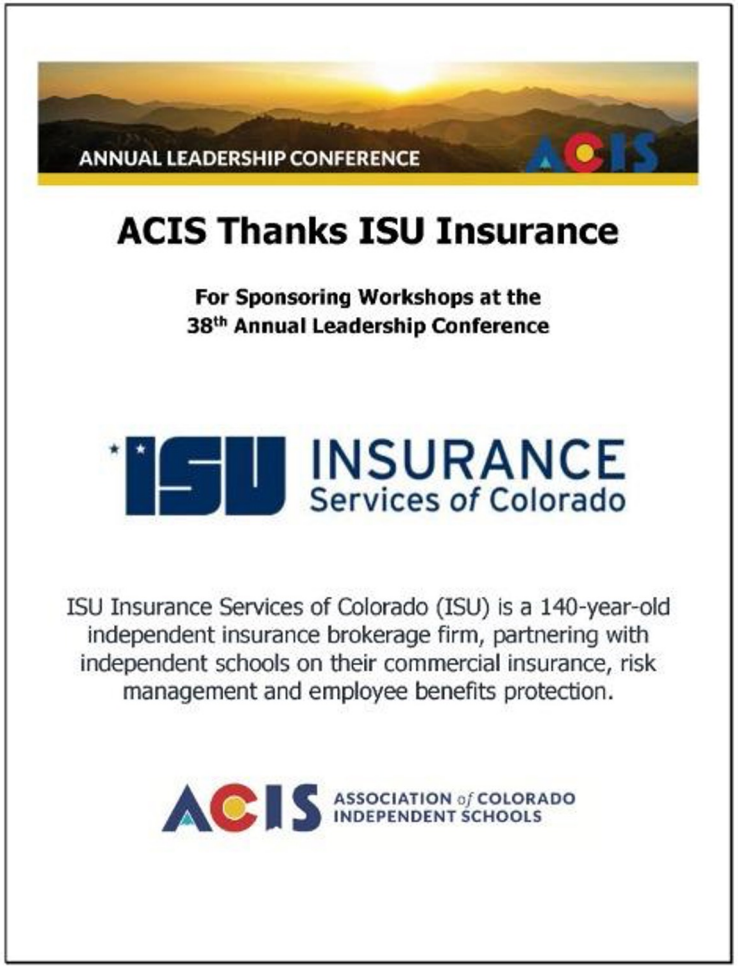


Is It the Market, the Message, or the Model?

ACIS 38th Annual Leadership Conference

October 16, 2026


ANNUAL LEADERSHIP CONFERENCE
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Agenda

- Introductions
- Why this, Why now?
- Ways Different Causes Show Up
- In Action – Market
- In Action – Messaging
- In Action – Model
- Next Steps

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STRATEGIC ENROLLMENT AND MARKETING PLANNING

STRATEGIC ENROLLMENT AND MARKETING RESEARCH

STRATEGIC ENROLLMENT AND MARKETING OPTIMIZATION

STRATEGIC ENROLLMENT AND MARKETING COACHING

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Who is here?

1

Why This?
Why Now?

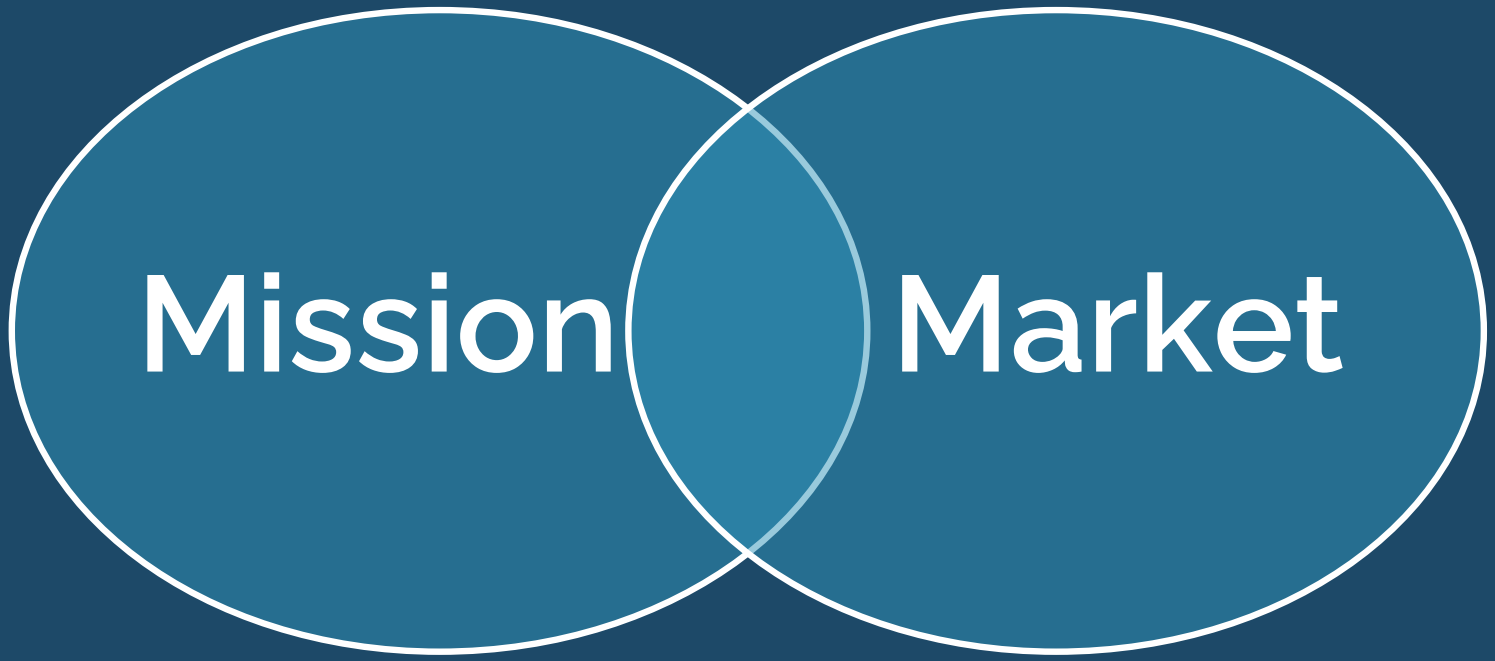
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Markets come in all shapes and sizes. To correctly position oneself in any one industry, a company must understand who needs a product and why they need it. It must understand when and where people buy certain things and how they use them.

-Communications for Research

The size and diversity of a consumer base will necessarily dictate the ways in which a company attempts to meet its demand. Thus, companies must conduct market research, asking questions so that the answers can shed light on the direction they need to go.

-Communications for Research


Mission
Market

Three lenses

Market: are there enough families?



Messaging: do they understand us?



Model: does what we offer fit what families need?




COMPETITION
PSYCHOGRAPHICS
MARKET
SURVEYS
DEMOGRAPHICS
ANECDOTE/BEHAVIOR

Demographics VS Psychographics

Age/Gender

Race

Location

Employment Status



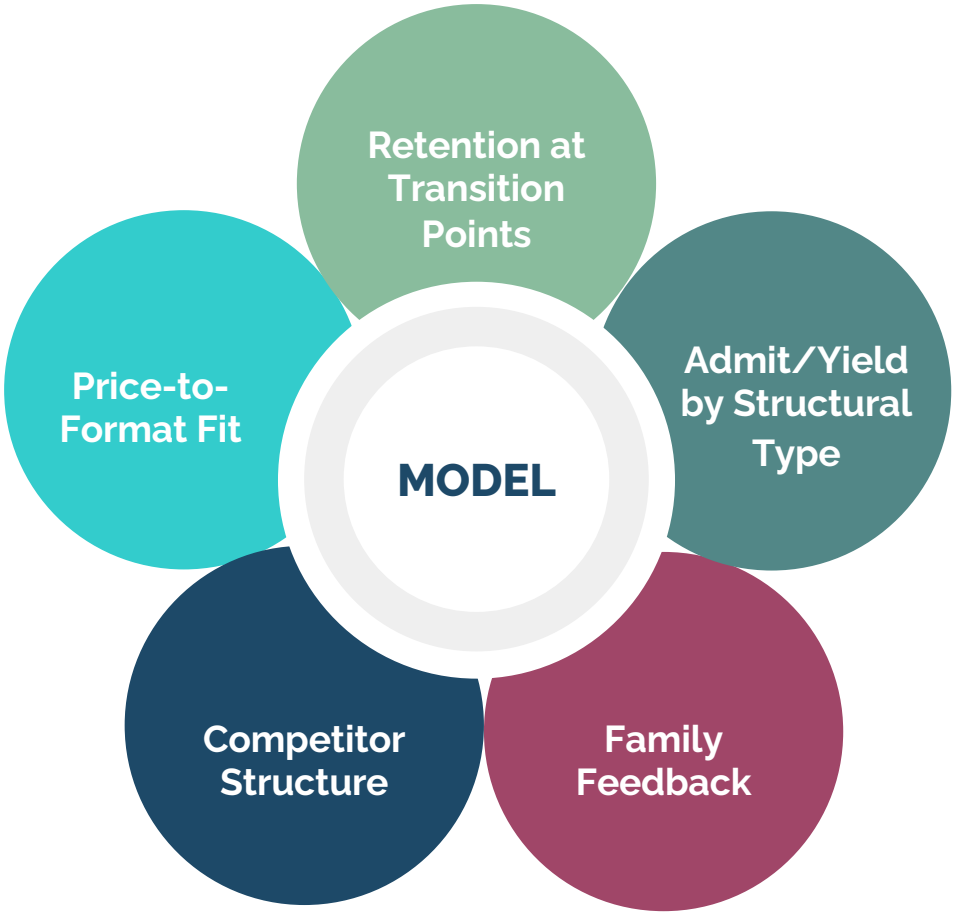
Personality

Values

Interests

Lifestyles

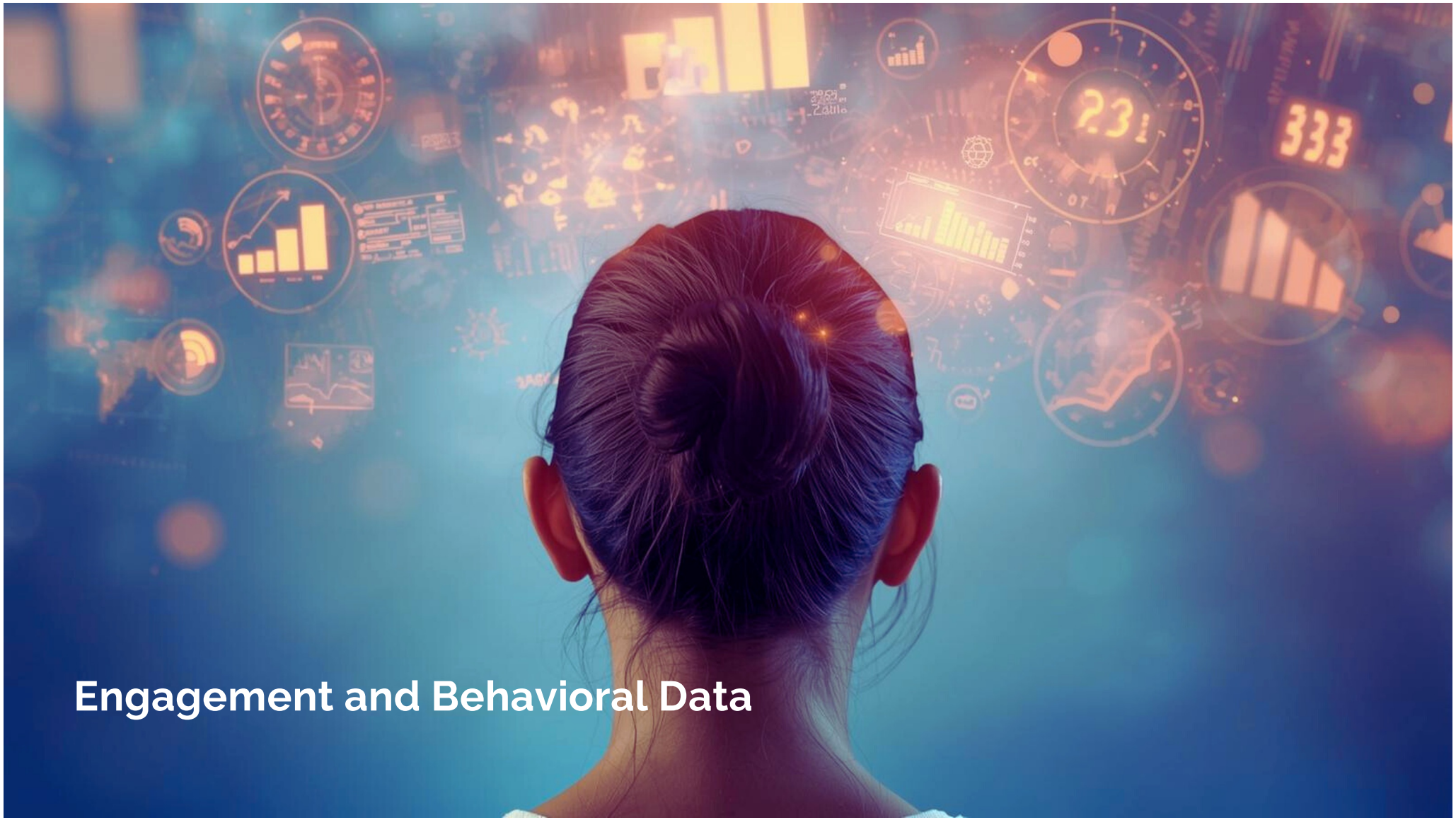

ROI
FEEDBACK
MARKETING
RETENTION PATTERNS
EXAMINE CHANGES
REVIEW MESSAGING


Retention at Transition Points
Admit/Yield by Structural Type
Family Feedback
Competitor Structure
Price-to-Format Fit
MODEL

2

Ways different causes show up

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Engagement and Behavioral Data

Indicating a market problem:

- → Booking tours but never showing up
- → Ghosting after asking about tuition

Interest is there, but the families may be too far away, unable to afford it, or not the right fit for who you serve.

Indicating a messaging problem:

- → Inquires/books a tour
- → Dropping off immediately after certain events
- → Seems engaged, but then doesn't apply, that's not a market issue: the family exists, is interested, and took action. Something along the way disengaged them.

The message (or process) might be unclear, off-putting, or misaligned with what the family values or needs at that point in the funnel.

Indicating a model problem:

- Families love the tour, ask “but what happens after 8th grade?", and don't apply
- Families need something your structure can’t offer, for example one school for all their children, a later start time, after-care, or a specific format.
- Exit interviews mention the structural feature itself (grade span, single-gender) more than any program

Families praise the program, then choose a school built with a different structure.



Yield Indicators: Where Did the Families Who Said No Go?



Market problem

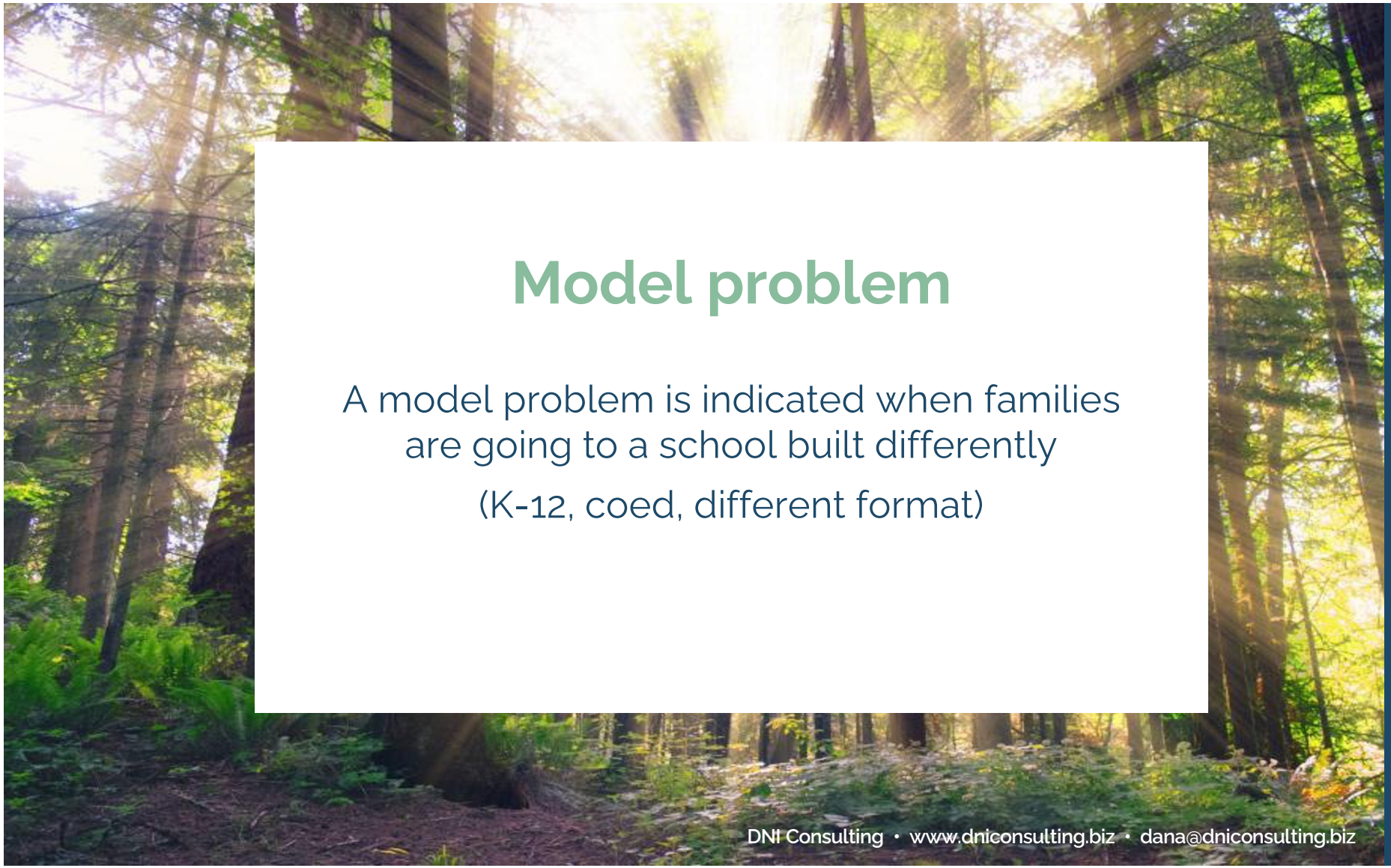
A market problem might be indicated if families choose a school with more aid than you can offer



Messaging problem

A messaging problem may reveal itself when families go to a school like yours

(same grades, same format, similar price)



Model problem

A model problem is indicated when families are going to a school built differently

(K-12, coed, different format)

Sometimes
surveys point to a
market problem

Other times results point to a
messaging problem

And other times indicate a
model problem



Indicating a market problem:

- "It's too far away."
- "We moved out of the area."
- "Our son wanted to play baseball." (you don't offer baseball)

May be a mismatch between your offering and the families in your geographic reach.

Indicating a messaging problem:

- → "We didn't understand what made you different."
- → "The process felt unclear or rushed."
- → "We almost didn't apply, but now we love it here."
- → "This school is the best kept secret."

Indicates that good-fit families are available, but your message or experience isn't resonating.

Indicating a model problem:

- "We love it here. We just needed a coed environment since we also have a girl".
- "If you went through 12th grade, we wouldn't have even looked elsewhere."
- "We wanted a more traditional/faith-based/ local option."
- "We chose a day school instead of boarding."

Indicates there is something about the structure that is not working.



Affordability: When Families Say “It’s too expensive”

Indicating a Market problem

Families in your draw area genuinely can't afford full tuition at scale, and no realistic aid budget closes that gap

Indicating a Messaging problem

Families can afford it but don't perceive the value as matching the price. This is a willingness-to-pay gap, not a capacity gap

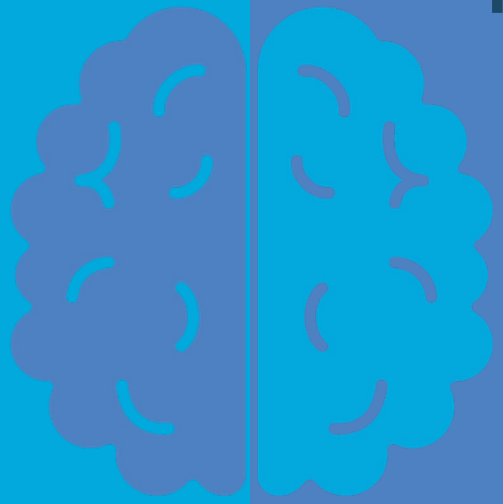
Test: did the family choose a school that costs the same or more? If so, it wasn't about the money.

Indicating a Model problem

Your price is built on a format (small classes, boarding, facilities) that families no longer pay for, when a lower-cost school nearby delivers comparable outcomes

Demographic Data:

The "How Many" Layer



Psychographic Data:

The "Why" Layer

Competition: Key Questions

Who are our main competitors?

What are their differentiators?

What is happening on a MACRO level?

What are trends in public/private/ homeschool?

What are our differentiators?

A competitor scan can reveal a market problem, a messaging problem, or a model problem



When There May Be a Market Problem

Market saturation: High number of similar options, demographics are not in your favor, you may be in an oversupplied market.

For example: You're one of 4 options in a 30 min drive time that promises "academic rigor" and to know the whole child. One competitor stands out for their athletic program. Otherwise, not much is different between the schools until you really feel it and/or dig into course offerings.

When There May Be a Messaging Problem

- **Messaging misalignment:** If competitors with similar offerings are doing better, maybe they are doing a better job of telling their story.
- **Visibility gaps:** If families are choosing other schools simply because they know more about them, it suggests a need for improved outreach.

For example: Other schools aren't offering anything drastically different, but they're perceived as more 'academic' or 'welcoming' - this may indicate a messaging issue.

When There May Be a Model Problem

- The schools families compare you to are built differently from you: grades served, genders served, a different schedule or format.
- What competitors offer is what families in your area say they want, and you can't offer it without changing the structure.

For example: most schools within 30 minutes are K-12 and coed. You are K-8 and all girls.

3

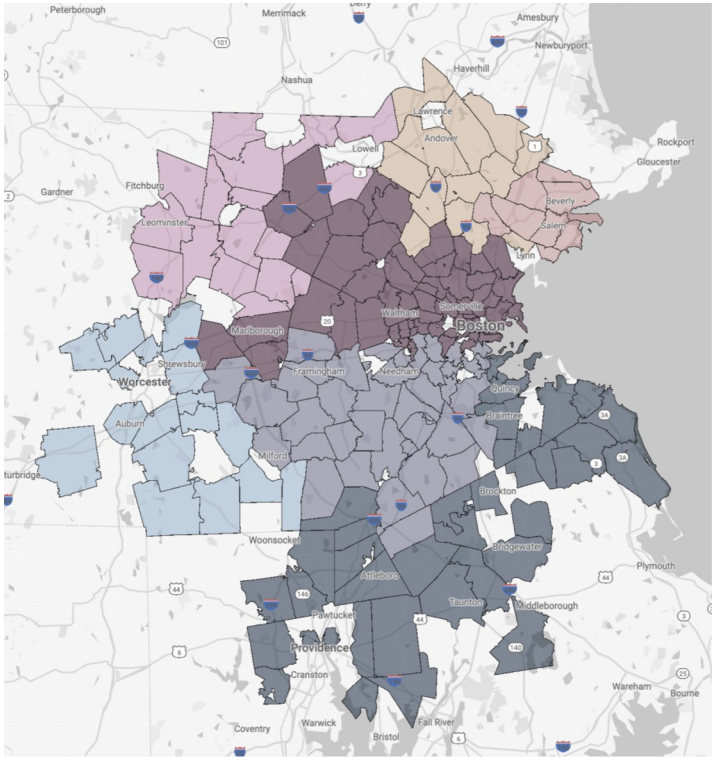
In Action
Market

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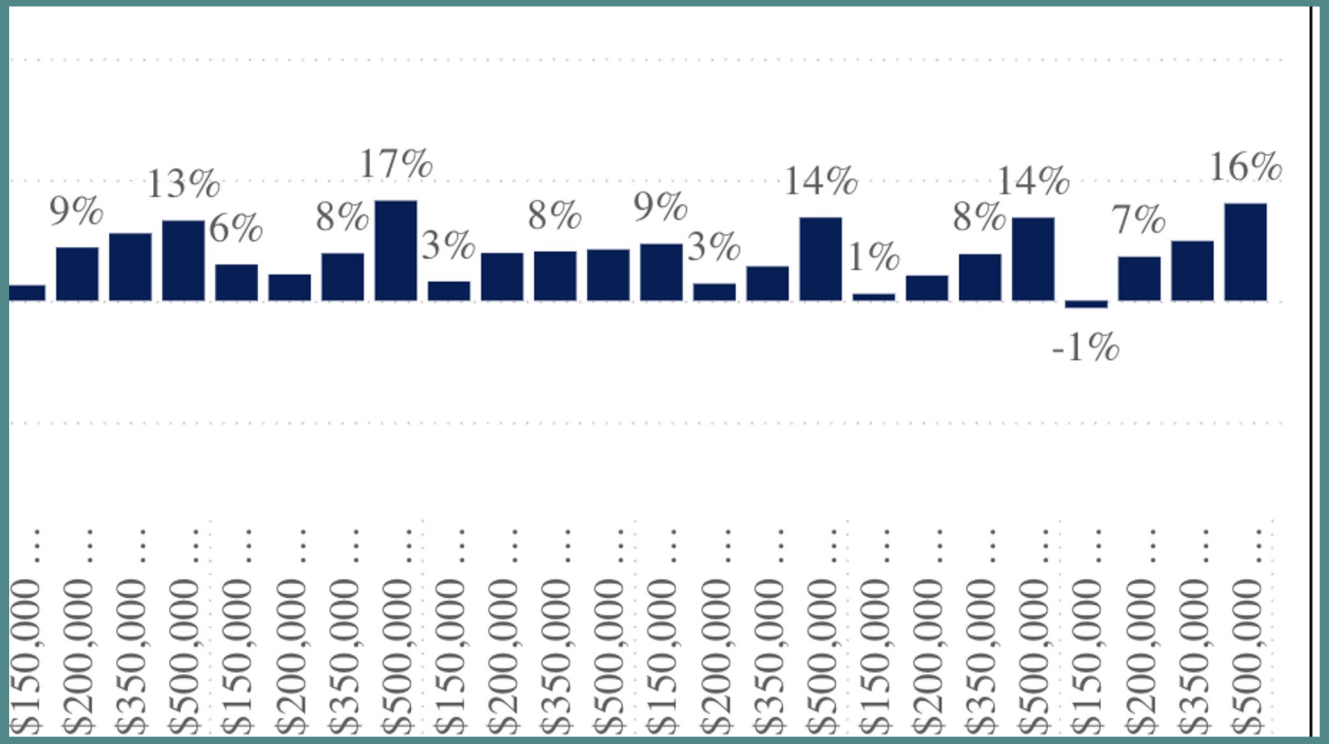
Steps to Evaluating the Market

- Determine where you want to study
- Pull demographic data. Consider what factors are most important to you.
- Pull psychographic data (family and area)
- Analyze what you've got
- Prioritize
- Messaging strategy

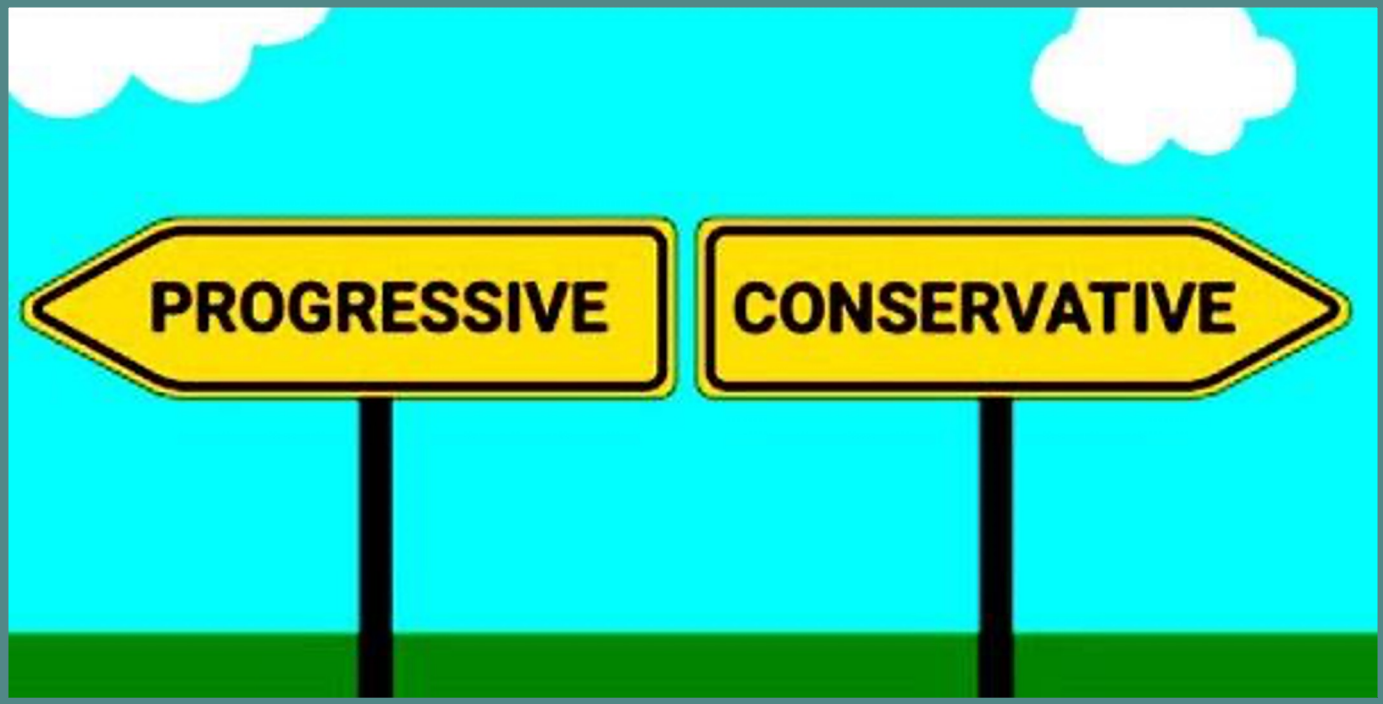
Step 1: Determine Areas to Study



Step 2: Demo Data Snapshot and Analysis



Step 3: Psycho Data Area Snapshot



Step 3B: Pulled Family Psycho Data

Henley	Birminghar	MI	48009	770 HENLE	BIRMINGH	MI	48009	48009	480095683	03	6	Movers & S
6 Greer	Bloomfield	MI	48304	1026 GREI	BLOOMFIE	MI	48304	48304	483042534	03	6	Movers & S
0 Brook	Bloomfield	MI	48304	5050 BRO(	BLOOMFIE	MI	48304	48304	483043610	02	6	Networked
5 Hartla	Troy	MI	48083	1615 HART	TROY	MI	48083	48083	480835456	10	6	Executive S
3 Ambe	Troy	MI	48084	2813 AMBI	TROY	MI	48084	48084	480842689	12	6	Cruisin' to I
Monter	Rochester	MI	48307	990 MONT	ROCHEST	MI	48307	48307	483074940	14	6	Kids & Cul-
E Squa	Bloomfield	MI	48304	998 E SQU	BLOOMFIE	MI	48304	48304	483041955	03	6	Movers & S
9 Melco	Troy	MI	48084	2659 MELC	TROY	MI	48084	48084	480843460	13	6	Upward Bo
1 Lakec	Bloomfield	MI	48304	3701 LAKE	BLOOMFIE	MI	48304	48304	483043038	01	4	Upper Crus
5 Comp	Bloomfield	MI	48302	4275 COM	BLOOMFIE	MI	48302	48302	483022007	03	6	Movers & S
4 Hanle	Birminghar	MI	48009	1664 HANL	BIRMINGH	MI	48009	48009	480097269	06	6	Winner's C
5 E Silv	Lake Orion	MI	48360	1275 E SIL	LAKE ORI(	MI	48360	48360	483602338	05	6	Country Sq
85 Can	Franklin	MI	48025	25085 CAN	FRANKLIN	MI	48025	48025	480251209	03	6	Movers & S
9 Snow	Rochester	MI	48307	1699 SNO\	ROCHEST	MI	48307	48307	483076003	02	6	Networked
8 Echo	Bloomfield	MI	48302	5068 ECH(	BLOOMFIE	MI	48302	48302	483022706	02	6	Networked
E Ferry	Detroit	MI	48202	305 E FER	DETROIT	MI	48202	48202	482023860	43	6	City Roots
5 Fairfa	Birminghar	MI	48009	1045 FAIRI	BIRMINGH	MI	48009	48009	480091286	03	6	Movers & S
1 Wave	Detroit	MI	48238	4311 WAVE	DETROIT	MI	48238	48238	482383283	45	6	Urban Mod

Step 4: Analyze What's There

Upper Crust

Kids & Cul-de-Sacs

American Dreams

Segment Name	SCHOOL AGGREGATE COUNT	School Percentage %Comp	Aggregate Count	%Comp
Totals	356	100%	246,632	100%
01 Upper Crust	8	2.25%	8,064	3.27%
02 Networked Neighbors	119	33.43%	5,453	2.21%
03 Movers & Shakers	36	10.11%	10,851	4.40%
04 Young Digerati	8	2.25%	4,275	1.73%
05 Country Squires	8	2.25%	1,271	0.52%
06 Winner's Circle	51	14.33%	10,356	4.20%
07 Money & Brains	0	0.00%	2,549	1.03%
08 Gray Power	9	2.53%	17,535	7.11%
09 Big Fish, Small Pond	2	0.56%	329	0.13%
10 Executive Suites	9	2.53%	12,579	5.10%
11 Fast-Track Families	1	0.28%	0	0.00%
12 Cruisin' to Retirement	5	1.40%	17,150	6.95%
13 Upward Bound	10	2.81%	5,171	2.10%
14 Kids & Cul-de-Sacs	3	0.84%	3,799	1.54%
15 New Homesteaders	2	0.56%	419	0.17%
16 Beltway Boomers	3	0.84%	3,212	1.30%
17 Urban Elders	0	0.00%	674	0.27%
18 Mayberry-ville	0	0.00%	0	0.00%
19 American Dreams	3	0.84%	8,045	3.26%
20 Empty Nests	4	1.12%	10,346	4.19%
21 The Cosmopolitans	4	1.12%	8,785	3.56%
22 Middleburg Managers	37	10.39%	23,148	9.39%

Step 5: Prioritize

Area	Miscel	Current Enrollment	Population of Level 1 Segments	Population of Level 2 Segments	Opportunity in Level 1 Segments	Opportunity in Level 2 Segments	# of Children Age 14 to 17	Growth of Children Age 10 to 17	# of Families with Children 10 to 17 Earning > $200k	Growth of Families with Children 10 to 17 Earning > $200k	# of Families with Children 10 to 17 Earning > $350k	Growth of Families with Children 10 to 17 Earning > $350k
Area 1:	10	186	5,672	1,863	-36.0%	12.6%	16,176	1.0%	4891	19.4%	2281	22.6%
Area 2:	9	21	1,765	1,397	-36.0%	14.8%	22,439	1.0%	4618	28.2%	1,946	29.1%
Area 3:	8	12	8,394	7,515	-50.6%	21.0%	12,996	0.8%	2936	28.7%	1,300	30.9%
Area 4:	8	37	11,220	8,961	-41.9%	16.1%	18,125	1.7%	3595	33.7%	1,496	33.9%
Area 5:	7	10	1,608	5,524	-6.6%	1.6%	15,184	1.3%	1761	49.6%	753	51.2%
Area 6:	6	3	8,040	10,568	-40.5%	1.1%	19,690	-0.2%	2603	43.7%	1,089	44.0%
Area 7:	6	1	7,901	8,705	24.0%	26.4%	13,863	0.8%	1939	40.5%	801	41.3%
Area 8:	6	2	753	1,676	-36.4%	30.3%	1,791	1.2%	192	53.6%	81	55.8%

Area	Miscel	Current Enrollment	Population of Level 1 Segments	Population of Level 2 Segments	Opportunity in Level 1 Segments	Opportunity in Level 2 Segments	# of Children Age 0 to 17	Growth of Children Age 0 to 17	# of Families with Children 0 to 17 Earning > $200k	Growth of Families with Children 0 to 17 Earning > $200k	# of Families with Children 0 to 17 Earning > $350k	Growth of Families with Children 0 to 17 Earning > $350k	TOTAL Children 0 to 17 Earning > $200k	TOTAL Children 0 to 17 Earning > $350k
	15%	15%	10%	10%	10%	10%	10%	5%	10%	5%	10%	5%	100%	100%
Area 1:	1.00	1.00	0.51	0.18	0.20	0.74	0.70	0.60	1.00	0.05	1.00	0.10	66%	67%
Area 2:	0.86	0.11	0.16	0.13	0.20	0.77	1.00	0.61	0.94	0.20	0.85	0.22	51%	50%
Area 3:	0.71	0.06	0.75	0.71	-	0.86	0.54	0.53	0.58	0.21	0.55	0.25	50%	50%
Area 4:	0.71	0.20	1.00	0.85	0.12	0.79	0.79	0.89	0.72	0.30	0.64	0.30	62%	62%
Area 5:	0.57	0.05	0.14	0.52	0.59	0.58	0.65	0.72	0.33	0.58	0.31	0.60	44%	44%
Area 6:	0.43	0.02	0.72	1.00	0.14	0.57	0.87	0.15	0.51	0.47	0.46	0.48	48%	47%
Area 7:	0.43	0.01	0.70	0.82	1.00	0.94	0.58	0.52	0.37	0.42	0.33	0.43	55%	55%
Area 8:	0.43	0.01	0.07	0.16	0.19	1.00	-	0.70	-	0.65	-	0.68	27%	28%

Step 6: Created Messaging Strategy

Purpose-Driven Creators	This persona reflects affluent, intellectually curious families who value progressive education, artistic expression, and environmental consciousness. They seek schools that balance rigor with purpose and creativity with community. Messaging that centers on ethical leadership, student voice, and global stewardship will resonate strongly.	Emphasize student-led inquiry and interdisciplinary, project-based learning that encourages independent thinking and real-world problem solving. Highlight the school's commitment to environmental leadership through marine science, sustainability initiatives, and nature-based learning experiences.	Interactive events featuring student projects in robotics, app development, or digital media production. Host art exhibitions, musical performances, or theater productions that showcase student creativity. Host workshops or talks on college admissions, innovation in education, or global citizenship. Organize activities like international food festivals, sustainability fairs, or outdoor learning showcases.	Highly targeted campaigns on Instagram, LinkedIn, and Facebook to reach tech-savvy families and professionals. Sponsor or create podcasts focusing on parenting, education trends, or global citizenship. Publish blog posts or videos on topics like STEM programs, the arts, or sustainability in education. Advertise in luxury lifestyle magazines and local community publications.

Action Planning

→ Eliminated travel to two areas

→ Re-consider strategy in different areas:

In Area 1, they emphasized structure, tradition, and college results.

In Area 2, they led with student-centered learning, community, and character development.

Results

- → Applications from Area 1 increased 22% the next year.
- → Yield went up 7% from Area 2.
- → Relationships with feeder schools in these two markets on more solid ground.

Questions to discuss:

- → Where do your families actually come from, and does that match where you want to recruit?
- → Do you know what your current families have in common beyond where they live: what they value, not just their income?
- → Which area or group of families are you spending the most effort on, and is it the one most likely to enroll?
- → What would change if you stopped recruiting in one area, and put that time somewhere else?

4

In Action
Messaging

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ROI
FEEDBACK
MARKETING
RETENTION PATTERNS
EXAMINE CHANGES
REVIEW MESSAGING

Evaluate ROI:

- → Where are your inquiries *actually* coming from?
- → What is the cost per inquiry by channel? *(e.g., Google Ads, mailings, feeder schools)*
- → Are your highest-yield activities getting enough investment?

Example: $10,000 on a brochure mailed to 2,000 homes brought 2 inquiries. $2,000 in targeted digital ads brought 30.

Review Messaging:

- → Does your messaging reflect what your market values?
- → Are families hearing the same message across channels (social, website, admissions)?

Example: a school trying to attract academic families had a website about community and belonging, with almost nothing on outcomes or rigor.

Look at Retention Patterns:

- Who is leaving, and when?
- Are there patterns by grade level, household type, or recruitment area?

Example: families left after 10th grade, surprised by the rigor. Earlier materials had talked about community and well-being.

Examine What Has Changed:

- → Have demographics or psychographics changed in your feeder regions?
- → Is your messaging still aligned with your current family base or is it stuck in the past?

Example: 'legacy and prestige' stopped landing. Families now cared about safety, flexibility, and wellness.

Consider Feedback:

- What were the deciding factors for families who enrolled, declined, or left?
- Do families feel that your messaging accurately reflects their experience?

Example: declined families loved the campus visit but found the follow-up emails too transactional.

Action Planning

- Reviewed the need for “glossy brochure” – moved resources to short form videos that got higher ROI.
- Changed messaging from “legacy” to “wellbeing.”
- Designed messaging strategy for 6-8th to ensure families understood the rigor of the high school program.

Results

- Video viewing stayed stable, increased enthusiasm for new vehicles
- Inquiries up by 9%, apps up by 7%, overall enrollment of new students up by 5%
- Retention in the high school went up by 6%

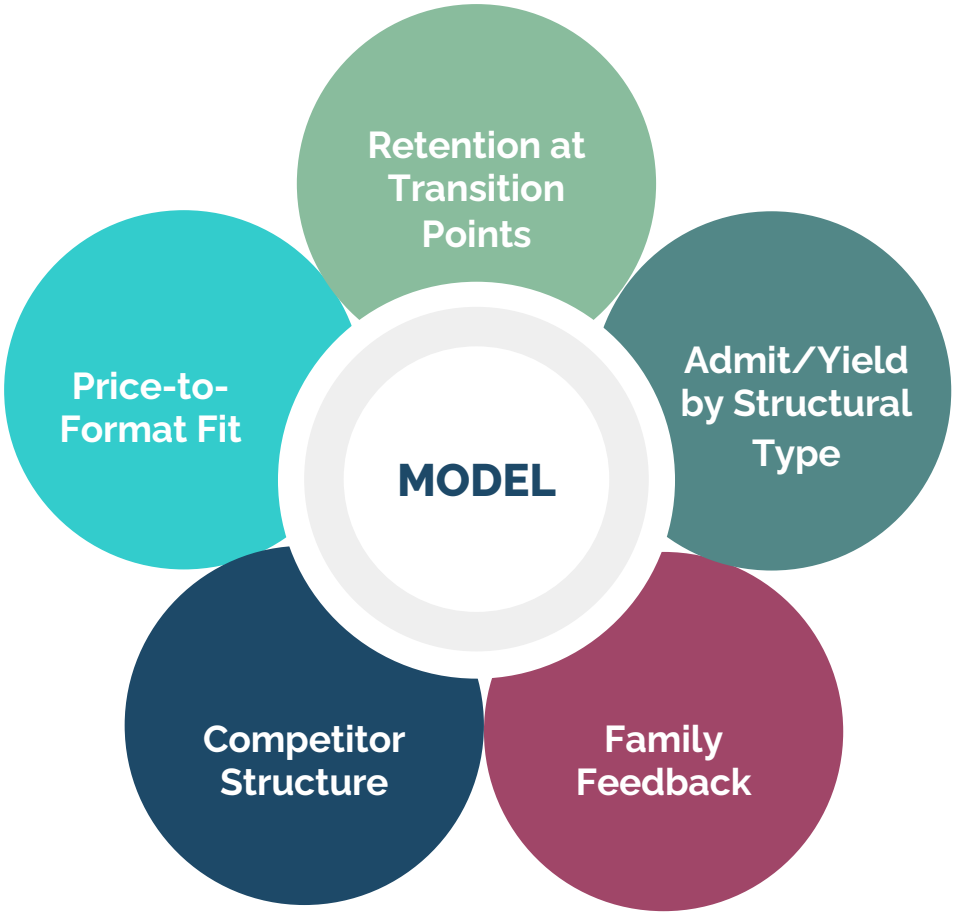
Questions to discuss:

- → What is one thing your school says about itself that may not actually be landing with families?
- → Where do good-fit families seem to fall out of the funnel?
- → What marketing activity or investment may no longer be earning its keep?
- → Where might your school's message and the actual family experience be out of sync?
- → What feedback have you received that points to a messaging problem, not a market problem?

5

In Action Model

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Retention at Transition Points
Admit/Yield by Structural Type
Family Feedback
Competitor Structure
Price-to-Format Fit
MODEL

Admit/Yield by Structural Type

- Among admitted families who decline, how many chose a school with a different grade span, gender model, or format versus a school that's structurally similar to yours?
- Is yield softer specifically among families transitioning out at your final grade, compared to earlier grades?

→ **Example**: a K-8 girls' school in a big city. Most families who decline choose K-12 coed schools.

Family Feedback on the Offer Itself

- When families decline or leave, do they name the structure directly (grade span, format, gender model) rather than culture, cost, or distance?
- Are current families raising the same theme unprompted, not just in exit interviews?

→ **Example:** families decline a K-8 girls' school because it ends at 8th grade, even though they love the program.

Competitor Structural Comparison

- Has your competitive set shifted toward a different structure (more K–12 options, more single-gender options) while your model has stayed fixed?
- Are you losing families specifically to the schools that differ from you structurally, not to the ones that are similar?

→ **Example**: the competitors are all K-12 and coed. Families didn't criticize the program, just the structure.

Price-to-Format Fit

- Does your tuition still match what the format itself delivers, or are you pricing for a structure (small classes, dedicated facilities, a specific format) families no longer pay a premium for?

- Is there a lower-cost option nearby with comparable outcomes and a different format?

→ **Example**: a K-8 girls' school charges about the same as nearby K-12 coed schools. Families ask what the single-gender, K-8 format gives them for that price.

Retention at Transition Points

- Does attrition cluster at a specific grade — right where your structure ends and a competitor's continues?
- Is that pattern distinct from general attrition spread evenly across grades?

→ **Example**: a K-8 girls' school loses more students in the middle grades than in earlier ones, as families move to K-12 schools ahead of high school.

Action Planning

- → Looked like a Model problem: a K-8 girls' school surrounded by K-12 coed schools, losing students to them
- → Decided not to change the model
- → Instead, prove the K-8 benefits, great high school placement, and the benefits of all girls
- → In process

Questions to discuss:

- → Have you ever mistaken a **Model signal** for one that actually needed a **Messaging fix**?
- → What told you the model itself didn't need to change?
- → Where in your own school might a structural complaint actually be a story you haven't told yet?

6

Next Steps

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- → Before your next enrollment decision, ask: is this a market, message, or model question?
- → Have we looked at our own local data, or are we still repeating the national story?
- → Where exactly in the funnel (inquiry, application, yield, retention) is the softness — because each points somewhere different?

What to do once you have some info:

Market

- Consider priorities for the coming year or two. Put a stake in the ground!
- Consider signature programming, right sizing, and/or sticking it out (armed and prepared!)

Message

- Use the data to facilitate a gentle meeting with the right person/people to discuss what you have learned.
- Partner with the right folks to strategize on improvements.

Model

- Rule out the story first. Do families name the same structural reason again and again?
- Then decide on purpose: change the structure, or keep it and prove it.

Key Resources

- Claritas Nielsen/Experian
- NAIS/EASI
- NAIS/Market Share
- Real Estate reports
- Employment reports
- Department of Education
- County Data
- ESRI
- Census
- Local sources


TAKE
ACTION

Enrollment challenges are rarely just about one thing, but data helps clarify where the real gap is:

Reach, resonance, or structure



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Keep in Touch!

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If you are reviewing these slides after the event, please send an email.