

START
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JULY

SCHOOL YEAR

✍ Most state fiscal years (FYs) begin July 1

✍ New FY purchase orders are released

ACTION ITEMS

✍ Complete marketing plan for coming year

✍ Begin implementing back-to-school campaigns

AUGUST

SCHOOL YEAR

✍ Schools open early in the South

ACTION ITEMS

✍ Ensure alignment with school open times

✍ Begin outbound marketing cautiously to avoid back-to-school rush



NOVEMBER

SCHOOL YEAR

✍ Schools are preparing for the holiday slow-down

ACTION ITEMS

✍ Make the first two weeks count, before the holidays begin to set in

OCTOBER

SCHOOL YEAR

✍ Federal FY begins October 1

✍ Schools are building budgets for May and June approvals

ACTION ITEMS

✍ This is a key month; make a big push in your marketing and sales campaigns

SEPTEMBER

SCHOOL YEAR

✍ Schools are looking at available budget dollars for the current and next FY

✍ Schools are evaluating priorities, goals, parameters and programs

ACTION ITEMS

✍ Implement aggressive marketing and sales outreach after mid-month

✍ Remember, you're always selling for two FYs

Planning to the School Budgeting Cycle



DECEMBER

SCHOOL YEAR

✍ Schools are typically quiet from mid-December until early January

ACTION ITEMS

✍ Evaluate the results from your fall marketing and sales campaigns; make appropriate adjustments for spring

JANUARY

SCHOOL YEAR

✍ Bad weather can cause school closings

✍ Education conferences begin

ACTION ITEMS

✍ Plan for schedule disruptions caused by inclement weather

✍ Begin big marketing and sales pushes for the middle of the month

FEBRUARY

SCHOOL YEAR

✍ Bad weather can still be an issue causing disruption

✍ Conferences continue

ACTION ITEMS

✍ Keep the selling pressure on

✍ Schedule and complete trials and product demos

APRIL

SCHOOL YEAR

✍ Many schools in the South close in May

ACTION ITEMS

✍ Reach out to contacts in the South with open proposals and get final decisions

✍ Push for purchases with end-of-year money

SCHOOL YEAR

✍ Districts are finalizing decision making for the next FY budget

✍ Testing month means lots of distraction and limited availability

ACTION ITEMS

✍ Begin to close sales for summer school programs, if applicable

MARCH



MAY

SCHOOL YEAR

✍ Schools in the South are beginning to close

ACTION ITEMS

✍ End-of-year money may be released; be prepared to act quickly

✍ Announce new programs for the fall and set up summer trials, if applicable

JUNE

SCHOOL YEAR

✍ School budgets are approved for the upcoming school year

ACTION ITEMS

✍ Follow up on sales and POs to be released in July

✍ Evaluate this year's efforts and begin planning for next year

✍ Align marketing with product development and new product releases

✍ Have all back-to-school campaigns planned and ready to implement

FINISH