

maas
a codesm company

The 2027 School Marketing Plan Workbook

A working enrollment marketing plan built around your admissions calendar, from first inquiry to re-enrollment. Fill in each section to set your inquiry and application targets, choose your channels and track the numbers that fill seats.

PREPARED FOR

PLAN PERIOD

QUICK START

How to use this workbook

This workbook is the working companion to our school marketing plan guide at trymaas.com/blog. Read the guide once for context, then fill in one section per week. Every box in this PDF is a form field: type straight into it in Acrobat, Preview or your browser, then save.

THE THIRTEEN SECTIONS

1. Business snapshot
2. SWOT analysis
3. Customer personas
4. Competitive analysis
5. Brand positioning
6. Goals and KPIs
7. Customer journey map
8. Channel strategy
9. Content strategy and calendar
10. Budget, stack and measurement
11. 12-month plan
12. Common mistakes
13. Quick start

> **Time budget.** Most sections take 30 to 60 minutes. Do them in order: positioning (section 5) only holds up once the snapshot, SWOT, personas and competitor work are done.

NEED HELP?

If you would rather have a team build and run this plan with you, MaaS by CodeSM is an outsourced marketing team for private and independent K-12 schools, charter schools and learning centers focused on enrollment. Book a call at **trymaas.com/get-a-demo**.

SECTION 1 · WHERE YOU ARE TODAY

Business snapshot

One page that anyone on your team, or any partner you hire, can read in two minutes.

BUSINESS NAME

LOCATIONS / SERVICE AREA

CORE SERVICES OR PRODUCTS

AVERAGE SALE OR CUSTOMER VALUE

TOP THREE CURRENT SOURCES OF CUSTOMERS

REVENUE GOAL FOR THE YEAR

CURRENT MONTHLY MARKETING BUDGET

WHO OWNS MARKETING TODAY

WHAT MAKES CUSTOMERS CHOOSE US OVER THE ALTERNATIVES?

WHAT HAS WORKED IN MARKETING SO FAR, AND WHAT HASN'T?

SECTION 2 · HONEST INTERNAL AUDIT

SWOT analysis

Strengths and weaknesses are about you. Opportunities and threats are about your market. Every weakness is a message you should not lead with; every opportunity is a campaign you haven't run yet.

STRENGTHS

Why do families choose you today? Think class size, a distinctive program (Montessori, classical, STEM, faith-based, language immersion), outcomes, teachers, community, location or schedule.

WEAKNESSES

Why do families say no or leave? Think net cost, limited aid, facilities, a dated website, slow inquiry follow-up, few reviews, or high attrition in certain grades.

OPPORTUNITIES

What is opening up? Think new ESA, voucher or scholarship programs, the federal tax credit scholarship, a growing neighborhood, district changes, and grades with open seats.

THREATS

What could cost you enrollment? Think new charters or microschools, rising tuition sensitivity, fewer young children in your area, families relocating, and competitors with stronger reviews.

TOP TAKEAWAYS

THE TWO STRENGTHS WE WILL LEAN ON HARDEST IN OUR MARKETING

THE ONE WEAKNESS TO FIX BEFORE WE SCALE SPEND

SECTION 3 · CUSTOMER PERSONAS · PERSONA 1

The Early Planner

Researching a year or more before a key entry grade.

Parents of a child entering preschool, kindergarten, grade 6 or grade 9 who visit several schools in the fall and compare philosophy, class size, outcomes and commute. They decide slowly and need steady, useful contact for months.

CHILD'S GRADE AND ENTRY YEAR

SCHOOLS ON THEIR LIST

TOP THREE PRIORITIES

QUESTIONS ABOUT COST AND AID

WHERE THEY RESEARCH

WHO INFLUENCES THE DECISION

WHAT WOULD MAKE THEM BOOK A VISIT THIS FALL INSTEAD OF NEXT SPRING?

WHAT DO THEY NEED TO HEAR BETWEEN THE OPEN HOUSE AND THE APPLICATION DEADLINE?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 2

The Switcher

Something is not working at the current school, and time matters.

A family whose child is enrolled elsewhere and struggling with academics, bullying, class size, a learning difference or a move. They inquire mid-year or in spring and summer, want a fast tour and a straight answer about openings, and decide quickly.

CHILD'S CURRENT SCHOOL AND GRADE

WHAT TRIGGERED THE SEARCH

TARGET START DATE

SUPPORT NEEDS

QUESTIONS ABOUT OPENINGS AND COST

HOW THEY FOUND YOU

HOW FAST CAN YOU GET THEM A TOUR AND A CLEAR ANSWER ABOUT SEATS?

WHO ON YOUR TEAM OWNS MID-YEAR INQUIRIES?

SECTION 3 · CUSTOMER PERSONAS · PERSONA 3

The First-Time Private School Family

Newly able to consider private school, unsure of cost and process.

A family that never considered private school, or a charter, until a choice program or scholarship made it possible. They need plain explanations of tuition, aid, applications and what a visit involves, sometimes in another language.

CHILD'S GRADE AND ENTRY YEAR

CHOICE PROGRAMS THEY MAY QUALIFY FOR

BIGGEST COST WORRY

PREFERRED LANGUAGE

WHERE THEY HEARD ABOUT YOU

STEPS IN THE PROCESS THAT CONFUSE THEM

CAN A FAMILY UNDERSTAND YOUR REAL COST IN UNDER TWO MINUTES ON YOUR WEBSITE?

WHO WILL WALK THEM THROUGH AID AND SCHOLARSHIP PAPERWORK?

SECTION 4 · KNOW THE FIELD

Competitive analysis

List the four or five businesses your customers compare you with, including the ones that aren't really competitors but win the same budget. Fill in what you can see from the outside.

BUSINESS	NET COST AFTER TYPICAL AID	GRADES SERVED AND CLASS SIZE	GOOGLE AND NICHE RATING AND REVIEW COUNT	SIGNATURE PROGRAMS	VISIT FORMAT AND DATES	INQUIRY RESPONSE TIME (MYSTERY SHOP)
Us						
Competitor 1						
Competitor 2						
Competitor 3						
Competitor 4						
Competitor 5						

WHERE WE CLEARLY WIN

WHERE WE LOSE TODAY, AND WHY

SECTION 5 · ONE SENTENCE THAT DECIDES EVERYTHING

Brand positioning

Positioning is the reason a customer should pick you. Write it before you write a single ad.

For [who you serve] who [need or problem], [your business] is the [category] that [main benefit]. Unlike [main alternative], we [proof].

WORKED EXAMPLE

> *For north Austin families who want a rigorous but warm K-8 education, Riverbend Academy is the independent school where every child is known by name, because classes are capped at 16 and every student has the same faculty advisor from kindergarten through eighth grade.*

OUR POSITIONING STATEMENT

PROOF POINT 1

PROOF POINT 2

PROOF POINT 3

SHORT VERSION FOR THE WEBSITE HEADLINE

SECTION 6 · WHAT WINNING LOOKS LIKE

Goals and KPIs

Three to five SMART goals: specific, measurable, achievable, relevant, time-bound.

#	GOAL	CURRENT	TARGET	BY WHEN / OWNER
1				
2				
3				
4				
5				

Examples. Grow completed applications for fall 2028 entry from 150 to 175 by February 15, 2028. Reply to 100% of inquiries within one business day, with a median under two hours during school hours. Lift tour-to-application conversion from 50% to 60% by the end of the 2027-28 cycle. Reduce attrition from 9% to 7% by the 2028 re-enrollment deadline.

MONTHLY KPI CHECK-IN

METRIC	WEEK 1	WEEK 2	WEEK 3	WEEK 4	GOAL
Inquiries by source and entry grade					
Median inquiry response time					
Visits booked and attended					
Visit-to-application rate					
Applications started vs completed					
New Google reviews					

SECTION 7 · FROM FIRST SEARCH TO REPEAT CUSTOMER

Customer journey map

Where your customer is, what they are doing, and where you meet them. Fill in the last column with what you will do at each stage.

STAGE	WHAT THE CUSTOMER DOES	WHERE WE MEET THEM	OUR ACTION
Trigger	An entry grade nears, a problem at the current school, a move, or a new scholarship makes private school possible.	Word of mouth, social media, community events	
Research	Searches for schools nearby, reads reviews and asks friends.	Google and Maps, Niche, school website, AI assistants	
Inquiry	Fills out a form, calls, texts or signs up for an event, and expects a quick, personal reply.	Inquiry form, phone, text, event registration	
Nurture	Has questions about cost, programs and fit, and is comparing other schools.	Email and text sequences, admissions calls	
Visit	Tours, attends an open house or sends the child for a shadow day, and decides how it feels.	Tour, open house, shadow day, follow-up note	
Application	Starts the application and may stall on forms, fees or recommendations.	Application portal, reminders, admissions help	
Assessment or lottery	Completes interviews or testing, or enters the charter lottery, and waits.	Interview day, testing, lottery notices	
Decision and aid	Weighs the offer against net cost and other schools.	Acceptance letter, aid letter, net cost conversation, revisit day	
Enrollment and summer	Signs and pays a deposit, but can still drift away before the first day.	Contract, welcome events, summer emails, new-family buddies	
Re-enrollment and advocacy	Decides whether to stay and whether to recommend you.	Year-ahead preview, re-enrollment contract, review requests, ambassador program	

SECTION 8 · WHERE THE BUDGET GOES

Channel strategy

Tick the channels you will run this year and name an owner for each. Investment ranges are planning ranges; adjust to your market.

USE	CHANNEL	ROLE	CADENCE	TYPICAL INVESTMENT	OWNER
☐	**Google Business Profile**	Map visibility, reviews and event posts	Weekly posts and photos	Free, about 1 hour per week	
☐	**Website admissions pages**	Tuition and aid, visit booking, programs and FAQs	Monthly updates; full refresh before fall	$500 to $2,000 per month	
☐	**SEO and parent-question content**	Rank for local and program searches	2 to 4 pages per month	$1,000 to $3,000 per month	
☐	**Google Ads**	Capture high-intent local searches	Always-on, heavier in fall and spring	$1,000 to $4,000 per month	
☐	**Meta ads**	Promote visits, retarget site visitors, build local awareness	Bursts around events plus always-on retargeting	$500 to $2,500 per month	
☐	**Instagram and Facebook organic**	Show daily life and build trust	3 to 5 posts per week	Staff time plus content	
☐	**Email and text nurture**	Move families from inquiry to visit to application	Triggered sequences plus a monthly email	$100 to $500 per month in tools	
☐	**Open houses, tours and shadow days**	Convert interest into applications	Monthly in season; tours weekly	$500 to $3,000 per event	
☐	**Parent ambassador program**	Word of mouth, reviews and peer calls	Ongoing, with a fall kickoff	Time plus small thank-you gifts	
☐	**School directories (Niche, GreatSchools, Private School Review)**	Third-party validation and reviews	Quarterly profile updates	Free profiles; paid tiers vary	
☐	**Community and feeder partnerships**	Preschools, churches, youth sports and relocation agents	Quarterly	Time plus sponsorships	
☐	**Direct mail**	Reach young families in your enrollment radius	1 to 2 drops before open house season	$0.50 to $1.50 per piece	

SECTION 9 · CONTENT AND SOCIAL

Content framework

Post three to five times a week on Instagram and Facebook, mostly short video, publish one or two website articles a month that answer parent questions, send a monthly email to prospective families and a weekly newsletter to current families. Always check the media release list before publishing a student's image.

EIGHT CONTENT CATEGORIES TO ROTATE

CATEGORY	FORMAT	FREQUENCY	EXAMPLE
1. A day in the life	Short video	Weekly	What 9:00 a.m. looks like in our second-grade classroom
2. Teacher spotlights	Photo carousel or short video	2 per month	Meet the teacher who has taught fifth-grade science here for 14 years
3. Student work and outcomes	Carousel or blog post	2 per month	The eighth-grade capstone projects, and where last year's graduates went next
4. Admissions explainers	Blog post plus email	Monthly in season	What happens on a shadow day, step by step
5. Tuition, aid and scholarships	Website page, video and email	Monthly in season	What families really pay here after aid, and how the new scholarship options work
6. Parent stories	Short video or quote card, shared with permission	Monthly	Why one family switched schools in the middle of third grade
7. Events and traditions	Photo carousel	Per event	Highlights from the fall harvest festival
8. Parent FAQs	30- to 60-second video	Weekly in season	Do you have openings mid-year? Our admissions director answers

OUR THREE CONTENT PILLARS THIS YEAR

SECTION 9 · CONTENT AND SOCIAL

30-day content calendar

Plan one month ahead. Write the post idea and the channel in each day you publish.

1	2	3	4	5	6
7	8	9	10	11	12
13	14	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

SECTION 10 · BUDGET ALLOCATION

Budget allocation

A starting split for a typical business in this industry. Write your own percentages and monthly dollars next to it.

TOTAL MONTHLY MARKETING BUDGET (AD SPEND + PEOPLE + TOOLS)

BUCKET	EXAMPLE	WHY	OUR %	MONTHLY $
Google Ads	25%	High-intent local searches, heavier in fall and spring		
Meta ads	20%	Visit promotion and retargeting		
Photo and video production	20%	Real classroom footage with consent		
SEO and website content	15%	Admissions, tuition and aid, and parent-question pages		
Events and ambassador program	10%	Open houses, shadow days and parent ambassador kits		
Enrollment CRM and texting tools	5%	Inquiry tracking, nurture sequences and consent records		
Contingency	5%	A late push for grades with open seats		

WHAT WE WILL CUT FIRST IF RESULTS LAG, AND WHAT WE WILL ADD FIRST IF THEY BEAT TARGET

SECTION 10 · TOOLS AND MEASUREMENT

Tech stack and weekly dashboard

STACK CHECKLIST

- [ ] One inquiry form with an instant auto-reply and a named owner
- [ ] Required How did you hear about us field and a Who referred you field
- [ ] Text-consent checkbox on every inquiry and event form
- [ ] Enrollment CRM tracking every family by stage and entry grade
- [ ] Online visit booking for tours, open houses and shadow days
- [ ] Tuition, aid and scholarship page one click from the homepage
- [ ] Google Business Profile claimed, complete and posting weekly
- [ ] Niche, GreatSchools and Private School Review profiles updated
- [ ] GA4 with inquiry, visit booking and application-start conversion events
- [ ] UTM naming convention for ads, emails and ambassador links
- [ ] Annual media release with a separate opt-in for paid advertising, plus a do-not-publish list
- [ ] Weekly enrollment dashboard shared with the head of school

WEEKLY MEASUREMENT DASHBOARD

METRIC	THIS WEEK	LAST WEEK	GOAL	STATUS
Inquiries by source and entry grade				
Median inquiry response time				
Visits booked and attended				
Visit-to-application rate				
Completed applications vs target				
Cost per visit by paid channel				
New Google reviews and average rating				
Re-enrollment contracts returned				

SECTION 11 · THE YEAR AT A GLANCE

12-month action plan

The order we suggest. Move rows to fit your season, add an owner, and tick each one off.

WHEN	FOCUS	OWNER	DONE
Month 1	Snapshot, personas, positioning and admissions calendar; fix inquiry handling and tracking		☐
Month 2	Tuition and aid page, visit booking and program pages; update Google and directory profiles		☐
Month 3	Nurture tracks for early planners and switchers; media release audit; recruit ambassador families		☐
Month 4	Fall open house campaign with Google and Meta ads; review requests begin		☐
Month 5	Visit follow-up sequences; second open house; flag at-risk current families		☐
Month 6	Application deadline push; aid and scholarship explainers; year-ahead preview for current families		☐
Month 7	Re-enrollment campaign; follow up on every unfinished application		☐
Month 8	Decisions and aid letters; revisit days and net cost conversations		☐
Month 9	Deposits and yield; switcher campaign for remaining seats		☐
Month 10	Summer welcome events and new-family buddies to prevent summer melt		☐
Month 11	New-family survey; refresh photos and video for the next cycle		☐
Month 12	Full-cycle review: inquiries to enrolled students by source, attrition, and the next year's targets		☐

SECTION 12 · WHAT TO AVOID

Common mistakes

The patterns we see most often in this industry, and the fix for each. Be honest about which ones apply to you.

01 Promoting the open house and nothing else

Plan the follow-up sequence before the event, and keep in touch until the application deadline.

- [ ] We do this today

02 Burying tuition and aid

Put net cost, aid, payment plans and choice programs one click from the homepage.

- [ ] We do this today

03 Treating every inquiry the same

Route switchers to a fast call and tour; put early planners into a monthly nurture.

- [ ] We do this today

04 Publishing student photos without a consent system

Use an annual media release with a separate opt-in for ads, and check the do-not-publish list every time.

- [ ] We do this today

05 Going quiet in summer

Run welcome events, buddy families and regular summer emails for every newly enrolled family.

- [ ] We do this today

06 Leaving re-enrollment to the business office

Give retention a marketing plan, an owner and an at-risk list every fall.

- [ ] We do this today

SECTION 13 · STARTING FROM SCRATCH

Quick start

If you only have a few hours a week, do these in order.

DONE	WHEN	TASK
☐	**Week 1**	Fill in the snapshot, personas and positioning, and write down your admissions calendar
☐	**Week 2**	Fix inquiry handling: one form, an instant reply, a named owner, a source field and text consent
☐	**Week 3**	Put tuition and aid, visit booking and program pages one click from the homepage; update Google and Niche
☐	**Week 4**	Build nurture tracks for early planners and switchers, and audit your media release process
☐	**Month 2**	Launch Google Ads and Meta ads for your next visit event; recruit ambassador families and ask for reviews
☐	**Month 3**	Build the weekly dashboard, start a re-enrollment risk list and survey new families
☐	**Quarter 2**	Publish parent-question content and a plain-language aid and scholarship guide; start two feeder partnerships
☐	**Year 1**	Review inquiries to enrolled students by source, plus attrition, and move budget to what worked

NOTES

You have the plan. Want a team to run it with you?

MaaS by CodeSM is the outsourced marketing team for private and independent K-12 schools, charter schools and learning centers focused on enrollment. One team for strategy, creative, paid media, SEO, web and reporting, without hiring a department.

01

A marketing audit

We review your listings, website, reviews, ads and reporting and show you where leads are slipping.

02

See where you stand

We compare your search visibility, reviews and ads with the competitors your customers actually consider.

03

A 90-day plan

You leave with a prioritized 90-day plan: channels, budget, content and KPIs.

04

Or we run it with you

Strategy, creative, paid media, SEO, web and reporting from one outsourced marketing team.

Book a call

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