Marketing Plan Tool and Activity Calendar

Develop Marketing Campaigns

Few of your charter staff will have experience with marketing, so work closely with them to generate buy-in and make the process painless. Because most parent interactions happen at the school level, staff members need to understand the school's mission and know how to talk positively about the charter to successfully recruit students. A supportive staff is important to implementing a successful marketing campaign.

Developing a marketing plan with built-in assessment for each marketing activity will help you know the school's current situation, and where it should be by the end of the school year. Keeping your recruitment objectives at the forefront of each marketing activity will help you ensure success and measure its effectiveness. This section and the next will walk you through the process of planning and implementing marketing campaigns.

Develop Objectives and Build In Assessment

Tool: Marketing Plan

Use the Marketing Plan tool to lay out your strengths, weaknesses, opportunities, and threats—SWOT—and list your marketing objectives and activities. Include a mission statement to help frame the marketing plan.

1. To conduct the SWOT analysis, list points under each of these categories.

   • **Strengths** are advantages or resources that make your school unique in comparison to the other schools in the area. This may include your charter theme, community partnerships, distinctive instructional activities, diverse student body, teacher quality, or high parent involvement.

   • **Weaknesses** are any challenges you must overcome. Challenges may include lack of staff buy-in, a negative school image due to low academic achievement, or lack of student transportation.

   • **Opportunities** are favorable circumstances that help you to enter the school choice market and recruit. These may include increased interest in your charter theme, the availability of a partnership, or increased interest in school choice.

   • **Threats** can hinder your recruitment success. Threats may include a highly competitive school choice market, increasing segregation in the community, or loss of funding or a partnership.

Figure 3. Example of completed section of Marketing Plan Tool

Marketing Plan Tool
Mission: To provide an equitable charter education.
SWOT analysis
• Strength: We are the only STEM school in the community.
• Weakness: We have a reputation in the community for low academic achievement.
• Opportunity: The community has an increasing interest in STEM.
• Threat: Another school in the community will implement STEM next year.

Phase of funnel	Marketing objective	Marketing activities
Prospects	Increase community's ability to recognize school's brand.	• Redesign logo and website. • Coordinate all materials to reflect new image. • Put up new school sign that emphasizes charter theme.
	Increase community's knowledge of school.	• Hold informational meetings at local events, such as church gatherings and association meetings of businesses that need STEM- educated employees.
		• Discuss the school's mission, role in community, teacher quality, curriculum, STEM partnerships, and opportunities associated with having STEM education, if appropriate.
		• Distribute informational materials with call to action, such as take a school tour.

2. Based on your SWOT analysis, meet with your charter team to identify five to seven objectives to accomplish this school year. Choose objectives that play to strengths and opportunities, and that will help you overcome weaknesses and threats. For example, the objectives in figure 3 align with the SWOT analysis. We suggest setting an objective for each phase of the funnel to help you meet your target student recruitment numbers.

3. Determine what marketing activities will help you bring in the necessary numbers of students at each funnel phase. You may have multiple activities planned to achieve one objective. As you track each marketing activity over time, you will be able to chart its effectiveness.

Definition
Marketing campaign: A series of structured activities designed to achieve a specified goal, such as increasing brand awareness or driving attendance at an open house.

Tool: Activity Calendar

Take the activities from the Marketing Plan tool and plug them into the Activity Calendar tool as presented in figure 4. Be sure to create a separate calendar for each month.

1. Schedule each activity and set goals to determine its success. Consider important school events and holidays, and plan activities around them. Document these events under the Special Notes column in figure 4.

2. Set at least one specific, measurable goal for each activity and track activity data to determine its effectiveness. Use the Activity Assessment tools to help track data.

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Figure 4. Example of completed Activity Calendar Tool

Activity Calendar Tool Month: June 2017				
Completion date	**Activity**	**Staff assigned**	**Goals**	**Special notes**
June 10	Hold informational meeting at Community Interfaith Church	Jane Doe	To increase 10 or more community members' knowledge of school. To distribute informational materials or encourage five or more attendees to tour the school in August.	
June 30	Redesign logo	John Doe	To increase logo brand awareness to 80 percent.	

The Activity Assessment tools vary by type of marketing activity. Each tool will help you organize an activity into steps that move toward the goals set in the Activity Calendar.
The Activity Assessment tool will help to track implementation progress and budget expenditures, and measure success against the goals. The tools included in this kit are for events, e-mail/direct mail, and logo redesign, but can be adapted to any type of activity. An example of a completed Activity Assessment for events is presented in figure 5.

Figure 5. Example of partially completed Activity Assessment Tool for Events

Activity Assessment Tool					
Event					
Activity: Hold informational meeting event at Community Interfaith Church					
Goal: To increase 10 or more community members' knowledge of the school					
Steps	**Due date**	**Date completed**	**Budget allocated**	**Budget expended**	**Outcomes**
Design invitational mailing	Aug 1	Aug 02	$500	$400	Under budget
Print mailing (500)	Aug 10	Aug 12	$1,000	$1,200	Over budget, a little late
Post invitational announce on website	Aug 12	Aug 12			
Send mailing to prospects (500)	Aug 15	Aug 15	$350	$245	Under budget
Send e-mail to those who have inquired (100)	Aug 15	Aug 15	N/A	N/A	
Create meeting agenda	Sep 01	Sep 05	N/A	N/A	A little late

Follow these steps to the complete the tool.

1. First, list all the steps that must occur for the event to take place.

2. Write in the total budget, and itemize the cost for each event expense.

3. Working backward from the date of the event, create a realistic due date for each step.

4. As the steps occur, fill in the date completed, expended cost, and outcome.

5. At the end, do a final assessment of these items to measure the entire event's success.