The NAIS Enrollment Management Handbook

Your guide to successful strategies for student recruitment, retention, pricing, research, technology, marketing, and branding.

Whether you’re new to enrollment management or just want to fine-tune your program, this handbook offers wise counsel on broad strategies as well as tactics you can put to use immediately. Expert authors bring the unique independent school perspective to advice about how to:

- Structure your enrollment management operation for results
- Make smart use of tuition setting, financial aid, and institutional discounting to reach enrollment and revenue targets
- Lay the foundation for success through institutional research, strategic marketing planning, brand stories, and technology
- Coordinate recruitment and retention so your school doesn’t lose hard-won students at re-enrollment time
- Ensure your enrollment management is streamlined, not siloed — a school-wide approach from the time families first learn of your school until their students graduate

The Enrollment Management Handbook is ideal for professionals in admissions, financial aid, development, communications, and marketing. But it’s also must reading for heads of school and division heads and deans. As NAIS President Pat Bassett writes, “Boards rightly expect their heads to be experts about enrollment management, the golden goose of our business. The challenge for deans and division heads is, if anything, greater... creating the conditions for student and faculty success that make re-enrollment almost a given.”
competitors or because the ways in which they are talked about are too similar. The school misses opportunities to clarify and communicate what is truly special about it.

Ridley’s branding process revealed the following assets as both most authentic to Ridley and most compelling to its target markets in the context of its competitors, whether local or global, day or boarding:

- prestigious reputation, history, and ethos;
- the feeling among students, parents, and alumni — especially in Canada — that Ridley graduates are “set for life” as if they had found the golden ticket by coming to Ridley;
- high academic quality;
- global community, vision, and ambition;
- a unique-to-North-America British-system House culture and magnificent campus (a key factor in the competition with U.S. schools);
- talented school leadership;
- faculty quality and enthusiasm;
- a full spectrum of co-curricular opportunities (art, music, service, leadership, athletics);
- student and parent satisfaction and pride; and
- an involved and engaged community of students, faculty, staff, and parents.

To be clear, other schools may have individual assets that Ridley has. But it is the way these single attributes connect and enhance one another that will help to create a unique package to set the school apart. (More on this in the next section.)

Ultimately, the strategy behind your brand story needs to answer this question: What makes your school worth investing tuition dollars — and worth investing a family’s hopes and dreams for their children? For Flint Hill, the sweet spot is relentless quality that explains how the school does so many things so well. For Ridley, the sweet spot is the idea of the golden ticket or brass ring — that graduates are set for life if they go to this school. That is a powerful value proposition. The work of Ridley’s brand story is to prove that this belief among its students, parents, and alumni is real and true.

III. The art of a winning brand story: 10 essentials

There’s a definite art to developing a compelling brand story. Although the cre-
ativity and, in some cases, sheer luck of a great brand story can’t be completely explained, the following building blocks will go a long way to ensuring that your school story hits the sweet spot and generates success in admission, fund-raising, and overall reputation.

1. **North star.** The most successful brand stories are inspired by brilliant leadership at the very top — the head of school. She or he may not have the words to articulate the story or recognize all the elements of the most advantageous story, but his or her vision fires it. The school may hire a creative team to develop the story, and it definitely needs strong board members and a talented senior administrative team to power the brand forward. But the head must lead the way. In the case of both Flint Hill and Ridley, the heads of the institutions set the vision and played a substantive role throughout brand story development.

2. **Protagonists and plot.** Every campus’s brand story is a mythic archetype with mythic heroes: the revolutionary; the discoverer; the change agent; the smart, brave doer. As you begin a branding process, look from your school’s founding to its present for the plot lines in the institution’s big story — plot lines that make your heart beat faster, that have elements of risk and excitement. For Flint Hill, this was the Husky Promise. Once you understand the big story, everyday heroes will reveal themselves as well: students, faculty, and alumni who live and embody the brand. For example, think about the Flint Hill lower school students who live the Husky Promise “in big ways as they get older.” They are the everyday heroes.

   They are students who embrace their own driving spirit.

3. **Powerful beginnings.** Good stories open by drawing the audience in emotionally, sometimes with childlike anticipation. But even intriguing openings should act as practical “doorknobs” that, with a turn, allow the reader to enter the story’s world. (Flint Hill: “One of the first things visitors ask us is how do you do so many things so well? . . . The answer is, ‘We’re driven.’”) Some of the most effective openings can be both emotional and practical: “This is the way education should be.” “Take a bold step.” “Coming here was like seeing the entire world all at once.” “Put yourself in the way of opportunity.”

4. **Brand chapters.** So you’ve got your audience hooked. Now what? You have to deliver a good story. Look back at the list of assets that made up the third circle in your sweet spot diagram. The chapters in your brand story should evolve from this list. Compelling brand chapters are often combinations of more generic attributes that enhance one another and resonate with what your market
wants. Consider a Quaker school that wants to communicate the highest academic standards in a field of other rigorous institutions. Academic rigor does not distinguish the school, but “academic power with a conscience” does. For a mid-Atlantic boarding school competing with New England schools, the school’s Southern civility in a world-class East Coast city is a compelling juxtaposition. Meanwhile, an unpretentious K–8 school feeding into the most selective high schools and competing with more expensive and elite institutions offers families a “right-sized powerhouse.”

Well-run schools have a handful of these combinations that affirm in unique ways the quality, success, and extraordinary opportunity families are looking for. But be disciplined. Your brand story should have at most six chapters but preferably four or five. More than that and it’s difficult for your audience to absorb and retain your story. In the case of Flint Hill, its brand chapters are Students First, Relentless Quality, Game-Changing Innovation, Living the Husky Promise, and Purpose-Built Campus.

5. **Compelling language.** Compelling language is a key factor in the appeal of your brand chapters. The best source of such language is often the school community itself. Here are examples of phrases that parents, teachers, school heads, and students have used that inform brand stories: “The genius of our founder’s vision.” “Small by design.” “Priceless moral compass.” “Nursery school to rocket fuel.” “Phenomenal placements.” And “Queen bees who share the stage.” These are all real things real people have said in focus groups about their schools that have helped make these schools’ brand stories stand out.

6. **Proof.** An effective brand story never attempts to “sell” a school on the basis of any area in which the school can’t legitimately outdo competitor institutions when the schools go head to head. Nothing is quite as damaging to student recruitment marketing as postured prestige. You must be able to prove your distinguishing characteristics through unique program details; persuasive statistics about resources and outcomes; and third-party endorsements and comparisons to other schools (when it’s appropriate to reveal the company you keep or show your advantage). Anecdotes can also be proof if you have enough of them to indicate the collective wisdom on your school. Some of Flint Hill’s proof points include:

- a curriculum based on best practices and innovations in pedagogy;
- a national model for responsive teaching and integrated learning center resources;
From Marketing Strategy to Brand Story

- college matriculation to selective colleges and universities such as Bowdoin, Carnegie Mellon, Columbia, Duke, Emory, Georgetown, Harvard, Haverford, Johns Hopkins, Middlebury, NYU, School of the Art Institute of Chicago, Tufts, UVA, Wellesley, and Yale;
- success in AP courses (with students consistently scoring three or higher);
- character development and honor code and culture.

7. **Personality and tone.** Is your school culture bold, proud, thrifty, intellectual, or entrepreneurial? A tried-and-true element of brand story development is to brainstorm a list of look-and-feel words that capture your school’s personality. Such a list will help guide the voice and design of school communications online, in print, and in person. Flint Hill’s list: earnest; positive; confident; can-do; driven; hardworking; creative; seeing beyond the curve; entrepreneurial; committed; Type A standards... without being Type A; questing; enterprising; generous; forward-thinking; thorough; joyous; courageous; optimistic; and visionary.

8. **Sensory details.** Once members of your audience enter your world, you must make them experience it. Whatever the medium (text, photos, film, web), the more you get out of the way and let your audiences experience the story for themselves, the better. In the best stories, action, description, and dialogue stand on their own. They have settings and scenes you can see, touch, taste, smell, and hear.

9. **Scene, dialogue, narration.** Institutional stories require scene and dialogue just as much as compelling fiction does. Note that Flint Hill’s brand story makes liberal use of quotes by parents. Think of photos as scenes, quotes as dialogue, blogs as the internal voice of a character, institutional voice as narration. How are they working together to communicate the narrative arc of your story?

10. **Strong finishes.** Endings are just as critical as beginnings. Think about the endings of books or movies you love. Good ones reverberate in your mind to project an imagined future for the characters that continues to play out even after you close a book or watch a film end. That’s just the response you want to evoke in prospective students and parents — an imagined future. In Flint Hill’s case, the parent who said, “This is the way education should be” wrapped up the story in seven powerful words.