

## **Creating an Effective Education Marketing Plan**

How to Make Your Sales Number and Stretch Your Marketing Dollars

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Could you use a tool to give you confidence that you will meet your sales goals and maximize your efficiency? Of course you could! Couldn't *everybody*?!

Yet, many companies don't take time each year to create an effective marketing plan. Some companies question the value of planning. Others develop a list of tactical activities and a budget, which I call an "action plan." A tactical plan (a list of trade shows, direct mail, ads, etc.) is better than nothing, but mostly good for FedEx and Tylenol. I have found tactical marketing plans are stressful for those who suffer the consequences, maybe you? Do you market by fire drill? The staff of the typical marketing department runs at a frantic pace, responding to "gotta-do" opportunities and rushing to meet tactical deadlines without a strategic context. Stop! A wellconceived marketing plan lets you spend more time acting than reacting. And importantly, when someone asks "why" you are spending your time and money on a marketing program, you'll have a response that makes sense.

### **Steps to create a plan and regain control!**

- 1) Take stock of changes in the Education Markets Start by stepping back.** It's easy to make assumptions about your competitors, market position, your customer's needs, and the desirability of your products. While your head's down on tactical matters, opportunities may slip by. Interview your customers and non-customers, sales reps, and channel partners. Do internet research. Gather the latest school technology market reports. Increase your confidence that you understand the current situation even if you think you understand it.
- 2) Size up your opportunities It's opportunity-du-jour.** But you need objective criteria for prioritizing and knowing what new opportunities to say NO to and to say YES to. It is easy in the midst of tactical work to blow off good opportunities or to try to do too much. You know, the calls you get from various suppliers offering you this and that. We often respond with "Our budget is already committed" or "I am too busy," or in this day of voice mail, you don't respond at all. You may not know what opportunity slipped passed you or otherwise spin your wheels. So, how do you focus your marketing dollars for the highest return? First, mine your sales database for information. Characterize your most profitable customers-demographically and psychographically. Identify all factors which correlate to purchasing potential. Understand which products sell best and why.
- 3) Pause and reflect Every company has its strengths and weaknesses.** Exploit your strengths. Only create programs you or your channel partners can implement effectively. Avoid situations that interfere with your ability to implement and get the results you want.
- 4) State your objectives.** Considering your strengths, decide on three or four major, measurable, doable marketing objectives to meet next year's market opportunities and differentiate your company and products from the competition. Each objective should have a measurable metric and be put within a reasonable timeframe. Then seek consensus within your organization. Don't develop objectives like "Increase Awareness of our New Internet Teaching Resource," or "Develop New Education Channels" or "Generate qualified leads for whatever."

## How will you know if you succeeded?

5) **Determine how you'll meet your objectives.** Decide on the strategies to meet each objective. Your choices should uniquely position your company and products with the goal of gaining a commanding share in targeted school market segments. It is better to focus your energies to get a beachhead than attack the masses and spread yourself too thin.

6) **Create your tactical plan.** For each strategy, there are many investment options and no simple rules for allocating them. Examine historical results and do more of what worked. Don't be wooed by a sales pitch or be tempted to mimic your competitors. Tight budget? Focus only on a few initiatives and channels. Determine goals, components, human resources, budget, and schedule for each marketing program. Finally, reserve 10% of your total budget for unexpected opportunities and expenses. Review the tactical plan with your sales team, your managers, and make sure everyone is on board and understands what you'll expect from them for the plan to work. Buy-in is absolutely critical.

7) **Post a milestone calendar.** Chart your activities so you can see how your programs fit together and align with sales activity. A visual summary helps you anticipate resources you'll need to meet your deadlines. You can do this with a spreadsheet program and color printer if you don't have more sophisticated tools. Or, post the calendar on the web and update it every week.

8) **Review and Update your plan at the end of each quarter.** Your plan should be adjusted quarterly to account for your competition, shifts in purchase patterns, legislative initiatives, new technologies, etc. Allow flexibility to accommodate the unforeseen.

## The journey is the reward

Your planning process should involve all stakeholders – especially your sales channels. When everybody provides input, you'll have a unified effort and get much better results. Share the completed plan with the entire company and your partners. Everyone should understand your strategies, why resources are allocated the way they are, and what each person's role is in successfully executing the plan.

“The essence of marketing is to do more of what works and less of what doesn't.”

Early in my career, a marketing expert I respected told me his philosophy of marketing: If you throw enough \*\*\*\* against the wall, some of it sticks. Over the many years I've been marketing technology products to schools, I've thought about that advice and I fully believe it's true. Every initiative you do isn't going to be a success. You'll have more failures than successes. Marketing is art and science and it is much about predicting human behavior, something that is inherently unpredictable. You have to be persistent and realistic and when you find something that's working, do more of it.

## Learn from your successes and your failures

Perhaps the most important reason to have a yearly, written marketing plan is to give you a tool for improving year after year. Without clearly established, measurable strategies, you will never learn from your success or failure.

### **Get the Help of an Outside Expert**

I've helped many companies develop marketing plans. Often when I propose this idea to prospective clients, this added expense is questioned, or internal marketing managers believe asking for outside help is a sign of weakness. There is an attitude of doing what I was hired to do. Most often, what senior execs want of the marketing staff is to drive the business and to help create equity. And sometimes the very best thing you can do is get the perspective of an outsider and a fresh set of eyes. I can tell you that in every case I've worked with marketing managers to develop a marketing plan, the question of the added expense is moot by the end of the process. The savings in added efficiencies, focus, and most importantly the results of the marketing programs that flow from the plan more than offset the expense. A solid plan is not an expense, it is an investment in your future, driving efficiency and effectiveness. Good luck, and good planning! Just do it!

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