

*Introduction:*

*The following is an abbreviated synopsis of notes, references and links from my talk, “Cool Tools & Killer Aps for the 21<sup>st</sup> Century Administrator”, which was delivered at the 2012 AMI USA Refresher Course in Fort Worth. Feedback about the presentation has been positive and I am pleased to deliver something of value to other Montessori administrators. I have learned many things from other Montessorians via MAA and the Google Group and I am happy to return the favor.*

*Please note that the slides and notes are made available for attendees of the RC and MAA members and may not be duplicated, sold, published, etc. without permission. Please contact me with any questions at [Matt@BergamoSchools.com](mailto:Matt@BergamoSchools.com).*

## **Cool Tools and Killer Aps** *(the quick and dirty notes)*

This presentation is an extension of my previous effort, “The Yellow Pages Are Dead”, which was given at the 2011 AMI USA Refresher Course in Long Beach.

My goal is to provide practical and actionable tools and resources to:

- Get them in (enroll mission appropriate children)
- Keep the ones you have (maintain low attrition)
  - Practical means that they are not beyond the skill set of most administrators (i.e. non technical)
  - Actionable means the barriers to entry are low (free, low cost, etc.)
- This presentation is targeted at the medium size independent Montessori schools – the “Jan Brady” of the bunch.
  - Such schools generally have an enrollment of 100-300 children. They are large enough for parents to have high expectation of the school (i.e. web based tools, communication features, etc.) but are not big enough to have a full time communications director, marketing coordinator and the like.
- Being the “middle child” is hard and sometimes makes us “act older” than we really are by emulating older (larger) schools. Such disjointed efforts by overworked and inexperienced admins can result in embarrassing failures.
- My goal is to provide easy-to-use tools and resources to be like a larger school along with pertinent advice and context for their use.

I have bad news for you. Your school is a business. This knowledge is essential to your success in marketing your school.

“Business” can be a bad word amongst many educators and Montessorians. Why?

- The term is contrary to the self perception of our teachers. Most of us chose Montessori as a career path because it is something we believe in, not to make money.
- Education is a basic human right in our culture and it can feel strange to combine that concept with business
- “Education” is already provided by the government for free.
  - Guess what? The public schools are a business as well.

A business is an organization engaged in the trade of goods, services or both to consumers. Businesses may be profit, not-for-profit or state owned.

Your school is a service business! Consumers pay us tuition for the services we provide their child and family.

Marketing a service business is challenging because its perceived value can vary widely from person to person. Some families may sacrifice everything they have to afford your school. Other families would never choose to spend money on education, let alone Montessori education.

Successful Montessori schools recognize the fact that they are a service business and clearly identify their target market in all of their advertising campaigns.

Beyond the challenges of marketing a service business, Montessori schools have several other disadvantages:

- We have a 40 year history of bad marketing practice at both the local (school) level and the national level.
- Our customers don't “get us”. Montessori philosophy does not fit into the educational world view of our society
- Because the term “Montessori” is not trademarked, many of our customers are confused or misinformed about authentic Montessori practice.

BUT – we have come a long way!

- Marketing at the national level has improved by leaps and bounds over the last few years.
  - [www.AidtoLife.org](http://www.AidtoLife.org)
  - [www.MariaMontessori.com](http://www.MariaMontessori.com)

- Social media efforts
- The world view of education is changing. In the last 18 months, there have been more positive articles about Montessori education in the mainstream media than any other period in our history.
  - In some ways, the financial crisis of 2008 was the best thing that could happen for our movement, as it forced people to rethink their views about education, employment and the future.
- We offer the best service in the marketplace.

Matt's theory: Targeted marketing (before + after the "sale") + stellar service = full enrollment

Defining your target market is essential to success. Only spend money on marketing/ads that reach people who could/will enroll in your school.

At Bergamo Montessori in Sacramento our target market is:

- Female (mothers make decisions about early childhood education)
- 28-45 years of age
- Has a child between 0-4 years of age
- Household income of \$100,000+
- Lives within 20 miles of the school

This demographic has nothing to do with the admissions process, in which we engage both parents. Rather, the demographic represents the group to whom our ads are targeted.

Targeted marketing before the "sale" (getting them in)

- Google Ad Words
  - This is, by far, out most effective tactic besides word of mouth. I recommend that you hire a consultant to optimize your campaign. Don't farm this out to a parent or staff member. Please see separate presentation slides from John McLellan.
- School website
  - The ONLY purpose of your site (from a marketing perspective) is to have the viewer take an action to deepen your relationship
    - Call/email for a school tour
    - Request a brochure/follow up
    - Sign up for your mailing list/subscribe to school blog/fan on Facebook
  - Avoid jargon – don't try to sell Montessori education via your site. Save that for the admissions process.
  - Remove all barriers to the visitor taking the "next action"

- Make the site as personal as possible – visitors need to know that there is another person on the other end. Use pictures of your staff, admissions director etc. to emphasize the human connection.
- Prominently link social media channels
- Use compelling images (more on this later)

Don't delegate your website design to a teacher or parent. Hire an experienced professional.

- Direct Mail
  - Mailing postcards or sales letters can be highly effective as you can pinpoint your efforts to a target market.
  - Buy a mailing list at [www.infousa.com](http://www.infousa.com).
    - List can include all demographic features listed above
      - Note that you will have to submit a sample of your mailer in advance for InfoUSA to release a mailing list that involves households with children.
  - Online printers will often print, address and mail the pieces for you. They can also store the mailer onsite to mail out at predetermined intervals – i.e. you print 15,000 postcards that are mailed out to a 3000 person list 5 times over a period of time.
    - Be sure to add the school's name/address to the list (which is delivered to you as an Excel file) so that you receive the mailer as well (and know if/when they are being delivered)
  - Postcard design
    - You have 3 seconds to make an impression with the customer before she tosses it in the trash
      - Use a compelling image and headline (only!) on the front
      - Brief copy and a call to action on the back
        - Remember: don't try to sell Montessori education in the postcard. Your goal is to get them to take another step (call, visit website, etc.)
  - Direct mail is a numbers game. You must mail to your list 5-6 times to see results. A 1% response rate is very successful. 3000 person list x 1% = 30 inquiries.
  - Reputable online printing houses
    - [www.printpelican.com](http://www.printpelican.com)
    - [www.vistaprint.com](http://www.vistaprint.com)
    - [www.psprint.com](http://www.psprint.com)

Don't delegate your mailer design to a teacher or parent. Hire an experienced professional.

Be sure to keep track of your inquiries. ALWAYS ask "how did you hear about our school" when new customer inquire. This information is essential for you to measure the effectiveness of your campaign.

- Social media
  - Is a great marketing tool because
    - It is free!
    - The majority of social media users are female (our target demographic)
  - [www.EdSocialMedia.com](http://www.EdSocialMedia.com) is a terrific resource for schools to learn about the use of social media.
  - All schools should be on Facebook
    - This IS something you can farm out to a staff member. Be sure to chose someone who is already a heavy Facebook user
    - Make sure that the account is created with a school email address (i.e. [Matt@BergamoSchools.com](mailto:Matt@BergamoSchools.com)). The email address that registers the account "owns" it. If the employee leaves the school, and used a personal email (yahoo, gmail, etc.) to create the account, you have no right to your school's page! Facebook customer service DOES NOT EXIST.
    - Reserve a vanity URL (i.e. Facebook.com/BergamoSchool)
    - Post images & video of classrooms and children
      - Add a clause to your enrollment agreement that allows the school to post images of the children. Parental attitudes about use of images online have changed drastically over the past few years. Make parents "opt out" rather than "opt in"
    - Good examples of Facebook use at Montessori schools:
      - [www.Facebook.com/CobbSchool](http://www.Facebook.com/CobbSchool)
      - [www.Facebook.com/thebaandekmontessori](http://www.Facebook.com/thebaandekmontessori)
      - [www.Facebook.com/BergamoSchool](http://www.Facebook.com/BergamoSchool)
  - All schools should have a YouTube Channel
    - Is a Google product. Can/will impact Google searches
  - All other social media channels may not be useful for you, unless you already are an experienced user. The time required to learn and use a tool will not be worth the result.

- Quality images are essential to your marketing efforts
  - Don't use a point and shoot camera. Invest in a DSLR camera to produce images with depth and character. Prices have come down considerably for these types of cameras over the past few years.
    - Costco has great deals on DSLR cameras. [Check out the options here.](#)
  - This IS something you can delegate to a parent or staff member (taking images)

#### Targeted marketing after the sale

- Do whatever it takes to keep your attrition levels under 10%
- Communicate with parents to “prove” what you promised during the admissions process
  - Value for parents exists in their perception of their child’s experience at the school. Our job is to provide them accurate information and feedback to help craft that perception.
  - Parents enter our school inspired about Montessori education... but that can fade. Inspiration is like bathing – the effects are temporary and we need to provide it on a regular basis
- Common breakpoints exist in all Montessori schools. Target the information you distribute to parents to support them through this process.
  - Common breakpoints include most times (or preparation for) change:
    - Toddler transition to Primary
    - 2<sup>nd</sup> year Primary students thinking about “Kindergarten” options
    - 3<sup>rd</sup> year Primary students thinking about Elementary options
    - 3<sup>rd</sup> year Elementary students transitioning to Upper Elementary
    - 5<sup>th</sup> year Elementary students thinking about middle school options.
- This year at Bergamo, we started at “Monthly Mailer” program in which we mailed targeted information to families once a month, in addition to a school and classroom newsletter.
  - As most of our communications have moved to digital formats, snail mail feels more formal and is harder to ignore (IMHO)
  - We created a simple spreadsheet list that grouped children by “breaking points” and included specific information targeted to the needs of the family at that point in time.
    - We made extensive use of the plethora of recent positive Montessori articles in mainstream media as objective social proof about the efficacy of our method.

- We also made a point to “sell” the next classroom/experience. I.E. all Primary parents receive information about the happenings in the Lower Elementary classrooms.

Stellar service means that administration anticipates the needs of parents, staff and children. Here is a collection of cool tools that will help you to do that:

- Backpack: you don’t need to have a school intranet any more. Backpack keeps us organized and helps our staff communicate. What I like about Backpack:
  - We can share calendars and reminders amongst all staff
  - We have a staff discussion forum instead of email chains for communication
  - We can create pages to make lists, write policies and procedures etc.
  - It is web based and accessible from any computer with an internet connection.
  - It is drop dead simple to use (essential for technophobes!)
  - Read more about it at <http://backpackit.com/>
- Dropbox: Simple and easy to use, Dropbox helps us share common files and eliminates the need for a school network. Free to use (up to a storage limit). Read more at: [www.Dropbox.com](http://www.Dropbox.com)
- Grovo: Has it ever been frustrating to get your staff up to speed on web based tools? Grovo has been a great solution; it allows us to outsource training for common applications and programs that are essential to a modern office. Read more at [www.Grovo.com](http://www.Grovo.com)
- Mailchimp: Mailchimp allows us to send out pretty HTML emails (nicely designed emails with images) to our parents for our weekly update. We can also track who opens/doesn’t open their emails along with a host of other metrics. Completely free. Read more at [www.Mailchimp.com](http://www.Mailchimp.com)
- Onebox: You no longer need to spend thousands of dollars on a PBX system to answer and route your calls. We pay \$49.99 a month to have a centralized answering service and voicemail for our staff. Other neat features:
  - It sends a text message to notify you when you have a voicemail and then emails an MP3 of the message (I listen to the message on my Iphone)
  - It can route your calls to any phone, in any order (through the “find me, follow me” feature)
  - Has a call recording feature (check to make sure that this is legal in your state)
  - Includes a web based fax feature with a local phone number (get rid of that extra phone line for the fax machine!). Faxes are routed automatically to your email inbox. Send a fax using the Onebox site.
  - You are automatically assigned a 800 number that is free to use
  - Read more about these features (and many more) at [www.OneBox.com](http://www.OneBox.com)

- AT&T DECT Phone System: Forget about wiring. The new DECT wireless standard has TREMENDOUS range – we get almost ½ mile range with our system (note that also purchased the range extender). This system allows us to have a four line phone base in the office and handsets in each classroom.
  - The handsets in the classroom are fully functioning phones that can access any of the four lines, but they are set not to ring for incoming calls. Teachers can make a call out, if needed, but the classroom will not be interrupted by calls.
  - If a call comes in for a teacher (and he/she needs to take it) the receptionist will place the caller on hold and page the classroom handset (we set the tone to a low “blurple” that doesn’t interrupt the work period). When the classroom handset is answered, the office can notify the teacher that they have a call on hold.
  - Each handset can page any other handset in the school to use as an intercom (we have 10 handsets + the base).
  - There is a “broadcast” feature that can make an announcement on the speaker phone of each handset – we use this for fire drills and emergency situations.
  - You can upload a MP3 file to the phone system to play music any time a caller is placed on hold.

We bought this system through Amazon.com. [You can find it here.](#)

Expensify: We just started using this so I can’t comment about it yet.... but it looks fantastic.

- Allows guides/staff to submit expense reports online which are then sent automatically to admin.
- Staff can use any smart phone to take a picture of receipts –the expensify application saves the receipt as a PDF and attaches it to the relevant expense report. Staff can then dispose of receipts.
- Once the report is approved online, admin can reimburse the guide via ACH, directly into his/her bank account.

Read more about it at [www.expensify.com](http://www.expensify.com)

- Tom Peters: Mr. Peters is a well known business consultant who wrote an influential book in the 1980’s entitled “In Search of Excellence”. He shares many terrific bits of advice for creating a well run organization at his website [www.TomPeters.com](http://www.TomPeters.com). His videos serve as my daily inspiration and I watch one each morning before heading to work.