizza joint to pick up dinner, feeds the kids, shuffles the girls to gymnastics and back, attends a volunteer meeting for an upcoming school field trip that she's chaperoning and cleans up around the house before heading to bed. Her days are very full!

What keeps her up at night?
Trying to balance all the commitments in her life without sacrificing anything that she feels her kids deserve, keeping her family on a budget

What keeps her up at night related to our brand?
She knows her children's' school needs improvements, but she's tired of old fundraisers that are uncomfortable and get minimal results

How do these problems make her feel?
Frustrated, helpless, annoyed

How do we solve her problem?
We provide an easy, natural fundraising opportunity for her children's school that fits into her daily routine and allows her to personalize her fundraising activity to fit her life while saving her $$ in the process!

How does our solution make her feel?
Empowered, at ease, smart, relieved. "I don't know why someone didn't think of this a long time ago!"

The Target: Profiling

Create your own stakeholder profiles like the one on page eight in the space below.

PRIMARY TARGET

Name

Age

Job

Married?

Kids?

House or apartment?

City or suburbs?

What is his/her personality like?

What are his/her major beliefs?

What is his/her biggest pet peeve?

What does (s)he love to do on a Friday night?

What does (s)he love to do on a Sunday morning?

What does his/her typical day look like?

What keeps him/her up at night?

What keeps her up at night related to our company or its purpose?

How do these problems make him/her feel?

How do we solve his/her problem or serve as a resource?

How does our solution make him/her feel?

The Target: Profiling

Create your own stakeholder profiles like the one on page eight in the space below.

SECONDARY TARGET

Name

Age

Job

Married?

Kids?

House or apartment?

City or suburbs?

What is his/her personality like?

What are his/her major beliefs?

What is his/her biggest pet peeve?

What does (s)he love to do on a Friday night?

What does (s)he love to do on a Sunday morning?

What does his/her typical day look like?

What keeps him/her up at night?

What keeps her up at night related to our company or its purpose?

How do these problems make him/her feel?

How do we solve his/her problem or serve as a resource?

How does our solution make him/her feel?

The Target: Profiling

Create your own stakeholder profiles like the one on page eight in the space below.

TERTIARY TARGET

Name

Age

Job

Married?

Kids?

House or apartment?

City or suburbs?

What is his/her personality like?

What are his/her major beliefs?

What is his/her biggest pet peeve?

What does (s)he love to do on a Friday night?

What does (s)he love to do on a Sunday morning?

What does his/her typical day look like?

What keeps him/her up at night?

What keeps her up at night related to our company or its purpose?

How do these problems make him/her feel?

How do we solve his/her problem or serve as a resource?

How does our solution make him/her feel?

3.
Brand Values

(why do people choose to take a desired action that your education company aims for?)

Brainstorm

Brainstorm all of the reasons why your customers and stakeholders choose to take the actions you desire, like purchasing your product, utilizing your services, engaging in one of your programs, or telling their friends and neighbors about your company.

Brand Values

On the previous page, circle all the words you wrote that represent potential brand "values." These are usually adjectives.

Use the examples below, which are pulled from Mindsharp, a (fictional) edtech app for games that challenge and strengthen memory, critical thinking, grammar and other skills for learners of all ages and levels.

Value 1
ex) Proven to improve test scores

Value 2
ex) Makes learning fun

Value 3
ex) Comprehensive

Value 4
ex) For all learning levels

4.
The Message
(what should we say and how should we say it?)

The Message: Defining Key Messages

Now we're really rolling. You know where you're trying to go and who your stakeholders are. The next step is packaging all the work we've done so far into a set of key messages that will help you make all of your marketing efforts consistent and effective.

Effective key messages are...

- **Original:** Unique and specific to your company in order to differentiate it from others

- **Short:** Long-winded and complicated messages are harder to remember. Keeping key messages short also makes them more adaptable

- **Limited:** Only a few (3-4) per audience

- **Audience-centric:** Focused on the specific needs, interests and preferences of each target stakeholder group

- **Linked to values/benefits:** Focused on the values you deliver and the benefits your company offers to various stakeholders

- **Jargon-free:** Simple and easy for the average stakeholder to understand

The Message: Key Message Examples

Before you get to work on creating your own set of key messages, study the example below.

Stakeholder Group	Brand Values/Benefits			
	Proven to improve test scores	Makes learning fun	Comprehensive	For all learning levels
Grade school student parents	When used regularly, Mindsharp's challenging, educational games that improve memory and critical thinking skills have been proven to help students like your child achieve higher scores on standardized tests.	Because Mindsharp's educational exercises are gamified with points and goals, your child won't notice that their learning, they just know they're having fun.	Mindsharp offers games for STEM, grammar, art, history and general memory tests so no matter what subject your child is most interested in or wants to learn, there are games to help them do so.	Whether your child is a high achiever or needs a little extra help, the Mindsharp app offers difficulty levels that are comfortably challenging and effective.
High School students	When used regularly, Mindsharp's challenging, educational games that improve memory and critical thinking skills have been proven to help students like you achieve higher scores on tests like the ACT and SAT.	Because Mindsharp's educational exercises are gamified with points and goals, you'll barely notice that you're learning.	Mindsharp offers games for STEM, grammar, art, history and general memory tests so no matter what subject you're most interested in or want to learn, there are games to help you do so.	Whether you are a high achiever or could just use a little extra help on a particular subject, the Mindsharp app offers difficulty levels that are comfortably challenging and effective.
Teachers	When used regularly, Mindsharp's challenging, educational games that improve memory and critical thinking skills have been proven to help students like yours achieve higher scores on standardized tests.	Because Mindsharp's educational exercises are gamified with points and goals, your students won't notice that their learning, they just know they're having fun.	Mindsharp offers games for STEM, grammar, art, history and general memory tests so no matter what subject your students are most interested in or want to learn, there are games to help them do so.	Whether your students are high achievers or need a little extra help, the Mindsharp app offers difficulty levels that are comfortably challenging and effective.

The Message: Writing Key Messages

Next, try writing your own set of key messages below. List your company's values along the top, and your top three stakeholder groups down the left side. Then, develop a message about each value for each stakeholder group. This will take several shots to get right, and you should run it by others at your company for feedback, if possible.

Stakeholder Group	Brand Values/Benefits			
	_____	_____	_____	_____
_____				
_____				
_____				

5.
The Tactics

(what will we **do to reach our target and our goals**?)

The Tactics: Timing and Progression, The Stakeholder Journey

Educate

Engage

Activate

The Tactics: Choosing Your Tools

There are **so many** ways to bring those key messages you just created to life. It's easy to get overwhelmed by the myriad of marketing tactics that everyone is telling you to pursue. Should you be focused on search engine marketing or search engine optimization? Events or publicity? Direct mail or email? It's enough to make your head spin. All of these tactics can be valuable, but trying to do too much at once is a recipe for disaster.

We've worked with enough education companies to develop a strong opinion about the tactics that are most effective *and* most accessible for small or early-stage education companies.

If that describes you, we recommend focusing on 6-8 of the items from the short list of tactics below. Of course, if you already have some of these things in place, or you've moved beyond the "beginner" phases of your marketing work, you should feel free to add in some other tactics of your own.

Circle the tactics you plan to focus on this year, or add some of your own.

educate

- ★ Create downloadable ebooks and white papers to educate people about your cause
- ★ Create and share educational content with your social networks
- ★ Blog
- ★ Conduct media outreach
- ★ Develop a regular enewsletter
- ★ Speak at industry events

engage

- ★ Illustrate your story through those you impact
- ★ Start conversations with targets on social media
- ★ Nurture leads with email marketing
- ★ Host events where your stakeholders rally in support
- ★ Submit for award opportunities and other recognition

activate

- ★ Gather testimonials
- ★ Build an advocacy page on your website and give your supporters tools to spread the message
- ★ Host social media contests
- ★ Distribute special offers
- ★ Create opportunities to get involved with key initiatives

other

- ★ List your own ideas…

The Tactics: Choosing Your Content

Just as important as choosing your tools is determining your content. As you're thinking about the best way to educate, engage and activate your targets, you'll want to study your target personas. Think about what might resonate with them during each phase of their interaction with your company and aim to create content accordingly. Here's an example:

educate

During the education phase, think about content that will resonate with a target who doesn't know about Mindsharp yet.

engage

Once your target knows who you are and what you do, how will you keep them interested and engaged with Mindsharp?

activate

Educated and engaged targets are more likely to buy and use Mindsharp. Do you have content that helps them do this and then some?

educate

★ How Test Scores Have Fallen Over Time: An Infographic

★ Mindshare Monthly - a monthly enewsletter about Mindshare happenings

★ Launch Mind Matters Mindshare Blog

engage

★ Mindshare Success Stories - the profiles of people we've helped

★ One-pager - Why you should never stop learning

★ #MindMatters social media campaign discussing the importance of making learning fun

activate

★ Access free trial Mindshare games and get hooked

★ Share with us why you use Mindshare and what you've learned using #MindMatters

The Tactics: Choosing Your Content

Based on the example on the previous page, define a few pieces of content you could create at each phase of the stakeholder journey.

educate	**engage**	**activate**
During the education phase, think about content that will resonate with a target who doesn't know about you yet.	Once your target knows who you are and what you do, how will you keep them interested and engaged?	Educated and engaged targets are more likely to buy and use your product or service. Do you have content that helps them do this and then some?

6.
The Calendar

(how will we schedule our marketing activities and hold ourselves accountable?)

The Calendar: Mapping Your Tactics

Next, you need to decide what needs to be accomplished when. We've provided a framework to help you fill in the following information for your education company.

- Goals and Objectives
- Target
- Call-to-Action
- Key Message
- Events
- Content to create/release
- Tactics to Pursue
- Responsibilities
- Measurement Practices
- Budget

In a following slide, we've also provided an example month for you to refer to for each phase of the stakeholder journey.

	1. EDUCATION EXAMPLE MONTH	2. ENGAGEMENT EXAMPLE MONTH	3. ACTIVATION EXAMPLE MONTH
KEY GOAL/OBJECTIVE	Educate new audiences and re-engage stakeholders	Engage supporters and increase donor-base	Meet quarterly fundraising goals
TARGET GROUP TO FOCUS ON	Donors and volunteers	Donors and volunteers	Donors and volunteers
KEY CALL-TO-ACTION	Learn more about Turning Point and our goals for 2015	Get involved in the issues that Turning Point focuses on: poverty and homelessness	Run in the 5K or donate
MONTHLY MESSAGING THEME	Turning Point Basics and 2015 Plans	Hunger and Homelessness in Brooklyn	The Path to Happy, Healthy Brooklyn Families
EVENTS	Yearly Kickoff Event	Volunteer and Community Roundtable	Annual 5K
CONTENT TO CREATE/RELEASE	Release Hunger and Homelessness infographic	10 Ways to Get Involved with Turning Point in 2015 - Checklist	Develop ebook to demonstrate how our programs impact the community
TACTICS TO PURSUE	- Relaunch blog with focus on stories about real Brooklynites and tips for raising a happy, healthy family in Brooklyn - Build targeted Twitter lists of influencers - Conduct media outreach around infographic - Begin bi-monthly newsletter to share success stories and keep supporters engaged	- Create stakeholder video story campaign - Launch our own #BetteringBrooklyn Twitter Chat - Start an email nurture campaign to share stories of programs and those they impact - Submit for Top Nonprofits of New York Award - Launch engagement-focused social media ads	- Create landing page specifically dedicated to donors and send ask - Create downloadable web badge for organizational supporters to use on their websites to show support - Conduct campaign leveraging enews and social networks encouraging supports to Tweet why they donate using #BetteringBrooklyn
WHO'S RESPONSIBLE FOR WHAT?	Monica - Kickoff event planning and logistics Eric - Twitter list building and media outreach,. e-newsletter Kristen - Infographic content creation and promotion	Monica - Roundtable event planning and logistics Eric - stakeholder story campaign, Twitter chat launch, email nurturing campaign Kristen - Checklist content creation and promotion, award submission	Monica - 5K event planning and logistics Eric - Landing page, web badges, #BetteringBrooklyn campaign Kristen - Ebook content creation and promotion
WHAT'S THE BUDGET?	$5,000	$6,500	$10,000
HOW WILL WE MEASURE SUCCESS?	# of infographic downloads Newsletter Subscriber Growth Growth and engagement of Twitter Followers	# of checklist downloads Success of #BetteringBrooklyn chat Attendance at Community Roundtable Email performance	# of ebook downloads 5K turnout and donations #of badge downloads Total donations - Q1 2015 Traffic to fundraising landing page

	JANUARY	FEBRUARY	MARCH
KEY GOAL/OBJECTIVE			
TARGET GROUP TO FOCUS ON			
KEY CALL-TO-ACTION			
MONTHLY MESSAGING THEME			
EVENTS			
CONTENT TO CREATE/RELEASE			
TACTICS TO PURSUE			
WHO'S RESPONSIBLE FOR WHAT?			
WHAT'S THE BUDGET?			
HOW WILL WE MEASURE SUCCESS?			

	APRIL	MAY	JUNE
KEY GOAL/OBJECTIVE			
TARGET GROUP TO FOCUS ON			
KEY CALL-TO-ACTION			
MONTHLY MESSAGING THEME			
EVENTS			
CONTENT TO CREATE/RELEASE			
TACTICS TO PURSUE			
WHO'S RESPONSIBLE FOR WHAT?			
WHAT'S THE BUDGET?			
HOW WILL WE MEASURE SUCCESS?			

	JULY	AUGUST	SEPTEMBER
KEY GOAL/OBJECTIVE			
TARGET GROUP TO FOCUS ON			
KEY CALL-TO-ACTION			
MONTHLY MESSAGING THEME			
EVENTS			
CONTENT TO CREATE/RELEASE			
TACTICS TO PURSUE			
WHO'S RESPONSIBLE FOR WHAT?			
WHAT'S THE BUDGET?			
HOW WILL WE MEASURE SUCCESS?			

	OCTOBER	NOVEMBER	DECEMBER
KEY GOAL/OBJECTIVE			
TARGET GROUP TO FOCUS ON			
KEY CALL-TO-ACTION			
MESSAGING THEME			
EVENTS			
CONTENT TO CREATE/RELEASE			
TACTICS TO PURSUE			
WHO'S RESPONSIBLE FOR WHAT?			
WHAT'S THE BUDGET?			
HOW WILL WE MEASURE SUCCESS?			

The Calendar: Mapping Your Tactics

The following resources can help you put your plans in motion:

- WordPress - website development tool
- Gravity Forms - WordPress form tool
- MailChimp - affordable email marketing
- Sidekick - Real-time intelligence about website visitors
- Google Analytics - data on digital activity
- HubSpot Blog topic generator
- Cision EdCals
- Pixelmator - graphic design
- Piktochart - Infographic development
- Pages or Powerpoint - ebook design
- Hootsuite - social media community management
- HubSpot or SharpSpring- YOUR ALL-IN-ONE SOLUTION

7.
Evaluation
(how will we know what's working?)

Evaluation: Determining What Works

All of this planning work will be wasted effort unless you put a tool in place to determine what's working and what's not. The key measure you choose to track will be closely tied to the objectives you set up at the beginning of the workshop. See an example evaluation table below, and then create your own on the page that follows. You should check in at least every month, if not more, to see how you're tracking against your objectives. Then, do more of the things that are working and eliminate the things that are not. **Simple, but effective.**

Examples:

OBJECTIVES	HOW WE'LL EVALUATE
★ Increase social media engagement by 50%	★ Total the number of times we post to social media each month, and then divide by the number of replies, likes, shares and clicks we receive to determine total engagement. Compare month-over-month.
★ Increase referral traffic to our website by 20%	★ Use Google Analytics to see how much traffic increases month-to-month, and then look at the referral sources to determine how many referrals were the direct result of our marketing efforts
★ Get ten new clients	★ Ask all new client referrals how they heard about us (both with online forms, on the phone and in person) and track in a spreadsheet over time

Evaluation: Determining What Works
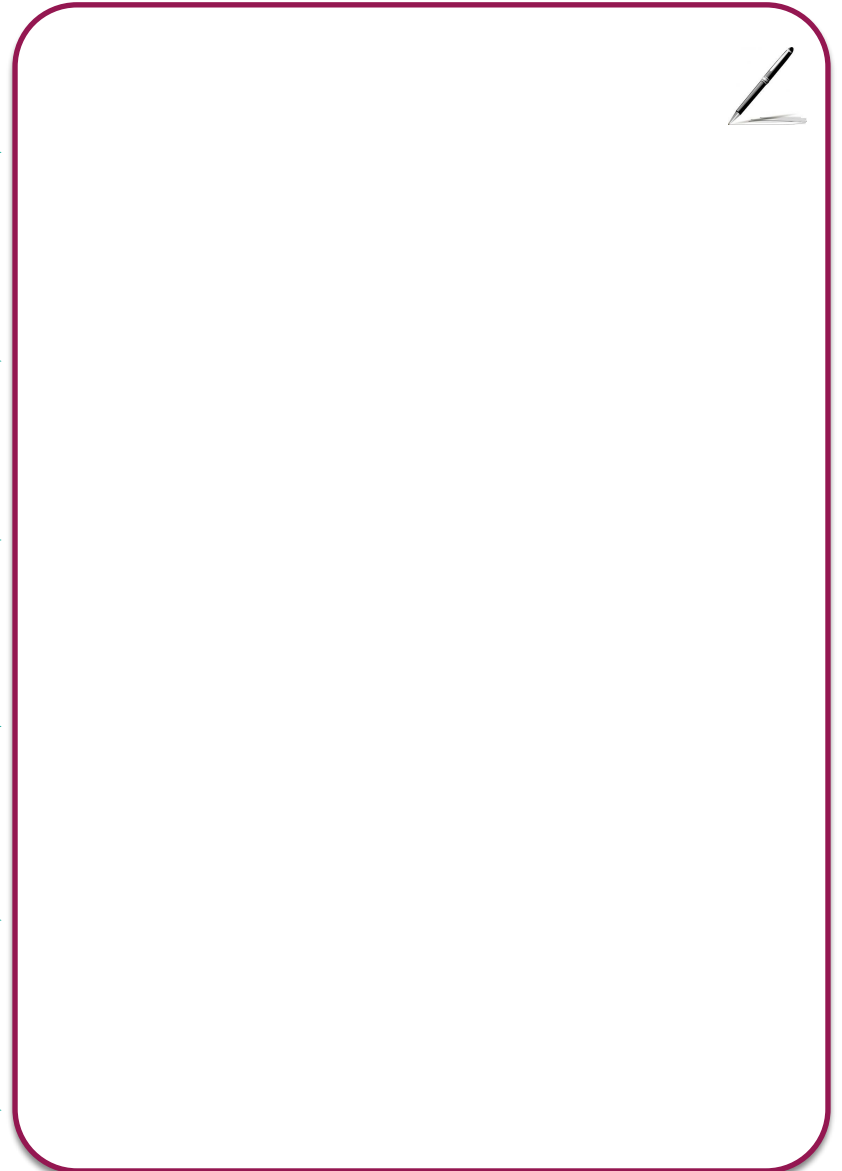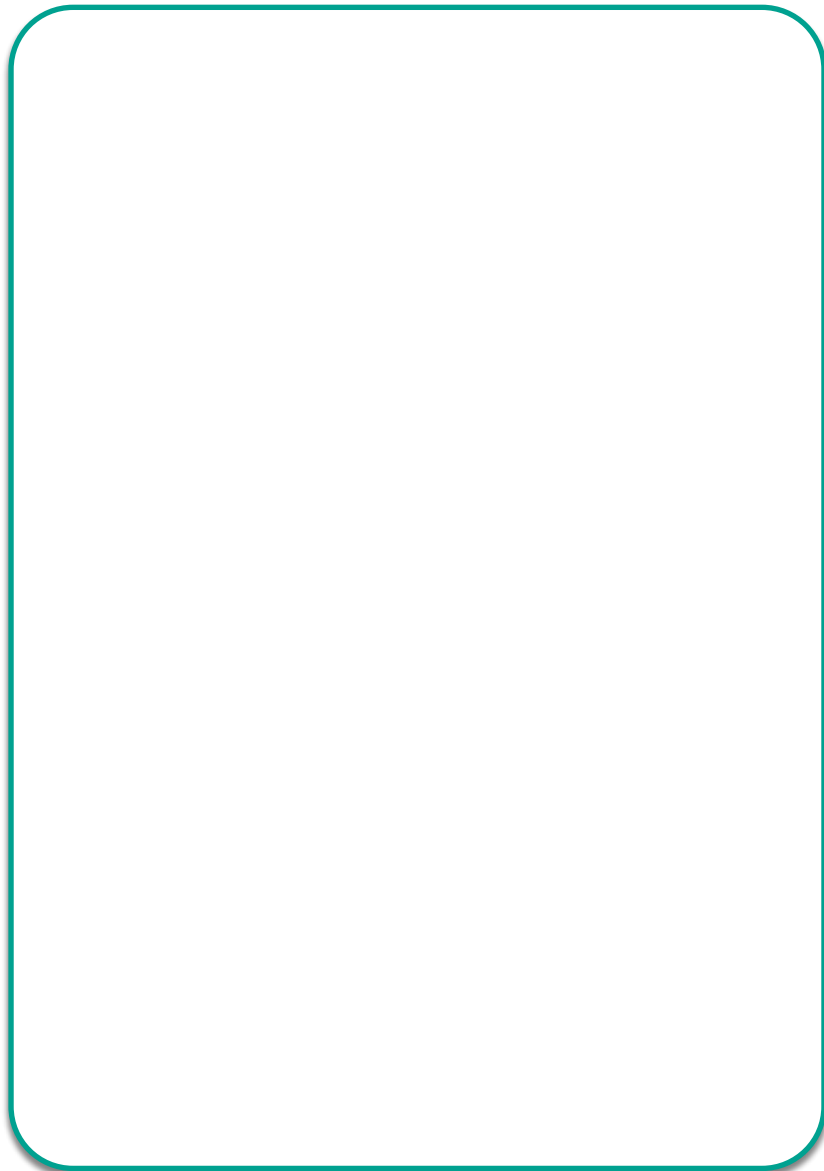
Congratulations, rockstar!

Go high-five your co-workers and treat yourself to something special, because **you're done!**

Share this simple, but super effective plan with your team tomorrow and then **get to work!**

Here's to making a greater impact for your education company in the year ahead!

Want more?

visit prosper-strategies.com/blog for a weekly dose
of education marketing inspiration and advice,
and if you want to take your efforts to the next level,
contact us at hello@prosper-strategies.com or 312.955.0926.