



School Marketing Language Calibration Workshop

Moderator Notes

This is the School ID method for a calibration workshop. The structure, timing, and materials below are how we'd approach it, designed for a 90-minute session with 6-10 people.

Use it as is. Adapt parts of it. Or use it as inspiration to design something that fits your school's culture and constraints. The worksheets can be printed (A3 size or larger recommended), made into digital templates, or simply drawn on a real or digital whiteboard. **The point isn't the workshop. The point is the conversation.**

What This Workshop Is For

To help school leadership develop a working understanding of brand, marketing, communications, and admissions as distinct disciplines and aligning everyone on how those disciplines actually operate at your school.

This is a guided learning workshop, not a pure peer collaboration. The marketing leader running it brings a grounded understanding of the disciplines into the room. The school as a whole then works out how those disciplines apply to specific projects.

Two things happen at once:

- **Non-marketers (school leadership, education leaders, sometimes admissions)** leave with a better understanding of what marketing, communications, and brand actually are as disciplines, and how they show up in school work.
- **Marketers (marketers, communicators, visual creatives, sometimes admissions)** leave with a better understanding of how their disciplines apply to this school's culture, structure, and priorities.

Outputs:

- **Two Project Worksheets** (the open house and a real upcoming project) showing how leadership and the four disciplines each contribute.
- **A Collective Jargon Board:** every term, acronym, or piece of insider language that surfaced during the workshop.
- **A Reflection Sheet** with the school's working definitions of brand, marketing, communications, and admissions, plus a description of leadership's role, plus three to five shared jargon definitions.

Who Should Be in the Room

Aim for 6-10 people with a deliberate mix:

- The Head of School or a senior member of education leadership
- At least one person from marketing
- At least one person from communications (or marketing/comms if that's one role)
- At least one person from admissions
- One or two division heads, principals, or program coordinators

If your school has separate fundraising, development, or advancement leadership, include them too.

Why the mix matters: the workshop's value comes from working through definitions across roles. A marketing-only group will produce a marketing-only version of the truth. A leadership-only group will leave without learning what they came to learn. The point is to get the people who use these terms differently into the same room, working through the same problem.

A Note on the Five Zones

The Project Worksheets have five zones, but they aren't all the same kind of thing.

Brand, Marketing, Communications, and Admissions are disciplines: bodies of work with their own purposes, methods, and language. The worksheets capture what each discipline contributes to the project being discussed.

School Leadership is different. School Leadership is its own discipline, but not the one this workshop is defining. Our lens is brand, marketing, communications, and admissions work. Within that lens, school leadership shows up as a partner. Making decisions, setting priorities, asking questions, and shaping the work without doing it directly. The worksheets capture how leadership engages with the project, not what leadership is.

This distinction matters during the workshop. Defining what marketing contributes is about clarifying the work. Describing leadership's role is about clarifying how leadership shapes that work. Both are essential. They're just answering different questions.

Facilitation

Lead facilitator: Marketing, Communications, or Admissions leadership.

This isn't pure facilitation. The lead is a knowledgeable host. They come in with a working grasp of what brand, marketing, communications, and admissions mean as disciplines, and they guide the room toward understandings that are grounded in real marketing thinking. At the same time, they stay genuinely open to how those concepts apply at this specific school.

The lead facilitator's job is to:

- Bring conventional marketing understanding into the room as a baseline
- Guide the conversation so the room arrives at workable, accurate definitions
- Resist the pull to lecture. The school still owns how the disciplines apply here
- Push back gently on common misunderstandings (see “Where to gently push back” below)
- Capture what people say and reflect it back

The lead facilitator's job is not to:

- Hand the room textbook definitions and ask them to memorize them
- Validate every contribution equally regardless of accuracy
- Stay neutral when the room lands on a clearly broken framing

Co-facilitator (recommended): one additional person. A co-facilitator captures the Collective Jargon Board while the lead drives the conversation. Without a co-facilitator, the lead has to split attention between facilitating and scribing — which usually means the jargon board suffers.

If a co-facilitator isn't available, build in short pauses for the lead to capture jargon between discussion segments.

Where to Gently Push Back

Most of this workshop is about the school working out its own answers. But a few common misunderstandings aren't matters of school-specific structure. They're just incomplete framings that should be challenged. The lead facilitator should be ready to push back, gently but clearly, when these come up:

- **Brand is the logo.** Brand is how the school is perceived and what it promises. The logo is a signal of the brand, not the brand itself. If brand keeps getting defined visually, redirect.
- **Marketing is just storytelling or content.** Storytelling is part of it. But marketing is also strategy, audience understanding, channel selection, and reach. If marketing keeps getting reduced to “the writing” or “the social posts,” redirect.
- **Communications is just sending out information.** Communications is about relationship, trust, and shared meaning with the existing community. It's how the school speaks and how that speech either reinforces or contradicts the brand. If comms keeps getting reduced to email volume, redirect.
- **Admissions is the marketing team's report card.** Admissions outcomes are influenced by brand, marketing, communications, school culture, pedagogy, demographics, and many other factors. If enrollment decline keeps getting framed as a marketing failure, redirect.

These pushbacks should be brief and generous — never lectures. Something like: “Worth slowing down on that. Brand is bigger than the logo. Let me explain how I think about it, and let's see how it lands here.”

Materials

- Project Worksheet — Open House (one shared, printed or projected)
- Project Worksheet — Real Project (one shared, printed or projected)
- Collective Jargon Board (digital whiteboard, sticky notes on a wall, or quadrants drawn on a real whiteboard)
- Reflection Sheet (one shared, printed or projected)
- Brainstorm space — a separate area (whiteboard section, sticky notes, or digital list) for raw contributions before they're categorized
- Markers or digital tools for live note-taking
- Visible timer

The Collective Jargon Board can be as simple as a section of whiteboard, a flipchart page, or a column in a digital whiteboard. The point is that it stays visible the whole time and is easy to add to.

Workshop Phases at a Glance

Setup & introduction (5 min)

Phase 1: The Open House Trial Project (25 min)

Phase 2: Real project application (30 min)

Phase 3: Reflection & shared definitions (25 min)

Closing (5 min)

Setup (5 min)

Lead facilitator action:

- **Welcome the room.** Briefly explain the goal: to develop a shared understanding of what marketing, communications, and brand are as disciplines, and how they actually operate at this school.
- **Walk through the workshop structure:** a trial run on the open house, then the real project, then a reflection that pulls everything together.
- **Introduce the Collective Jargon Board.** Explain that any term, acronym, or piece of insider language that comes up gets captured here as we go. Don't worry about whether something "qualifies," capture broadly. We'll sort and define in Phase 3.
- **Briefly explain the asymmetry on the worksheets:** the four disciplines (Brand, Marketing, Communications, Admissions) capture what the discipline contributes. School Leadership captures how leadership engages: what they ask, what they approve, what they shape.

Important framing:

The lead facilitator brings a working understanding of these disciplines into the room. Some of what comes up will need challenging or refinement. That's not a failure of the workshop, that's the workshop doing its job.

Phase 1: Trial Project — The Open House (25 min)

Why this comes first: The open house is a familiar shared experience. Working through it together surfaces real definitions and real jargon naturally, without forcing the room to debate concepts in the abstract. It also gives the room a low-stakes practice round before applying the framework to a real project.

Lead facilitator action:

- **Pull up the Open House Worksheet**, and have a separate brainstorm space ready (whiteboard area, sticky notes, or digital list).
- **Step 1: Brainstorm (about 8-10 min).** Ask the room: “What needs to happen to pull off an open house? Big things, small things — let’s get them out.” Capture contributions in the brainstorm space without categorizing yet. Aim for 12-15 contributions before moving on. Watch the time. When you’re about halfway through the phase, move into categorizing whether or not the brainstorm feels exhausted.
- **Step 2: Categorize (about 10-12 min).** Shift gears. “Now let’s place these. For each one: “is this Brand work? Marketing? Communications? Admissions? Or is it something leadership is doing?” Move each contribution into its zone on the worksheet. This is where the real teaching happens. The act of placing each contribution forces the room to engage with what each zone actually is.
- **Step 3: Fill gaps (about 5 min).** With the worksheet partially filled, work through any zones that feel thin. “Anything missing for Brand? What about Communications?” Push for completeness.
- When the room offers something incomplete or misaligned, this is the moment to redirect. Use the “Where to gently push back” guidance.
- **Watch for contributions that could go in two zones: those are the bridging moments.** Note them in both, and call them out as the kind of work that depends on collaboration.

Co-facilitator action:

- Capture jargon on the Collective Jargon Board as it comes up. IB-specific terms, marketing acronyms, school-internal language, words that mean different things to different people — all of it goes on the board.
- Don’t filter or categorize, except bridging terms: the same word being used differently by different people. Note them on the jargon board explicitly.

Watch for:

- **Brainstorming running long.** If the room is enjoying the brainstorm, it’s tempting to keep going. But categorization is where the teaching happens. Don’t sacrifice it.
- **The room defaulting to one discipline doing all the work.** Push them to consider what the others contribute.
- **Bridging terms:** the same word being used differently by different people. Note them on the jargon board explicitly.
- Brand being defined visually, marketing being reduced to storytelling, comms being reduced to email volume. These are the moments to gently push back.

Phase 2: Real Project Application (30 min)

Why this is the heart of the workshop: Practicing on the open house was safe. Applying the framework to a real project is where the calibration actually does work.

Lead facilitator action:

- **Choose a project together.** Should be something on the school's near-term calendar with real stakes. Examples: a website redesign, a rebrand, a milestone year (25th anniversary, centennial), a capital campaign, a major program launch.
- Pull up the Real Project Worksheet (same structure as the open house) and a fresh brainstorm space.
- **Step 1: Brainstorm (about 10-12 min).** Same approach as Phase 1. "What needs to happen to pull this project off?" Capture contributions in the brainstorm space without categorizing yet. The brainstorm here may go deeper than the open house. Bigger projects have more dimensions. Watch the time: at the halfway point of this phase, move into categorizing.
- **Step 2: Categorize (about 12-15 min).** Place each contribution into its zone on the worksheet. Push deeper than you did with the open house. The categorization here will be harder and more contested. That's a sign the workshop is working.
- **Step 3: Fill gaps (about 3-5 min).** Work through any zones that feel thin. Compare to the open house worksheet. What's different? Why?
- Continue using the "Where to gently push back" guidance as misunderstandings come up.

Co-facilitator action:

- Continue capturing jargon on the Collective Jargon Board.
- Watch for terms that surfaced in Phase 1 and are now showing up again. Those are the ones that probably matter most.

Watch for:

- **Differences from the open house exercise.** Where does this project change the discipline contributions? Why? Those differences are often where the definitions are still working themselves out.
- **Disagreement between the room.** If marketing thinks they own something and leadership thinks they own it, that's exactly the kind of misalignment the workshop is designed to surface. Don't smooth it over. Name it.

Phase 3: Reflection & Shared Definitions (25 min)

Why this is the takeaway phase: The two project worksheets and the jargon board now contain everything the workshop has surfaced. This phase pulls the insights together into a Reflection Sheet the school keeps using.

Step 1: Define what each zone is, based on what you saw (about 15 min)

Look at the two project worksheets together. Across both projects, what was Brand actually contributing? What was Marketing doing? Communications? Admissions? How did leadership engage?

For each zone, write a working definition or role description on the Reflection Sheet. Use the worksheets as evidence. The definitions should reflect how this school actually operates but should also stay grounded in accurate understandings of what each discipline is.

Lead facilitator prompts:

- “Looking at both projects, how would we describe what marketing does at our school?”
- “What was leadership consistently doing across both projects?”
- “Where did communications show up in both? What was its core job?”

The lead facilitator’s role here is active. If the room’s working definition of brand is just “the logo and colors,” push for more. If marketing is being defined too narrowly, expand it. The room owns the school-specific application, but the facilitator owns the accuracy of the foundation.

Step 2: Pick the most important jargon (about 5-7 min)

- Look at the Collective Jargon Board. Choose three to five terms that:
- Came up repeatedly across both projects, OR
- Surfaced misunderstandings during the discussion, OR
- Are bridging terms (same word, different meanings depending on the speaker), OR
- Felt like they needed shared definitions to support the upcoming real project.

Step 3: Define those terms (about 3-5 min)

For each chosen term, write a short shared definition on the Reflection Sheet. These become the start of the school’s working glossary.

Optional: The remaining jargon on the board doesn’t have to disappear. It can be the start of an ongoing list the school examines internally — terms to watch, terms that might need glossaries for prospective families, terms that surface again in future planning sessions.