



DYNAMIC VALUE PROPOSITION: RELEVANCY TOOLKIT

Creating a Market-Tested Customer Profile

This toolkit aims to help school leaders better understand their market, test assumptions about customers, and prioritize families' needs.



Independent School Executive Forum

Project Director

Rachel Brown

Contributing Consultants

Breanna Hill

Sarah Podolsky

Executive Director

Olivia Rios

Legal Caveat

EAB Global, Inc. ("EAB") has made efforts to verify the accuracy of the information it provides to partners. This report relies on data obtained from many sources, however, and EAB cannot guarantee the accuracy of the information provided or any analysis based thereon. In addition, neither EAB nor any of its affiliates (each, an "EAB Organization") is in the business of giving legal, accounting, or other professional advice, and its reports should not be construed as professional advice. In particular, partners should not rely on any legal commentary in this report as a basis for action, or assume that any tactics described herein would be permitted by applicable law or appropriate for a given partner's situation. Partners are advised to consult with appropriate professionals concerning legal, tax, or accounting issues, before implementing any of these tactics. No EAB Organization or any of its respective officers, directors, employees, or agents shall be liable for any claims, liabilities, or expenses relating to (a) any errors or omissions in this report, whether caused by any EAB Organization, or any of their respective employees or agents, or sources or other third parties, (b) any recommendation by any EAB Organization, or (c) failure of partner and its employees and agents to abide by the terms set forth herein.

EAB is a registered trademark of EAB Global, Inc. in the United States and other countries. Partners are not permitted to use these trademarks, or any other trademark, product name, service name, trade name, and logo of any EAB Organization without prior written consent of EAB. Other trademarks, product names, service names, trade names, and logos used within these pages are the property of their respective holders. Use of other company trademarks, product names, service names, trade names, and logos or images of the same does not necessarily constitute (a) an endorsement by such company of an EAB Organization and its products and services, or (b) an endorsement of the company or its products or services by an EAB Organization. No EAB Organization is affiliated with any such company.

IMPORTANT: Please read the following.

EAB has prepared this report for the exclusive use of its partners. Each partner acknowledges and agrees that this report and the information contained herein (collectively, the "Report") are confidential and proprietary to EAB. By accepting delivery of this Report, each partner agrees to abide by the terms as stated herein, including the following:

1. All right, title, and interest in and to this Report is owned by an EAB Organization. Except as stated herein, no right, license, permission, or interest of any kind in this Report is intended to be given, transferred to, or acquired by a partner. Each partner is authorized to use this Report only to the extent expressly authorized herein.
2. Each partner shall not sell, license, republish, distribute, or post online or otherwise this Report, in part or in whole. Each partner shall not disseminate or permit the use of, and shall take reasonable precautions to prevent such dissemination or use of, this Report by (a) any of its employees and agents (except as stated below), or (b) any third party.
3. Each partner may make this Report available solely to those of its employees and agents who (a) are registered for the workshop or program of which this Report is a part, (b) require access to this Report in order to learn from the information described herein, and (c) agree not to disclose this Report to other employees or agents or any third party. Each partner shall use, and shall ensure that its employees and agents use, this Report for its internal use only. Each partner may make a limited number of copies, solely as adequate for use by its employees and agents in accordance with the terms herein.
4. Each partner shall not remove from this Report any confidential markings, copyright notices, and/or other similar indicia herein.
5. Each partner is responsible for any breach of its obligations as stated herein by any of its employees or agents.
6. If a partner is unwilling to abide by any of the foregoing obligations, then such partner shall promptly return this Report and all copies thereof to EAB.

Table of Contents

How to Use This Toolkit. Pg. 4

Use this guidance for an overview of how to use this toolkit and how it fits into the larger 3-step process to achieve a dynamic value proposition.

Brainstorming Potential Value Differentiators Exercise. Pg. 5

Use this section to help you reflect on school offerings that could be used as value differentiators for your school.

Identifying Customer Jobs, Pains, and Gains.Pg. 8

Use this section to begin to identify the jobs, pains, and gains of independent school families in your market.

Customer Profile Prototype Template.Pg. 14

Use this section to support you in creating a Customer Profile Prototype for selected customer segments in your market.

Customer Profile Market Testing Guide. Pg. 18

Use these tools to develop, administer, and analyze individual and group market listening sessions for families in your market to help you complete a market-tested Customer Profile.

How to Use This Toolkit

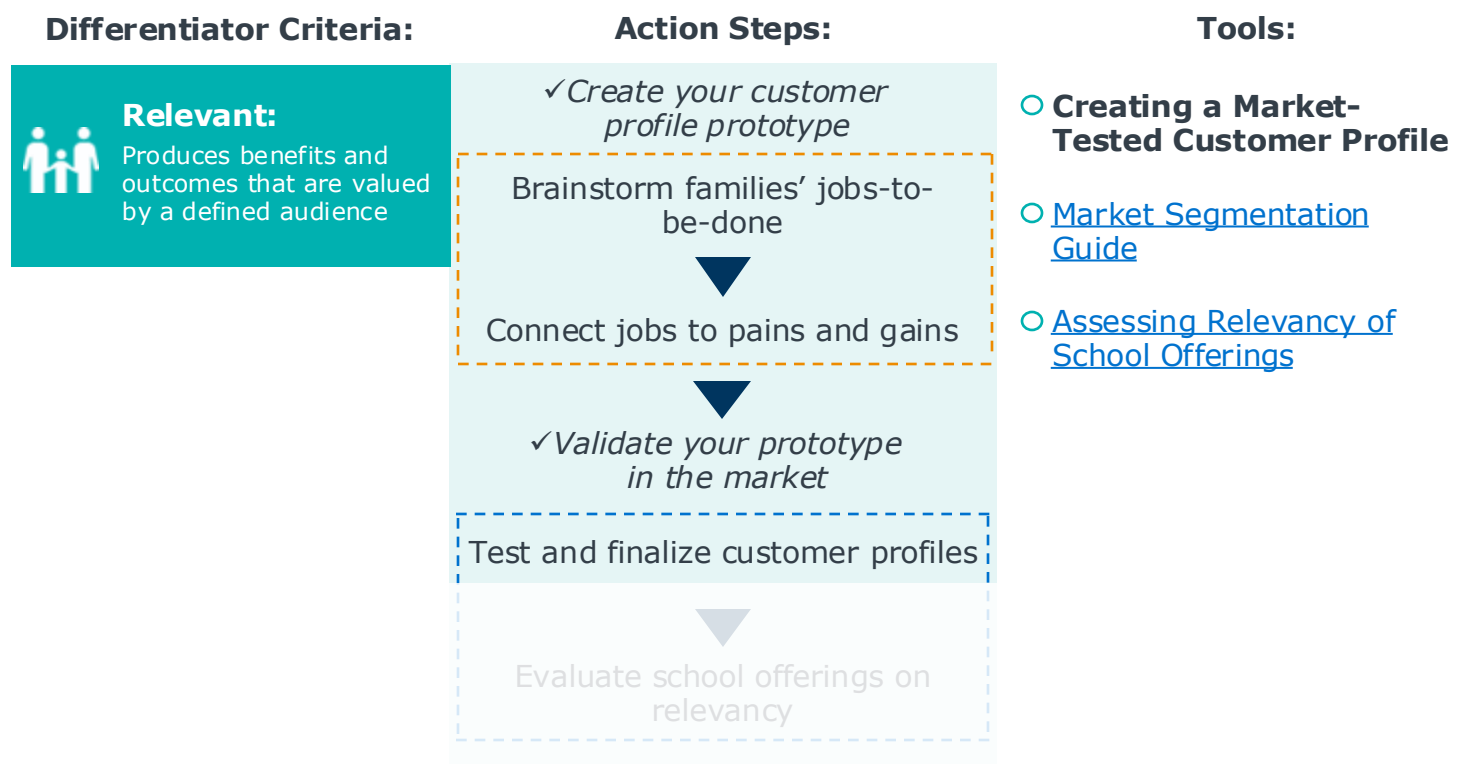
Great programs don't matter if they don't matter to your audience. Too often, schools invest in offerings without clearly understanding what families truly value. The first step to building relevance is developing a clear, data-informed customer profile that captures parent and student needs.

This toolkit is *one of three relevancy toolkits* that will assist schools in completing step 1 of EAB's 3-step dynamic value proposition. Refer to **p. 5** of [EAB's Value Proposition Management System Implementation Guide](#) for an overview of the 3-step process, and **p. 7** for an overview of step 1.

This toolkit starts with a value differentiator brainstorming exercise to help schools identify which of their offerings truly set them apart. Since many schools lack the expertise to evaluate this objectively, the second tool guides them through understanding the jobs, pains, and gains of families in their market. The third tool helps translate that insight into a customer profile prototype. The final tool walks schools through collecting and analyzing real market data to build a tested customer profile.

See the graphic below for a step-by-step overview and track your progress using the action plan checklist on **pp. 8–9** of the Implementation Guide.

The Value Proposition Management System: Step 1





EAB's Dynamic Value Proposition

Brainstorming Potential Value Differentiators Exercise

Use this section to help you reflect on school offerings that could be used as value differentiators for your school.

Value Differentiator Brainstorming Exercise

Review the instructions below for this exercise, which is designed to help you reflect on your institutional offerings and create an initial list of the offerings that could be used as value differentiators for your school. Then, complete the worksheet on **p. 7**.

Instructions

On **p. 7**, write down **at least 3** institutional offerings that could be used as value differentiators (i.e., your school's high-quality programs, services, traits, or innovations) for your school.

Review the example institutional offerings listed below for each category to jumpstart your thinking, reflecting on which of these offerings could work as potential institutional differentiators for your school. These may be offerings already found on your school website or any others that you might consider part of your value proposition or as differentiators to your customers.

70+ Ways Today's Schools Talk About Their Value Proposition

Academic Programming Program Variety Program Quality Unique Programs Flexible Scheduling Pedagogical Method Class Size	Student Services Advising Mental Health College Counseling Financial Aid Support Technology	Service Quality Levels Personalized Service One-Stop Service Concierge Service	Student Experience Study Abroad Student Organizations Service Learning Athletics Co-Ops / Internships Facilities Student Research
Special Services for Target Students International Neurodiverse DEIB Services	Student Outcomes Selective College Acceptance Distinguished Alumni Profiles Awards and Recognition	Staff Characteristics Credentials Background Teaching Experience Industry Experience Technical Expertise Availability	Shared Values Sustainability Social Justice Community Service Wellness Outdoor Life Innovation
Distinctive Location Proximity Beauty and Climate Cultural Attractions Recreation Options Regional Economy	Partner Networks Alumni Community Employers Industries Global	Pricing Low Net Price Low Relative Price Predictable Price Payment Options Need-Based Aid Merit Aid	Brand Character Exclusivity Quality Higher Purpose Value for Money Lifestyle Disruptive

School Offering Reflection

For each institutional offering that you identify as a potential differentiator, answer the three reflection questions to help you start to consider if this offering is **relevant** to your audience, **distinctive** from competitors, and **provable** in your market.

Use the definitions below to guide you:



Relevant:

Produces benefits and outcomes that are valued by a defined audience



Distinct:

Provides offerings that competitors can't at same price or quality



Provable:

Messaged clearly to defined audience with evidence to back up claims

Institutional Offering:

Reflection Questions:

How do you know that this institutional offering is relevant to your audience?

How do you know that this institutional offering is distinctive from your competitors?

What evidence do you have to prove this institutional offering to your market?



EAB's Dynamic Value Proposition

Identifying Customer Jobs, Pains, and Gains

Use this section to begin to identify the jobs, pains, and gains of independent school families in your market.

Writing Jobs of Independent School Families

Review the guide below, which focuses on how to write the functional, emotional, and social jobs of families in your market. Then, complete the worksheet on **p. 10**.

Customer Jobs:

Functional, social, and emotional tasks families want to accomplish, problems they want to solve, and needs they want to satisfy

Use below formula for writing each 'job to be done':

verb + object of the verb + (optional) contextual clarifier

Example "Jobs" of Independent School Families



Functional Jobs

- Provide rigorous academic environment for talented student
- Improve academic support system for student who's behind



Emotional Jobs

- Improve student's resilience when facing setbacks
- Reduce anxiety about student's safety and wellbeing



Social Jobs

- Form connections with other like-minded families
- Look good in front of extended family and friends

Quick Tips for Writing Your Families' Jobs

DON'T

- Stick only to brainstorming surface-level jobs
- Assume all your families are the same
- List a job as an outcome or as a solution
- Write each job from your perspective or that of other school leaders
- Focus only on the practical needs of your families
- Force your jobs to fit into your current value proposition

DO

- Ask "why" until you understand underlying jobs that drive families' decisions
- Understand the context of your families
- Consider a family's "goal state," but focus first on what they need to accomplish
- Write each job from the perspective of your families
- Include the social and emotional jobs your families want accomplished
- Imagine jobs outside of your current value proposition

Source: Ulwick, T., [The Jobs-to-be-Done Canvas](#), Strategyn, 2024; Osterwalder, Pigneur, Bernarda, Smith, A., Value Proposition Design, 2014; Brand Genetics, [Jobs To Be Done Upgrade Humans, Not Products](#); NAIS, [Why Do Parents Choose Independent Schools?](#), 2018; EAB interviews and analysis.

Brainstorming “Jobs” Worksheet

Complete this worksheet to brainstorm what “jobs” most families in your school’s market want to accomplish. Use the formula to write each “job.” If brainstorming jobs is difficult, consider jobs that the example family persona listed below may want accomplished.



Formula:

verb + object of the verb + (optional) contextual clarifier



Use example family persona if helpful for brainstorming:

- Family Name: The Smith Family
- Children: Timothy (age 10), Claire (age 16)
- Socioeconomic Background: \$300-400K yearly income
- Additional Relevant Info: Family recently moved to area

- 1 FUNCTIONAL:** Brainstorm at least two functional jobs that you think prospective and current independent school families want accomplished.

- 2 EMOTIONAL:** Brainstorm at least two emotional jobs that you think prospective and current independent school families want accomplished.

- 3 SOCIAL:** Brainstorm at least two social jobs that you think prospective and current independent school families want accomplished.

Writing Pains and Gains of Independent School Families

Review the guide below and the examples on **p. 12** to learn how to brainstorm the potential gains and pains of prospective and current families. Then, complete the worksheet on **p. 13**.

Customer Pains:

Negative outcomes, risks, and obstacles your families want to avoid because they prevent them from getting a job done (well)

Questions for Brainstorming Your Families' Pains:

- What are difficulties and challenges families face when trying to complete a job?
- What is too costly? What about a job takes families a lot of time, costs too much money, or requires significant effort?
- What hassles or annoyances give families a headache when trying to complete a job? What makes them feel bad?
- What negative social consequences do families fear if they don't complete a job or complete a job poorly? A loss of face, power, trust, status?
- What risks do your families fear if they don't complete a job? What are they afraid could go wrong?
- What is keeping your families awake at night? What are their big issues, concerns, and worries if a job is not completed or is difficult to complete?
- What common mistakes do families make when trying to complete a job?
- What barriers would keep a family from completing a job?

Customer Gains:

Positive outcomes and benefits your families must have, expect, desire, or dream to achieve from getting a job done (well)

Questions for Brainstorming Your Families' Gains:

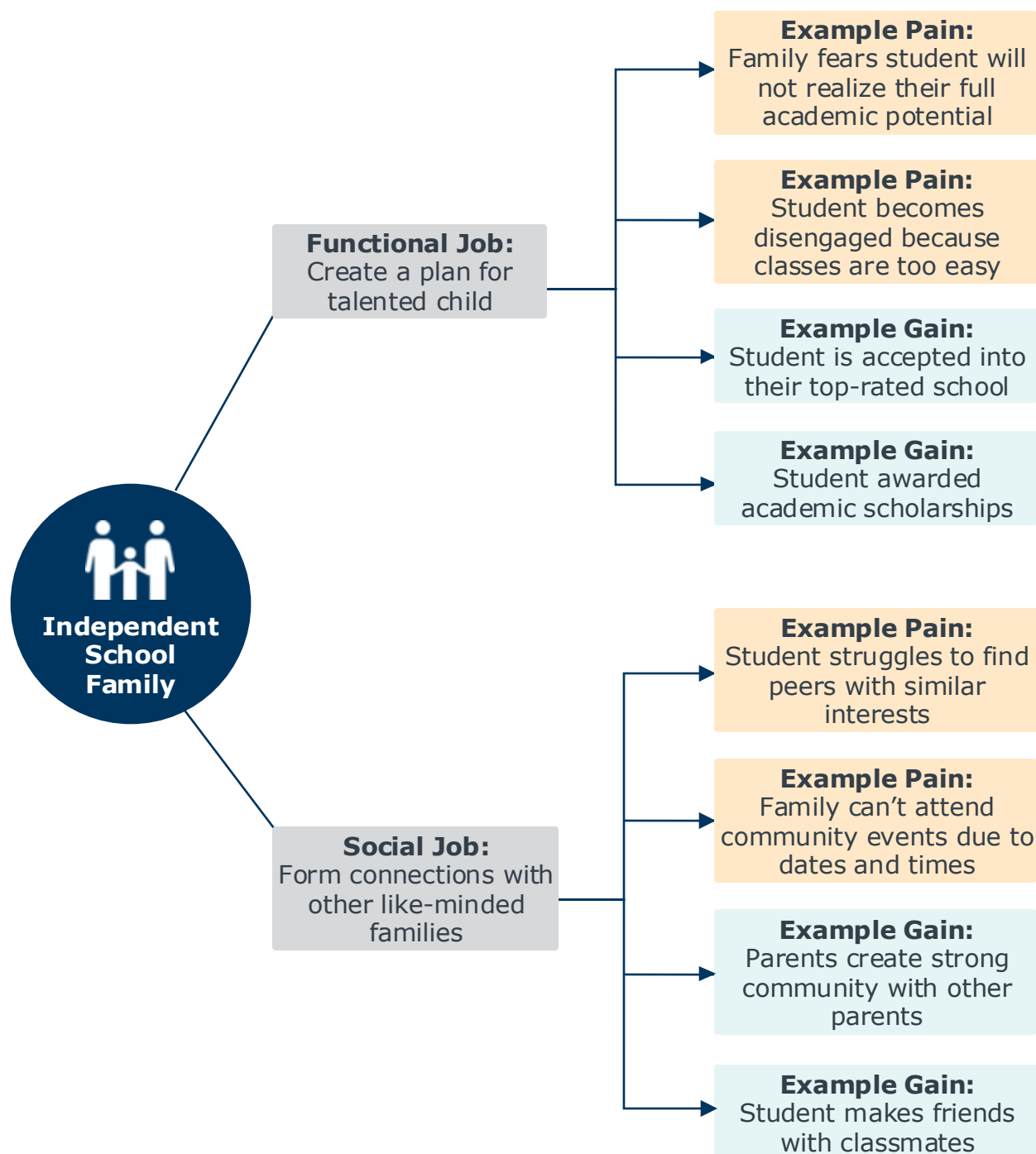
- How do your families measure success when completing a job? How do they gauge performance or cost?
- What savings in terms of time, money, and effort do families value when trying to complete a job?
- What positive emotions do families feel after successfully completing a job?
- What makes families look good to others when completing a job? What increases their status or influence?
- What quality levels do families expect, and what do they wish there was more or less of?
- What would make your families' jobs or lives easier?
- What are your families looking for most when trying to complete a job?
- What do families dream about? What do they aspire to achieve, or what would be a big relief to them?

Tips for Writing Family Pains and Gains

- ▶ Write each pain and gain as concretely as possible to differentiate them from each other
- ▶ Go beyond just listing the pains and gains that directly relate to your current value prop
- ▶ Unearth as many pains and gains as you can to deepen your understanding of families

Examples: Writing Families' Pains and Gains

Use the example pains and gains listed for each job below as a guide for completing the worksheet on **p. 13**.



Source: Osterwalder, A. Pigneur, Y., Bernarda, G., Smith, A., *Value Proposition Design*, 2014; NAIS, [Why Do Parents Choose Independent Schools?](#), 2018; EAB interviews and analysis.

Brainstorming Pains and Gains Worksheet

Using the jobs identified on **p. 10**, write two potential gains and two potential pains most families in your market experience for one functional, one emotional, and one social job. Use the guidance on **p. 11** to help you brainstorm pains and gains. If difficult, try using the example family persona below to help brainstorm pains and gains.

Use example family persona if helpful for brainstorming:

- Family Name: The Smith Family
- Children: Timothy (age 10), Claire (age 16)
- Socioeconomic Background: \$300-400K yearly income
- Additional Relevant Info: Family recently moved to area

Functional Job:

Pain:

Pain:

Gain:

Gain:

Emotional Job:

Pain:

Pain:

Gain:

Gain:

Social Job:

Pain:

Pain:

Gain:

Gain:



EAB's Dynamic Value Proposition

Customer Profile Prototype Template

Use this section to support you in creating a Customer Profile Prototype for selected customer segments in your market.

Overview: Customer Profile Prototype




Follow the instructions below to create at least one Customer Profile Prototype that includes jobs, pains, and gains. Use the example on **p. 16** and the template on **p. 17** to create your Customer Profile Prototype.

Instructions




1. Review the example Customer Profile Prototype for a traditional independent school family customer segment on **p. 16**.
2. Using the template on **p. 17**, begin to compose a Customer Profile Prototype for your traditional independent school family customer segment. Keep this prototype as exhaustive as possible. Later, you will consider how to prioritize the top 3-4 jobs your school should be aiming to fulfill.
3. EAB recommends sharing your Customer Profile Prototype(s) with your senior leadership team to get their feedback. Make sure to explain the basics behind writing customer jobs, gains, and pains before you overview your prototypes.
4. *Optional: Review the additional customer segment examples in the [Market Segmentation Guide toolkit](#). Then consider creating Customer Profile Prototypes for any non-traditional segments in your market, as they may have different jobs, pains, and gains.*

Customer Profile Prototype Example

Use the example below to guide you in creating your own Customer Profile Prototypes using the template on **p. 17**.

Customer Segment: <u>Traditional Independent School Family</u>		
 Customer Pains	 Customer Jobs	 Customer Gains
<p><i>Write the pains of this segment below:</i></p> <p>Examples:</p> <ul style="list-style-type: none"> • Students become disengaged at school • No specialty classes or extracurriculars align with student's interests • No adults become a trusted adult for student • Student is not accepted into top colleges • Family feels isolated from other families • Family doesn't have time to get to know other families • Student struggles to find peers who share their interests • Student feels alone and doesn't make friends • Student's emotional outbursts are not handled well • Student's behavior worsens 	<p><i>Write the jobs of this segment below:</i></p> <p>Examples:</p> <ul style="list-style-type: none"> • Create a plan for talented child • Form connections with other like-minded families • Help student become a well-rounded person 	<p><i>Write the gains of this segment below:</i></p> <p>Examples:</p> <ul style="list-style-type: none"> • Student is accepted into top-rated schools • Student feels excited about going to school • Student finds extracurricular activities they enjoy • Student forms good relationship with their advisor • Student makes friends with peers • Family become good friends with other families at school • Family feels a sense of belonging • Family feels support from school faculty and staff • Student learns to manage emotions effectively • Student learns to behave and follow rules

Source: Osterwalder, A. Pigneur, Y., Bernarda, G., Smith, A., *Value Proposition Design*, 2014; NAIS, [Why Do Parents Choose Independent Schools?](#), 2018; Fox, G., [How To Use the Value Proposition Canvas](#), 2024; EAB interviews and analysis.

Customer Segment: _____ <i>Key aggregated demographic grouping</i>		
 Customer Pains	 Customer Jobs	 Customer Gains
<i>Write the pains of this segment below:</i>	<i>Write the jobs of this segment below:</i>	<i>Write the gains of this segment below:</i>

eab.com



EAB's Dynamic Value Proposition

Customer Profile Market Testing Guide

Use these tools to develop, administer, and analyze individual and group market listening sessions for families in your market to help you complete a market-tested Customer Profile.

Selecting Your Market Research Strategy

Choose from the strategies on this page to collect input from families in your market about their jobs, pains, and gains. Schools can use one or multiple of these strategies. If using multiple strategies, ideally conduct them in the order listed below. **Pages 20-33** include supporting tools to help you successfully implement these strategies for your school.

► Strategy 1

Embed 2-3 Questions into Scheduled Family Meetings

Supporting Tools

- + Neither time nor resource intensive
- Families have little time to reflect on questions; may not share helpful insights

- Guidelines for Repurposing Family Meetings (**pp. 20-21**)
- Agenda Builder (**pp. 25-26**)
- Notetaking & Summary Guide (**p. 29**)
- Customer Profile Analysis Guide (**p. 31**)

► Strategy 2

Conduct Formal Listening Sessions with Families

Supporting Tools

- + Able to gather robust, representative market data from families
- Time-intensive to organize and conduct

- Communication Templates (**pp. 22-23**)
- Delivery Plan (**p. 24**)
- Agenda Builder (**pp. 25-26**)
- Question Bank (**pp. 27-28**)
- Notetaking & Summary Guide (**p. 29**)
- Customer Profile Analysis Guide (**p. 31**)

► Optional Strategy

Gather Input from Families Outside of Your School

- Integrate the advice on **p. 33** to recruit families in your market for market listening sessions who do not currently attend your school.
- Refer to the Logistical Notes for these sessions on **p. 21**, **p. 24**, **p. 28**, and **p. 31** for guidance on how to implement.

Goal of Market Testing

Regardless of which market research strategy or strategies you select, the overall goal is to develop a market-tested Customer Profile for each customer segment you have identified that you want to investigate. You will then use the market-tested Customer Profile to ensure that your offerings are relevant to families in your market using the Assessing Relevancy of School Offerings toolkit. A market-tested Customer Profile template can be found on **p. 32**.

Repurposing Family Meetings Guide

Use this guide to join established family meetings to ask questions about families' jobs, pains, and gains to inform your market-tested Customer Profile.

Key Logistics to Repurpose Family Meetings



Review Potential Opportunities

- Review all upcoming meetings planned for families at your school, and identify a few that could potentially be repurposed
- Ask senior leadership team about ideal opportunities for these conversations
- Ideally, try to find around 3 meetings that you could potentially join to ensure you're able to speak with a variety of families



Get Permission As Needed

- Check with leader who oversees the meeting to see if you can use a portion of the time for asking families questions, explaining the purpose of your ask
- Indicate the estimated amount of time you'd like to use (ideally 20-30 minutes)



Encourage Family Attendance

- Let families know ahead of time that you will be repurposing a portion of the meeting to learn about families' aspirations
- Include the reason for the session and how the information will be used
- Decide if you can/should offer incentives (e.g., refreshments, gift cards, school merch) for those who attend and participate



Set Key Roles

- There should be one facilitator and one notetaker for each meeting
- See **p. 29** for resources to support both facilitators and notetakers

Repurposing Family Meetings Guide (cont.)

Key Logistics to Repurpose Family Meetings (cont.)



Build Short Agenda for Each Meeting

- Select topics from the Agenda Builder on **pp. 25-26** to help guide these meetings
- Review the question bank on **pp. 27-28**, and select 4-5 questions that you think are most important to ask based on information you need from families



Take Notes

- Immediately after the meeting, write down what you think families' top jobs, pains, and gains are, based on their answers to your questions, using the template on **p. 30**
- Note any other key takeaways from the meeting as well

Optional: Combine with Formal Market Listening Sessions

- If also conducting formal market listening sessions, attempt to repurpose meetings *before* conducting market listening sessions so you can use info gathered to inform the input sessions
- Let families know about the upcoming opportunity to participate in the formal market listening sessions during these repurposed meetings

Logistical Notes for Families Outside of Your School

- Decide if you want to join an existing event to ask questions to families who are in your market but do not currently attend your school, such as an admissions event (see **p. 33** for ideas for recruiting these families)
- Plan how your introductory message will be specific to these families since they may be unfamiliar with your school

Invitations to Listening Sessions Email Templates

Use the email template below to introduce to families the opportunity to participate in listening sessions. Adapt the language as needed to fit your school culture and session goals. On **p. 23**, EAB has also provided reminder email templates.

Initial Email from Head of School

SUBJECT: Realizing Your Family's Aspirations—please join us for a conversation

EMAIL:

Dear Families,

I want to thank you for choosing to send your students to our school. We know you have many options for schooling and appreciate you choosing us.

To ensure that our school continues to meet your family's needs and creates relevant offerings, we want to gather your input on three specific areas: 1) what your family hopes to accomplish through our school 2) negative outcomes, risks, and obstacles that your family wants to avoid or fears, and 3) positive outcomes or benefits your family wants to receive from school.

To gather insights from you about these three areas, we ask that you participate in our Family Aspirations Conversations so that we can learn directly from you about your family's needs in relation to school. See scheduling details below.

- Please use the link below to complete a poll with your availability. We will follow up to schedule and provide session information within [insert number] days of your poll submission.
- If you have any questions or experience any technical issues, please reach out to **[insert designated leader's name]**, who is spearheading this work.

[Include note about whether these sessions will be with individual families or groups of families together.]

We are partnering with and using resources from a research firm, EAB, to guide us through this process of ensuring that our offerings are valuable to our families. This process starts with your input.

******INSERT POLL LINK******

Thank you in advance for your time in participating in one of our sessions.

Best,

Head of School Name

Invitations to Listening Sessions Email Templates (cont.)

Reminder Email from Head of School

SUBJECT: Reminder: Family Aspirations Session Deadline [INSERT DATE]

EMAIL:

Dear Families,

I want to thank all who have participated in our Family Aspirations Conversations. As a reminder, the goal of these sessions is to ensure that our school continues to meet your family's needs and creates relevant offerings.

For those who have not yet had the chance to participate, please consider filling out the poll to pick a time and day that works for you. Sessions will be available to you until [INSERT DATE].

Thank you again for your time. We are looking forward to receiving your input as integral members of our community.

*****POLL LINK*****

Best,

Head of School Name

Reminder Email from Leader Overseeing Value Proposition Workstream

SUBJECT: Reminder: Family Aspirations Session Deadline [INSERT DATE]

EMAIL:

Dear Families,

So far, we have seen a strong participation from our families in the Family Aspirations Conversations—thank you! It is very important to me that all voices are heard in this process. If you have not yet participated in a conversation, please complete our poll below to schedule a session. As a reminder, sessions will be available to you until [INSERT DATE].

Thank you again for your time, and please feel free to direct any questions to me.

*****POLL LINK*****

Best,

Leader Name

Listening Sessions Delivery Plan

Use the guidelines below to prepare for market listening sessions with individual families and/or groups of families.

Key Logistics to Design Individual Family and Group Market Listening Sessions



Participating Families

- Aim for 4-5 participating families for group sessions
- Decide if you can/should offer incentives (e.g., refreshments, gift cards, school merch) for those participating
- If your school includes an upper school, you may choose to let families bring their upper school student(s) to the sessions as well



Frequency and Modality

- Aim to host 2-3 individual family/group sessions to get an accurate picture and representative information
- Plan to conclude the sessions when you feel that you are not learning new info
- Consider offering online market listening sessions if you think offering this modality would make it easier for families to attend



Length of Sessions

- Sessions should be 30-45 minutes in length; note that group sessions may need to be longer to account for more voices
- Scale agenda and number of questions asked depending on length of time
- Review the question bank on **pp. 27-28**



Key Roles

- There should be at least one facilitator and one notetaker for each session
- See **p. 29** for resources to support both facilitators and notetakers



Communicate Goals and Next Steps

- When in session with families, be sure to explain the reason for the session and how the information will be used
- Review the agenda builder on **pp. 25-26** for scripting



Logistical Notes for Sessions with Families Outside of Your School

- Decide if you want to schedule sessions with families who are in your market but do not currently attend your school (see **p. 33** for ideas for recruiting these families)
- Note any ways your delivery plan may need to alter with these families since they may be unfamiliar with your school

Listening Sessions Agenda Builder

Use the guidance below to build an agenda for 30- to 45-minute sessions to conduct market listening from individual families and/or groups of families.

1

Context Setting

▶ Thank participants for participating

- Scripting: *Thank you for being here today for our conversation. We know your time is limited, so we appreciate you sharing it with us today.*

▶ Share with participants why they are here and how the information they share will be used

- Scripting: *Our school leadership is working to gain a better understanding of what families in our market want to accomplish, problems they want to solve, and needs they want to satisfy, in relation to school. We will use information you share with us about these three areas to help ensure our school's offerings are relevant to our families.*

▶ Assure confidentiality and creating a safe space

- Scripting: *Your confidentiality is important to us. Any identifying information that you share with us will only be shared with the senior leadership team. If we share larger findings from these conversations with the school community, information shared will not be identifiable. Does anyone have any questions or concerns about how this information will be shared?*

▶ Address incentives, if applicable

2

Introductions

▶ Introduce yourself and your notetaker

- Scripting: *My name and role is _____, and I will be guiding the conversation today. We also have _____, who is here to take notes. Please let either of us know if we can do anything to make this conversation more comfortable or useful for you.*

▶ Ask participants to introduce themselves

▶ Use optional icebreaker questions if desired

- Scripting:
 - *Please share one word that comes to mind when you think about your experience as a family member at the school: this word can be positive, negative, or neutral.*
 - *Please share one word or phrase that comes to mind when you think about what you want from a school for your family.*

Sources: NCIEC, [The Art of Facilitating Focus Groups](#), 2011. , McNamara, Carson, [Basics of Focus Groups](#), 2006; OMNI, [Toolkit for Facilitation Focus Groups](#), Accessed April 2022; [United Nations University Press](#). EAB interviews and analysis.

Listening Sessions Agenda Builder (cont.)

3

Ground Rules

▶ Provide rules for the conversation

- Scripting: *We do have a relatively full house today—so I'll note now that I might need to limit comments and direct us to move along in our agenda. I want to ensure we address all our focus areas for today and give all participants an opportunity to speak.*

▶ Ask participants to honor each other's privacy

- Scripting: *We ask that what is shared in this room stays in this room, and that you not share information that other families disclose during this conversation.*

4

Questions

▶ Prioritize asking questions that are most relevant to the information you need to understand your families' jobs, pains, and gains

- See **pp. 27-28** for the questions to use for market listening sessions
- Adjust questions as needed as you hold more market listening sessions

5

Additional Comments

▶ Time permitting, ask participants if there's anything else they'd like to share

- This provides an opportunity to uncover additional details that the facilitator may have overlooked. This also shows participants that the conversation is focused on supporting their needs and gives them some ownership over the conversation.

6

Closing/Wrap Up

▶ Remind families how the information will be used and thank them again for participating

Listening Sessions Question Bank

Use (and adapt) the questions below to prepare for conversations with independent school families in your market.

Part 1: Explore Families' Jobs To Be Done

First, we want to hear from you about the desires your family has related to school.

- What needs does your family have in mind when choosing a school?
 - How would you rank those needs in terms of importance?
 - Why are those needs most important?
- When you're selecting a school for your family, what are your main decision criteria?
 - How would you rank those decision criteria in terms of importance?
 - Why is that decision criteria most important?

Next, I want to share a short list of tasks we think families want to accomplish through school [verbally share and show on a visual aid the jobs-to-be-done you want to test, based on your Customer Profile Prototype and/or conversations with families].

- Do you agree with these tasks?
- How would you order these based on importance? Why is that task the most important?
- In relation to schooling, are there any other tasks you want to accomplish, problems you want to solve, or needs you want to satisfy that we have not already discussed?

Note: Write down "jobs" on sticky notes or use another type of visual aid so families can see them to help them answer questions about pains and gains.

Part 2: Explore Families' Pains

Now, we'd like to move into asking you some questions about challenges or pain points that your family experiences when trying to accomplish these tasks related to schooling.

Essentially, we're trying to figure out what are the "bad things" (negative outcomes, risks, or obstacles) you are hoping to avoid.

- What are challenges that your family faces when trying to accomplish these tasks?
- What risks you are hoping to avoid by accomplishing these tasks?
- What negative social consequences does your family face if these tasks aren't accomplished?
- What negative outcomes are so important for your family to avoid that they serve as your main decision criteria when choosing a school?

Note: The notetaker should be writing down the "pains" on sticky notes or another type of visual aid for families to see. At the end of this section, summarize back the "pains" you heard from families to ensure you've understood correctly. Ask them to name which ones are the most extreme for them and why.

Listening Sessions Question Bank (cont.)

Part 3: Explore Families' Gains

Next, we'd like to move into asking you some questions about the positive outcomes and benefits that your family must have, expects, or desires to achieve through accomplishing these tasks.

- What practical positive outcomes or goals do you hope to achieve through accomplishing these tasks?
- What positive emotions do you hope to experience from accomplishing these tasks?
- What positive social benefits does your family expect to gain from accomplishing these tasks?
- What positive outcomes are so important for your family to achieve that they serve as your main decision criteria when choosing a school?

Note: The notetaker should write down the "gains" on a visual aid for families to see. At the end of this section, summarize back the "gains" you heard from families to ensure you've understood correctly. Ask them to name which ones are the most beneficial for them and why.

Tips for Using Interview Guide

- **Customize and add questions as needed**, but ensure the questions revolve around understanding your families' jobs, pains, and gains.
- **Ensure your questions are simple, free of jargon, and asked one at a time**, so as not to overwhelm families.
- **Avoid closed or yes/no questions** to ensure richer answers to questions.
- **Treat the interview guide as a resource to aid your interviews**, rather than explicit instructions that you must follow.
- **Ask follow-up questions, particularly "why" questions**, to aid you in understanding families' underlying motives.
- **Ask families to give you concrete examples to help you understand the actions they take**; what families say may not align with what they do.
- **Don't focus on the solutions** your school offers to address jobs, pains, and gains; instead, focus on simply learning about families' jobs, pains, and gains.
- **Practice your interview questions with your colleagues** before asking them to families to ensure they are clear and straightforward.



Logistical Notes for Families Outside of Your School

This question guide can also be used for market listening sessions with families outside your school.

Notetaking and Summary Guide

Use the following tips and guidance to create customer profiles and note key takeaways after each market listening session.

Before Each Session

► Prepare Details of the Session

- The notetaker should record the details of this session including the facilitator, notetaker, total number and names of participants, location, date and time, and session length.

► Discuss Notetaking Plan

- Facilitators should share the questions they plan to ask with the notetaker ahead of the session, and notetakers should list those questions on their note form in advance. However, they should also leave notetaking space for when the conversation goes 'off-script' to probe for more information, etc.
- Facilitators and notetakers should agree on notetaking preferences in advance. Things to consider:
 - Will there be a recording the notetaker can revisit for details later, if needed? If so, ensure participants are aware and have given their permission to be recorded.
 - Is the goal of these notes to transcribe as closely as possible, or is the goal to highlight key takeaways live and note the essentials of the conversation?

► Prepare Visual Aid for Participants

- The notetaker and facilitator should discuss how they want to display families' jobs, pains, and gains (whiteboard, sticky notes, etc.) for families to see during the session.




After Each Session

► Discuss Key Findings Together

- The facilitator and notetaker should take 10 minutes to debrief the identified jobs, pains, and gains, and any other key takeaways from each session.
- The facilitator and notetaker should discuss what could be improved for future sessions.

► Finalize Customer Profile and Key Takeaways

- Create a customer profile for each individual and group session to list all the jobs, pains, and gains that the family/families expressed. Use the Customer Profile template on **p. 30** for each session.
- On each customer profile, note 3-5 additional key takeaways, each summarized in one bolded sentence, with additional details as needed.
- Include specific examples, stories, or paraphrased quotes from participants when useful.

Customer Segment: _____ <i>Key aggregated demographic grouping</i>		
 Customer Pains	 Customer Jobs	 Customer Gains
<i>Write the pains from this session below:</i>	<i>Write the jobs from this session below:</i>	<i>Write the gains from this session below:</i>

eab.com

Customer Profile Analysis Guide

Follow the steps below to analyze the data from all your customer profiles and key insights gathered during the market listening sessions.



Display

Display all customer profiles from each individual family or group session on a large, empty space. As a reminder, use the Customer Profile template on **p. 30** for creating these customer profiles.



Synthesize

Locate and circle commonly occurring jobs, pains, and gains across all the profiles. Jobs, pains, and gains that are worded differently but convey a similar message should still be circled. To organize your data more easily, you may also consider adding the jobs, pains, and gains to an Excel document.



Prioritize

Narrow down your list to the most frequently occurring 2-3 jobs, 4-5 pains, and 4-5 gains. If you are struggling to identify which ones to prioritize, it may be a sign you need to conduct more market listening sessions or gather feedback from other senior leaders.






Create

Build a market-tested Customer Profile by adding the top jobs, pains, and gains to the Market-tested Customer Profile template on **p. 32**. Repeat for any additional market segments explored.

Logistical Notes for Families Outside of Your School and Other Segments

If you are also conducting market listening sessions with other identified customer segments outside of traditional independent school families or with families outside of your school, consider conducting the data analysis steps above separately, so you can easily notice any differences between segments or between families within and outside of your school.

Customer Segment: _____ <i>Key aggregated demographic grouping</i>		
 Customer Pains	 Customer Jobs	 Customer Gains
<i>Write the top 4-5 pains of this segment below:</i>	<i>Write the top 2-3 jobs of this segment below:</i>	<i>Write the top 4-5 gains of this segment below:</i>

Market Listening with Non-School Families Guide

Integrate the advice on this page to recruit families in your market for market listening sessions who do not currently attend your school.

► How to Advertise Sessions to Families Outside of Your School

Word-of-Mouth

- Ask community members to reach out to families in their networks to gauge interest in participating
- Provide community members with scripting or talking points to use that include the purpose of the conversations and how families can participate

Admissions Data and Connections

- Check with admissions to see if they have contact info for prospective families who may be interested in participating
- Ask admissions if they have advice on families who may be good candidates for market listening sessions

Social Media and Online Communities

- Explain why you are posting, share context, and explain who your target audience is
- Include a link in your post to a form to complete if interested in participating

► How to Encourage Families to Participate in the Sessions

Monetary Incentives

- Brainstorm an incentive you could provide, such as waiving your school's application fee or offering gift cards
- Mention this incentive in your outreach

Flexible Scheduling

- Consider offering virtual sessions to make scheduling easier for families
- Consider offering various dates and times so families can find an option that work well for them

Events Combination

- If admissions or another office is holding events for prospective families, see if you can join the event to conduct an input session
- Ask senior leaders about ideas for events that you could join

Additional Notes

- Regardless of method, ensure that families understand the purpose of the sessions
- Send reminders or ensure that your scheduling software sends automatic reminders to families about the conversations
- Use this session as an opportunity to start building relationships with the families
- Ensure all families have a consistent experience; questions may vary to some extent but follow the same overall agenda so that families are treated similarly
- Over-recruit families outside of your market; it is better to have too many families rather than not enough

Source: Memon, M. & Webber, E., [7 simple ways to recruit research participants](#), Maze, 2023; EAB interviews and analysis.



202-747-1000 | eab.com

 @eab  @eab_  @WeAreEAB  @eab.life

ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.