

# PLANNING & TRACKING

A lot of details go into creating a great yearbook. Plan for success by following the steps below. If you have any questions, don't hesitate to reach out to your Yearbook Representative — we're here to help!

## STEP 1 | ESTABLISH A BUDGET & DETERMINE A SALES PRICE

Determine yearbook expenses and income. Some estimating may be required.

☐ **Determine expenses. These may include:**

- Yearbook quote from School Annual
- Photographer
- Yearbook staff
- Promotional Materials — posters, booth space or incentives (see the promotional materials School Annual offers on the next few pages)
- Miscellaneous — office supplies, postage, etc.

**Estimated total expenses:** \_\_\_\_\_

☐ **Identify available revenue sources. These may include:**

- Yearbook sales (see example below)
- Fundraising
- Advertisement sales (see examples on the following pages)
- Donations — PTA/PTO, school budget, friends of school

**Estimated total revenue:** \_\_\_\_\_

☐ **Establish a sales price.** Traditionally the largest source of income for a yearbook project. See example below.

- Determine a price that covers expenses but is not detrimental to sales
- Subtract the estimated total revenue from the estimated total expenses
- Divide the number above by the minimum number of books you expect to sell

**Estimated total expenses:** \_\_\_\_\_ minus (-) **Estimated total revenue:** \_\_\_\_\_ divided by **Minimum number of sold books:** \_\_\_\_\_

**Sales price of each book:** \_\_\_\_\_

### EXAMPLE

Estimated total expenses:	\$6,000
Other revenue:	\$2,250
Revenue from book sales:	\$3,750
Minimum number of books:	250
Sales price of each book:	\$15.00* each

\*You need to sell each yearbook for the base price of \$15.00. This price should be adjusted for changes in fundraising, budget, or the anticipated sale of ads. You may want to adjust this for various incentives or promotions that will increase sales over the expected number of books sold.

☐ **Decide if you want to tier the price of the yearbook.**

- To entice parents to purchase the yearbook earlier in the year, you could tier the price of the yearbook. For example, you could raise it by \$2 each quarter or by \$5 after winter break. Tiered pricing isn't for every school, so choose what is best for your school.

### EXAMPLE

Purchase early	\$10.00 per book
Purchase later in the year:	\$15.00 per book
Purchase at delivery:	\$20.00 per book

These numbers reflect the \$15.00 sale price from the example above.

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## STEP 2 | SET UP ONLINE SALES

Most parents are used to making purchases online, and the yearbook is no different. We have the capabilities for your parents to purchase the yearbook online, taking the money and check handling off your plate. Simply let your Yearbook Representative know the price of your yearbook and when you want to sell it. We will set you up with a link that your parents can visit directly.

### Benefits of online sales:

- Parents are used to paying for all sorts of products and activities online!
- Reduces the amount of cash and checks for you to handle.
- School Annual takes care of the payments and puts all money toward your school's yearbook bill.
- As part of the yearbook sale, you could give parents the option to "donate a book" to a less fortunate student who may not be able to purchase the book.

Be sure to offer a seamless, easy experience for the parents to purchase the yearbook. Whether this means offering online sales, as well as in person with cash or check, think of what is the best experience for your school.

## STEP 3 | CREATE A YEARBOOK SALES TIMELINE

Starting at the beginning of the school year is key. Parents rely on getting the information for all promotions, fundraisers and events within the first week of school. Send the yearbook order form home along with other information pieces the parents need to act on quickly. Yearbook order forms and other promotional materials are listed on the next few pages.

### ☐ Plan the times you're going to promote the sale of the yearbook. These may include:

- Back to School PTO/PTA meeting
- School registration day(s)
- Halloween
- Valentine's Day
- Delivery Day

Using tiered pricing can entice parents to purchase the yearbook earlier in the year. For example, the last spring yearbook push should have the price raised. Tiered pricing can be as small as a couple dollar jump from Back to School to the end of the year.

### ☐ Determine how you're going to advertise your sales. Some ideas include:

- **Email.** Parents are used to receiving communication via email, so be sure to use this medium to spread the word about sales.
- **Posters.** Display posters near doors and main hallways.
- **Order Forms.** Supply each child with an order form within appropriate timing of each sales push.
- **Stickers.** Sticker each child to notify parents to look in their child's backpack.
- **Social Media.** If your school has a Facebook or Twitter page, see if the admin could post about the yearbook sale a couple of times during your advertising push. If you are selling online, be sure to give them a link.

## STEP 4 | TRACK YEARBOOK SALES

Maintain accurate sales records by tracking yearbook sales and keeping your orders organized.

### Option 1: Keep your own records by creating a spreadsheet with the following:

- Student name
- Grade, teacher or homeroom
- Number of books ordered
- Amount due
- Amount paid
- Accessories ordered
- Personalization

### Option 2: School Annual Online Sales Tool

- For schools using our online sales tool, all sales will be populated into your yearbook website for you to track.

**If you are not using our online sales, we recommend using the Teacher Envelopes, found on the next page, for each homeroom.**

## STEP 5 | CONFIRM DELIVERY DATE

Confirm a delivery date with your representative by letting them know when you need your yearbooks delivered. This will allow you to get an accurate due date assigned for when to submit your yearbook pages.