



# An Education Buying Cycle Guide for B2E Marketers

How to Optimize Your Efforts At Every Phase

# The Unique Nature of the Education Buying Cycle



You can't simply transpose buying cycle knowledge from other industries into the education market. The K-12 education buying cycle has specific variables and challenges that every education marketer must know before designing an integrated campaign strategy.

For one, the education industry has a longer buying cycle than most. Lead acquisition starts in fall and must be “warmed” through winter until spring, when purchase decisions are made. Since nearly all public school funding comes from federal, state, and local governments, once a school district’s budget is announced, it’s fairly rigid, especially for big ticket purchases.

Another wrinkle in the education buying cycle is the influx of pandemic-era funding like ESSER, which has led to a deluge of new education products and services. There are more education and edtech companies in the space, more pitches in education leaders’ inboxes, and more booths at education conferences. That means it’s that much harder to get attention for your particular product or service.

But every challenge comes with an opportunity. You can gain a competitive advantage by tailoring your marketing and PR efforts to align with the phases of the education buying cycle as well as your personas to maximize results.

Here’s how to create a formidable strategy to turn your leads into prospects and your prospects into customers.

# Aligning your marketing efforts with the phases of the school year

Most successful companies in the education sector set up their sales and marketing processes to acquire as many leads as they can in fall. They nurture those leads throughout winter in hopes that by the time the budget arrives in spring, they will have acquired a large pool of prospects with wallet in hand.

Here are the strategic activities and essential materials you need in each phase of the education buying cycle.

## Lead generation (Aug-Dec)

The start of the school year is an ideal time for acquiring leads and fine-tuning your positioning and messaging. The problem is, every savvy education company is on the same pitch calendar.

It's imperative that you stand out among the thousands of education companies all vying for the same prospect (and using the same email vendors to do so). Your audience—from administrators to instructors—will be inundated with pitches starting on day one, but there are marketing strategies to keep your product from being overlooked.

Primarily, you need to understand your differentiators and have a unique value proposition. You also need to understand your personas, their pain points, and their motivations.

### Know your audience

In education marketing, you have layers of personas to appeal to in order to successfully market your product or service. Your target personas might include some or all of the following:

- Superintendents
- Principals
- Curriculum directors
- Administrators
- Instructors
- Students
- Parents or caregivers

Not all of these personas have purchasing power, but appealing to personas like students and teachers can build your product's credibility among decision makers.

## Optimize your marketing channels

To create messaging that actually resonates with your audience, be thoughtful about your strategies within your marketing channels. The PESO model (paid, earned, shared, and owned media) comprises an integrated marketing campaign to acquire and nurture leads to purchase. You need all four channels to market effectively, but certain media will prove more valuable than others at different times of the school year. Here's how to make the most of your channels in the fall.

### Paid media

Aug-Dec

Paid media is one of the most effective lead generation tools you have. Options include gated sponsored articles in education trade publications or chaperoned emails with gated content that are deployed through trusted third parties like education associations and education trade publications.

### Earned media

Aug-Dec

This includes any media coverage about your product resulting from a successful pitch or news release distribution. Relationships with publications is critical here — you need connections to journalists and education influencers to garner media mentions about internal subject-matter experts and/or customers that generate awareness of your company. Appropriate news release topics might include new customers, product updates, and proprietary data such as annual trends reports. You can also highlight customer stories through targeted media outreach to both national education trade media outlets and local consumer media outlets.

### Shared media

Aug-Dec

You can collect contact information about a prospect through paid social media ads. Just be aware that different channels will resonate with different personas. Administrators, principals, and decision-makers are more likely to use LinkedIn than Facebook or X (formerly Twitter). That's because it's a professional network and allows them to promote their personal brand and career accomplishments. Instructors, on the other hand, tend to exchange ideas and network on X and Facebook. They may also seek inspiration from Instagram education influencers.

### Owned media

Aug-Dec

Cornerstone content assets are foundational materials that fuel your other channels throughout the school buying cycle. With cornerstone assets, you can break up and reframe the components into different content types and leverage them across your marketing channels and campaigns. For instance, the beginning of the school year is an ideal moment to promote a third-party efficacy study as prospects begin seeing new problems that need to be solved in real time. That efficacy study can be broken up into smaller content pieces such as an infographic or blog post.

### **Focus on messaging around your product's efficacy**

You know the competition for education companies is stiff. Especially as ESSER comes to a close, it isn't enough to market a product based on anecdotes. Education decision makers also want to see that it helps students achieve better outcomes. One of the best ways to set your company apart at the start of the buying cycle is to highlight your product's efficacy throughout your marketing channels. If you haven't already, take a look at each target school districts' strategic plan to align your education product or service with its objectives (e.g., attendance rates, literacy rates, graduation rates, etc.).

Third-party efficacy studies can be incredibly persuasive to education leaders as well. Even better, they're owned media that can serve as a cornerstone asset with many opportunities for repurposing.

### **Lead nurturing (Jan-May)**

One of your biggest challenges will be keeping your leads warm throughout the winter.

Continuing to market to your prospects in the winter months can secure a large pool of sales-qualified leads (SQLs) for your team to close. January–May also presents a unique opportunity to connect with your leads during spring's conference season.

### **Make the most of conference season**

You have an ideal opportunity during the late-winter and spring months to nurture and re-engage leads in person.

In fact, it's essential.

Attending education conferences and trade shows allows you to put names to faces, build awareness, and generate new leads. It's also a prime time for media coverage and sponsorship opportunities.

The biggest trade shows in K-12 education include:

- FETC (Future of Education Technology Conference)
- TCEA
- ISTE (International Society for Technology in Education)

You don't necessarily need to sponsor a trade show or host a panel discussion at a conference in order to secure leads — but if you do, follow [these tips for driving booth traffic](#). You can market any number of ways during conferences, from scheduling media meetings to visiting other education leaders' booths with marketing materials. Even having your branding on conference lanyards helps you stay top of mind for prospects.

Education sales expert, Matt Gambino, [recently shared his easy-to-implement C-A-S-H approach](#) to engaging prospects at education conferences more effectively—an excellent asset to share with your sales team.

### **Create genuine relationships**

Remember in the intro when we promised “one essential variable to education marketing success that many education marketers overlook”? This is it.

## **In the education industry, warming leads requires a little more creativity — and personal connection**

The conference season also underscores a critical element to the success of your marketing: forming genuine relationships. It's one thing to re-engage a lead in an [email nurture campaign](#) reminding them to read your latest efficacy report. But in the education industry, warming leads requires a little more creativity — and personal connection.

Instead of re-engaging a prospect with a reminder to click on a link, you can reach out to see if they plan to attend the same conference as you and schedule a time to connect. Or you may ask how they're managing the latest education-related legislation and offer some assistance. Think about ways you can provide empathy and support that feels authentic and personalized to your prospect.

### **Optimize your marketing channels**

While many of your efforts from the early buying cycle stages will continue into winter and spring, you should make a few key adjustments to your media channels.

## Paid media

Jan – May

Mid-stage is a prime time to leverage the wealth of ungated paid media options. For example, consider sponsoring a roundtable with your target audience, tap into education influencers on social media platforms like TikTok, or become a sponsored podcast guest—a surprisingly affordable and effective tactic.

## Earned media

Jan – May

Continue sending out regular news releases to targeted media, and tell stories of your customers through focused media pitching. Thought leadership through awards and speaking opportunities also helps nurture leads by building credibility and authority that minimizes their pre-purchase concern.

As previously mentioned, conferences and trade shows provide major marketing opportunities as well. To enhance your earned media strategy, schedule media meetings with reporters, journalists, editors, or education spokespeople during conference periods. You'll build relationships with these writers, and you may be included in their round-ups or articles about company and product updates from the conference.

Certain podcasts will record episodes at conferences as well. If you have connections with education podcast hosts or writers, lean on those relationships to create opportunities to appear as a guest on their shows, or at least meet them in person.

## Shared media

Jan – May

Share earned media coverage and owned content on organic and paid social media. And if you plan to attend any conferences, stay active on your social media channels. Post your booth location, share a link to your panel discussion, or swap social media info with your leads. Or, preferably go a step further and highlight an interlock between your solution and another session or event at the show.

## Owned media

Jan – May

Develop sales enablement materials that support the sales team as they receive SQLs. Examples include comparison guides, checklists, email templates, scripts and FAQs. Sales should also re-engage lapsed leads from the previous sales cycle (remember last year?), sending them fresh materials, or even creating an email re-engagement campaign specifically for this segment. Those folks found you intriguing enough twelve months ago, and their reason for eventually saying no may have disappeared.

## Purchase Decision (June-July... and beyond)

At this stage, your marketing should focus on sales enablement. While promoting your product or service's efficacy is important throughout the year, evidence that others have had success with your solutions will prove especially powerful during this phase. Luckily, at this point of the school year, you may have fresh success stories to share. Provide your prospect with materials anticipating any late-stage objections or barriers to assure them they can purchase confidently.

### Optimize your marketing channels

Here's how to maximize the value of your channels to support the final phase.

#### Paid media

June - July

Trade shows are still in play at this stage of the buying cycle. Continue working these marketing and PR opportunities with sponsorships at events your target audience is attending. If you have a regional or state-level strategy, you'll find success at smaller events in those locations, often at a lower investment.

#### Shared media

June - July

Continue sharing earned media coverage and owned content on social media, and emphasize posts highlighting customer success stories. Peer endorsement is priceless in the education market.

#### Earned media

June - July

Leverage the large press corp that is present at education trade shows by conducting media meetings at the event. It's also beneficial to have news moments reflected in news releases that tie to these events. Product announcements are especially relevant at this point, as education trade outlets are looking to share product launches with their readers, often in product roundup articles.

#### Owned media

June - July

A well-crafted case study or testimonial detailing how your product generated better outcomes for students, families, and stakeholders is sometimes all you need to tip the scales. These materials instill confidence in prospective partners.

You can also develop an Account-Based Marketing (ABM) plan. In these marketing plans, you dedicate a certain amount of resources to target your highest-potential prospects—especially if your business relies on landing a few big fish, rather than netting many smaller ones. At this final stage of the buying cycle, your team should be familiar with the particular challenges or barriers each prospect faces. You can select the right marketing assets and customize your message to directly address those topics.

## A partnership with CB&A can optimize your marketing efforts and build media relationships in the education industry

Knowing when and how to optimize your marketing at various stages in the education buying cycle is valuable information. But you can only get so far without institutional knowledge or media connections within the industry.

CB&A can help. We can leverage over 30 years of experience to solve your most complex marketing problems, from sales renewals in the face of funding fluctuations to ABM strategies for specific school districts.

Unlike a generalist marketing agency, we understand the important nuances of the industry. You won't waste time explaining your organizational charts or breaking down who has purchasing power within a school district. As experienced education marketers, we've also built strong PR connections that provide a shortcut to major earned and shared marketing opportunities.

**We'd love to help you get started on optimizing your marketing and PR. [Talk to us.](#)**

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*We are grateful to Kevin Custer and Rita Ferrandino, who contributed a [CB&A Insights guest post about the education buying cycle.](#)*