

## Sales Tips

Every vertical has its own quirks, its own idiosyncrasies. The more you understand what makes each business special, the better you can sell to it. Use this guide, in conjunction with the product sell sheet also provided, to better understand the challenges and opportunities in the education industry. You'll be better able to offer solutions that make a difference while helping customers manage more efficiently and market more effectively.

### Industry Insight

- Many public schools use a bid process (RFP/RFQ/RFI) – build a relationship with the business office manager or payroll department. They will be instrumental in helping you get through the bid process.
- Cost conscious – be prepared to offer alternative timing to fit a budget review period
- Know/learn when the budget year begins – departments forecast purchases
- Typically automates payroll
- Automated student grade/attendance reporting
- District or school sizes average 10-1,000 employees (permanent)
- Appreciates the convenience of a single-source vendor
- Inventory control is always a challenge – suggest smaller, more frequent order cycles
- Ideas for educational materials (e.g., safety and security, etc.)
- Trust, flexibility and credibility are key to building the relationship
- Offer information about providing systems for organizing records

### Key Resources

- Business Office/Business Manager/Payroll key contacts for business checks, forms and other core products.
- PTA and sports groups are key contacts for image, promo and apparel products tied to fundraising and local attendance.

### EDUCATION MARKET INCLUDES

- K-12 Schools
- Colleges and Universities
- Community Colleges
- Technical Colleges
- Libraries and Information Centers
- Student Organizations
- Misc. School and Educational Services
- PTA Groups and Booster Clubs
- Alumni Associations

### Related Markets for Larger Organizations:

- Child Care services, Community Organizations, Scouting and more

### DEPARTMENTS

- Business Office (Checks/forms/stationery)
- Superintendent of Schools
- Principals/Department Heads
- Administrator
- Human Resources/Human Capital Management
- PTA – especially if they are active (full-color/apparel/promo)
- Alumni Association
- Physical Education (sports programs and after-school programs)
- Recruiting

## How This Market Grows

- Continuous development of programs and activities for students
- Overall educational standing within the city, county, state and country
- Affiliations with other schools and colleges
- Recruiting efforts for students, teachers, assistants and counselors
- Parent/Student/Alumni referrals
- Athletic programs
- Student clubs (e.g., debate, volunteerism, exchange programs, 4-H, band, etc.)
- Special projects
- Fundraising activities
- Expanding school grounds
- PTA involvement and community work
- College prep
- Before- and after-school programs
- School stores

## Peak Buying Periods

- During budget planning
- Understand the semester breakdown within the community/district. Approach them before the semester planning meetings begin.
- Year-end: lots of year-end tax preparation. Most start gathering bids in August. Offer early bid discounts for tax forms – a lot of turnkey bidding (e.g., print, variable imaging, mailing tax forms, etc.)
- Fiscal year-end could be June, August or December. Be aware of budget sensitivity. If there is money available at the end of the year, sometimes it will be used to purchase supplies for the upcoming year.

## Probing Questions

- What type of system do you currently use for late arrivals and early dismissals?
- Do you allow visitors during school hours? If so, what type of sign-in/sign-out system do you use?
- Is each teacher responsible for developing supporting course materials for standardized programs (e.g., Every Student Succeeds Act, etc.)?
- How do you work with the PTA today?
- How do you help share information among schools in the feeder pattern and prepare students for their transitions through graduation (elementary to middle school, middle school to high school)?
- How do you prepare graduating seniors for their transition to college?
- How do you uncover students' future goals? Does the counselor/advisor use a form to help gather the information?
- What software applications and versions do you use?
- How do you currently manage payroll?
- How do you manage filing space?
- When you work on community projects, are you responsible for creating materials?
- How do you manage your student uniforms (could be school uniforms or team uniforms)?
- Are you a licensed school?

## MARKET IMAGE

- Exhibit professionalism, reliability, a safe environment, focus on learning, etc.
- Focus on student success, advancement, and growth to build and maintain a positive reputation and word of mouth recommendations
- Stay abreast of current events and relevant information
- Expand programs and activities applicable to student growth
- Community involvement; participation in local events
- Cooperative environment with parents and students
- Attentive to parent/community concerns
- Volunteer activities, e.g., public parks, zoos, libraries, senior centers, etc.

## Probing Questions (continued)

- Do you prefer I work with you, or is there someone else with whom I should work?
- How do you inform the local community about major events?
- Do you conduct fundraising events throughout the year? If so, in how many events do you participate or coordinate?
- Are you licensing your school logo for fundraising activities?
- You have a full sports program here – where are you getting your team supplies?

### If not able to discover prior to the meeting:

- Do you have an affiliation with other schools or colleges?
- When does planning begin for the next school term and/or year?

## Sales Approach

- Lead with your strengths – start with solidifying your relationship with the Business/Office Manager and they may help you reach the PTA and other departments
- Present yourself as a professional solutions provider who has an understanding of the surrounding area and community/district
- Be sensitive to the education levels of the school with whom you are working – offer options and solutions targeted at the right level (e.g., kindergarten, elementary, etc.)
- Do your homework – know what programs, sports, before-and after-school activities are offered
- Be flexible about appointment times – avoid early mornings and late afternoons (due to arriving and departing students)
- Listen carefully to the educational goals and challenges they face. Begin creating a relationship with the Business Office. Focus on your ability to customize forms to fit their software
- Printed products (checks, forms, etc.) are the focus of the Business Manager who may control various departments and other locations within the district
- Be prepared to discuss your flexibility and ability to manage multiple accounts within the schools tied to each department
- PTA: Have a general knowledge of the activity level of the PTA. Are they involved with the school sports programs, fundraising activities, boosters, etc?
- Approach like any other business when you are presenting promo and apparel items

## BUSINESS CONSIDERATIONS

- Budget constraints
- Public schools – bid qualification process RFP/RFQ/RFI – understand the policies
- Number of employees
- Multiple approvals
- Department-specific – affects budgets
- Community involvement
- Classroom size
- Security and safety
- PTA involvement
- Individual class projects
- Financial support for teachers – out-of-pocket expenses
- District/regional allocation restrictions or changes

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