

Strategic planning and educational marketing: An analysis of a technical school in São Paulo

Planejamento estratégico e marketing educacional: Análise de uma escola técnica paulista

Planificación estratégica y marketing educativo: Análisis de una escuela técnica paulista

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Abstract

This study analyzed, over eighteen months, the educational marketing practices developed by a technical school linked to the Centro Paula Souza, located in the interior of the state of São Paulo. The research, characterized as action research, articulated theoretical foundation and practical intervention, involving bibliographic research, document analysis, dialogue with managers, and the development of a strategic marketing plan. The central objective was to understand how institutional dissemination actions have been implemented and to propose strategies to increase the school's visibility and the number of candidates for the selection process (Vestibulinho). Elements such as the 4Ps of marketing, digital marketing, institutional lectures, and internal marketing were analyzed, in addition to the application of the 5W2H tool. The results indicate that, although there are relevant initiatives, there is a need for greater systematization and integration of actions. It is concluded that educational marketing can strengthen the institutional image and expand the social impact of the school.

Keywords: Technical school; Educational marketing; Action research.

Resumo

Este estudo analisou, ao longo de dezoito meses, as práticas de marketing educacional desenvolvidas por uma escola técnica vinculada ao Centro Paula Souza, localizada no interior do estado de São Paulo. A pesquisa, caracterizada como pesquisa-ação, articulou fundamentação teórica e intervenção prática, envolvendo levantamento bibliográfico, análise documental, diálogo com gestores e elaboração de um plano estratégico de marketing. O objetivo central foi compreender como as ações institucionais de divulgação vêm sendo implementadas e propor estratégias para ampliar a visibilidade da escola e o número de candidatos ao processo seletivo (Vestibulinho). Foram analisados elementos como os 4Ps do marketing, marketing digital, palestras institucionais e endomarketing, além da aplicação da ferramenta 5W2H. Os resultados indicam que, embora existam iniciativas relevantes, há necessidade de maior sistematização e integração das ações. Conclui-se que o marketing educacional pode fortalecer a imagem institucional e ampliar o impacto social da escola.

Palavras-chave: Escola técnica; Marketing educacional; Pesquisa-ação.

Resumen

Este estudio analizó, a lo largo de dieciocho meses, las prácticas de marketing educativo desarrolladas por una escuela técnica vinculada al Centro Paula Souza, ubicada en el interior del estado de São Paulo. La investigación, caracterizada como investigación-acción, articuló fundamentación teórica e intervención práctica, involucrando revisión bibliográfica, análisis documental, diálogo con gestores y elaboración de un plan estratégico de marketing. El objetivo central fue comprender cómo se han implementado las acciones institucionales de difusión y proponer estrategias para ampliar la visibilidad de la escuela y el número de candidatos al proceso selectivo (Vestibulinho). Se analizaron elementos como las 4P del marketing, el marketing digital, las charlas institucionales y el endomarketing, además de la aplicación de la herramienta 5W2H. Los resultados indican que, aunque existen iniciativas relevantes, es necesaria una mayor sistematización e integración de las acciones. Se concluye que el marketing educativo puede fortalecer la imagen institucional y ampliar el impacto social de la escuela.

Palabras clave: Escuela técnica; Marketing educativo; Investigación-acción.

1. Introduction

In general, marketing is seen as a field dedicated to the study of the market, whose objective is associated with understanding consumer behavior and offering products and services aligned with their demands. However, this understanding must go beyond the simplistic view of identifying preexisting needs, since marketing actively participates in the construction and induction of desires, directly influencing consumption patterns and forms of social behavior. This idea is consistent with what Brei, Rossi, and Evrard (2007) emphasize, as, according to the authors, marketing has, over time, constructed and organized discourses about needs and desires, indicating the centrality of these concepts in its methodological field. In fact, this centrality resulted from historical, social, and discursive processes, and not merely as a direct response to originally given needs.

Moreover, marketing establishes strategic links between the market and organizations, being responsible for promoting products and brands, as well as for maintaining and creating images, values, and symbolic meanings closely linked to consumption. Through marketing management, companies and institutions seek to strengthen their market presence and legitimize their products by resorting to various tools such as advertising, merchandising, and publicity, which play a central role in persuading consumers.

In addition, Murtiasih, Hermana, and Febriani (2021) highlight that marketing tools, such as advertising, play a fundamental role in building brand value. For these authors, marketing communication directly influences the public's perception of brand images. Thus, marketing communication management is one of the strategies used to strengthen perception, credibility, and symbolic connection between consumers and brands, significantly and legitimately contributing to organizations in competitive environments.

Marketing is also characterized by adopting interdisciplinary approaches, drawing on knowledge from areas such as psychology, sociology, philosophy, and mathematics. This integration of knowledge is used especially in analyzing behavior, forecasting trends, and enhancing persuasion strategies. Therefore, marketing not only responds to consumer needs but also contributes to shaping them, transforming socially constructed desires into apparent individual needs. From a critical perspective, this process raises ethical and social questions, particularly regarding the stimulation of excessive consumption, the standardization of lifestyles, and the commodification of human relationships, highlighting the need for reflection on the limits and responsibilities of marketing in contemporary society.

According to Sameen (2025), ethical practices in digital marketing, especially on social media, influence the relationship between consumers and brands. Furthermore, actions grounded in social responsibility and transparent communication significantly strengthen consumer trust and loyalty, demonstrating that ethics has become a strategic element in contemporary marketing.

Marketing can also be understood as a set of methods and techniques aimed at increasing and expanding sales volume through the analysis of four central factors: price, communication, distribution, and product. Thus, sales development and growth assume a predominant role within marketing strategies.

According to Kotler (2002), customer and consumer needs are understood through five different categories that guide organizational strategies in the market. The first refers to real needs, that is, what customers actually seek when acquiring a certain product or service. The second relates to unstated needs, corresponding to expectations and desires that consumers have but do not always express explicitly. The third category involves stated needs, that is, demands verbally expressed by customers that directly influence their purchasing decisions. The fourth includes needs for something more, representing additional desires that consumers would like to have and that may add value to the offering. The fifth, secret needs, correspond to expectations that go beyond what is anticipated and that consumers themselves often cannot clearly identify.

Given these perspectives and this scenario, it is evident that a good marketing plan must seek to understand and address all these dimensions in order to strengthen a brand's or company's competitiveness, adding value and ensuring the viability of the company or product in an increasingly dynamic and competitive market.

With the intense expansion of private, federal, military, and technical educational institutions, these organizations began to stand out in relation to state schools, especially regarding educational quality indicators associated with performance in the National High School Examination (ENEM) and access to higher education. This led to high demand for such institutions, resulting in greater competitiveness in the educational sector, where the target audience—students and their guardians—began seeking institutions that met their expectations and desires. In this context, educational institutions also recognized the need to implement effective strategies not only in terms of teaching quality but also in promoting school actions, with the aim of preventing school dropout and attracting new students, thereby strengthening their image and consolidating their position in an increasingly competitive educational market.

In this scenario, Oplatka and Hemsley-Brown (2004) emphasize that educational marketing should not be understood merely as advertising or as a means of student recruitment, but rather as a strategic process involving institutional planning, identity construction, communication with the community, and strengthening of the school's reputation. Furthermore, in highly competitive environments among educational institutions, marketing becomes one of the most essential tools for schools to understand their audience, define their positioning, and develop pedagogical proposals aligned with social needs.

Although marketing took time to become present in the educational context, it has come to exert significant influence in this sector. This insertion occurred due to globalization, internationalization, and the growing privatization of education, which brought profound changes to school organization and their representation in society.

These changes encouraged the adoption of marketing strategies aimed at attracting more students, communicating institutional proposals, and positioning schools competitively in the educational market. In public institutions, even without marketing professionals on staff, marketing actions are widely used to publicize school activities and practices, as well as to position the institution within its context.

In educational management, marketing strategies have come to be recognized as essential tools in institutional planning and in building clear organizational identities. Moreover, in the educational context, marketing plans must go beyond promoting courses or services, involving analyses of the target audience, different student profiles, institutional image construction, and the development of communication policies that highlight pedagogical and administrative differentiators. This perspective reflects the growing perception that efficient management and institutional visibility are decisive factors for maintaining and expanding the educational clientele.

Cobra and Braga (2004) add that marketing gained prominence in the educational context mainly in the private sector, where increasingly intense competition and diverse pedagogical proposals created a need for differentiation and promotion. Cezar (2019) also highlights that marketing is not present only in the private sector but has recently become very present in public services as well, promoting closer relationships between the population and government agencies, potentially leading to improvements in services provided to society.

Rotta et al. (2016) further state that in public services and educational marketing contexts, communication practices must be accessible and understandable, using language that reaches all citizens regardless of their educational background, thus emphasizing the need to use multiple communication channels.

Pereira and Da Silva (2024) point out that in this scenario, digital marketing has consolidated itself as one of the most strategic and powerful tools for engaging the population in relation to institutional demands, including education, public services, and corporate communication. Digital platforms offer real-time interaction, allowing citizens, students, and clients to

express opinions, report issues, suggest improvements, and participate more directly and actively in decision-making processes. This connection enables more open and continuous dialogue channels, breaking traditional barriers between institutions and users and promoting more transparent and responsive communication.

Furthermore, the use of digital marketing makes it possible to map public demands, identify user needs, and monitor social behavior trends. Tools such as social media, applications, newsletters, and online forums allow for instant feedback collection and quick adjustments in the services and products offered. Thus, digital marketing goes beyond promotion or dissemination, acting as an instrument of active listening and co-creation, stimulating civic participation and community engagement.

Additionally, digital platforms create opportunities for the population to monitor decisions, participate in public consultations, oversee actions, and contribute to the continuous improvement of services and policies. In this way, digital marketing not only expands interaction and citizen protagonism but also strengthens trust in institutions, promoting a culture of participation, accountability, and collaborative innovation.

According to Kotler and Fox (1994), schools, even public ones, must establish complete and continuous relationships with their audience—that is, with the community in which they operate—capturing signals, desires, and expectations from that community and promoting adjustments and innovations that strengthen relations between the school and society. Listening, analyzing, and acting based on the information obtained enables the institution to become more responsive, efficient, and aligned with the real demands of its students and other stakeholders.

Therefore, for schools to achieve a deep level of social integration, it is necessary for educational agents to adopt more proactive and sensitive attitudes toward the needs of their audience, promoting management oriented toward dialogue and constant adaptation.

Over the course of eighteen months, a study group dedicated itself to analyzing the theoretical and practical foundations of marketing, as well as understanding its relevance to the educational context and to educational institutions, especially technical schools in the State of São Paulo (Etecs). At the same time, the group investigated the marketing practices adopted by one of these technical schools, seeking to understand its limits, potentialities, and challenges.

The central objective was to understand how institutional dissemination actions have been implemented and to propose strategies to increase the school's visibility and the number of candidates for the selection process (Vestibulinho).

2. Methodological Path

A mixed-methods research approach was used, partly based on action research, partly on case studies, and partly on experience reports, employing a qualitative approach and reflexive (Pereira et al., 2018; Barros, 2024; Risemberg et al., 2026).

This research was conducted over eighteen consecutive months and carried out by a group of researchers with higher education degrees in different fields of knowledge, namely: International Relations, Law, Marketing, Educational Sciences, Mathematics, and Administration. However, despite this diversity in academic backgrounds, all members hold technical training in Administration. The study was also supervised by a researcher in the field of Administration and co-supervised by a researcher in the field of Marketing.

The project activities were organized and executed in three major stages, each lasting approximately six months. In the first stage, a bibliographic review was conducted through searches in the CAPES Journal Portal, with the objective of building a consistent theoretical foundation regarding the use of marketing in the school context and its influence on educational institutions. The main references in this stage included the principles of Marketing Management, strategic

marketing planning, as well as studies on marketing applied to the school context, highlighting especially its relevance and visibility in the contemporary setting.

In the second stage, after completing the search, analysis, and consolidation of the theoretical framework, the group analyzed documents provided by the administrators of the field school and engaged in dialogues with these administrators in order to understand how the school has been using Marketing Management tools. The collected information was organized into comparative tables, allowing for a more detailed and critical analysis of the practices already in place at the school and the identification of improvements to be implemented in the short, medium, and long term.

In the third stage, based on the theoretical foundation and the analyzed documentary data, the group developed a marketing plan for the school, aiming to increase public awareness of the institution and enhance its visibility. The plan was presented to the administrators for possible implementation. It is noteworthy that, from both qualitative and quantitative perspectives, after five years—according to what was agreed upon with the management due to the plan's implementation—the study may be resumed in order to verify whether progress has been achieved in relation to the proposed objectives.

Thus, this work highlights the importance of a marketing plan for educational institutions, in addition to proposing actions that may contribute to strengthening institutional indicators and enhancing the local community's understanding of the school's social role, thereby fostering its continuous improvement.

Therefore, this research is characterized as action research. According to Engel (2000), action research presents a methodological approach that inseparably articulates the processes of scientific investigation and intervention in the reality it seeks to analyze. In this type of research, researchers do not assume an external or neutral position in relation to the object of study or the investigated field; rather, they act collaboratively with participants, seeking to understand the identified problems while simultaneously promoting transformations within that context. It is, therefore, a dynamic and continuous process in which knowledge production occurs through critical reflection on practice.

Furthermore, as indicated by Bagnara and Fensterseifer (2019), within the school environment, action research is extremely relevant and appropriate, as it strengthens the active participation of teachers, students, administrators, and the entire community in identifying problems, planning actions, implementing strategies, and evaluating results.

Thus, this cyclical movement—encompassing planning, action, observation, and reflection—contributes not only to improving pedagogical practices and institutional conditions but also to developing agents who are more committed to enhancing communication processes and educational management. In this way, action research enables the construction of contextualized, relevant, and socially engaged knowledge, directly aligning academic investigation with educational marketing practices and concrete action within educational institutions.

3. Results and Discussions

Currently, the adoption of marketing plans, both in private and public institutions, has become one of the central elements of organizational management and, therefore, the subject of broad discussion and analysis. The development of an effective institutional marketing plan represents one of the greatest challenges for organizations, since the perceptions and positioning of the institution in relation to its target audience exert significant influence on its visibility, sustainability, and competitiveness.

In this context, it is evident that institutional marketing planning requires a careful analysis of numerous factors, both internal and external. For this reason, three strategic characteristics of the field school in this study were selected to support the development of the proposed plan, namely.

3.1 Objective

Through its institutional marketing strategies, the school must identify and minimize the barriers that have hindered meeting the demands of its target audience, as well as establish clearly defined objectives and goals.

Admission to the school occurs through a selection process known as the “Vestibulinho.” Therefore, when promoting the actions developed by the institution, the central objective is to increase the number of candidates registering for this selection process, thereby enabling the formation of classes and the full occupancy of the available seats.

At the same time, after the selection process has taken place, the school should focus its efforts on consolidating a positive institutional image, strengthening its reputation and recognition as one of the leading educational institutions at the regional level—an aspect that has been progressively achieved.

Thus, the main objective is to increase the number of candidates registered for the Vestibulinho through effective institutional marketing strategies, ensuring the full occupancy of the offered places and reinforcing the school’s image as a regional educational reference. In this context, Soares and Da Silva (2019) emphasize that, in order to achieve goals related to attracting and retaining students in an increasingly competitive educational market, educational marketing must have clear objectives supported by precise and effective actions.

3.2 Environment

The school’s organizational environment must be strategically structured through the implementation of effective and integrated communication platforms. It is essential to align institutional projects with digital marketing actions, especially those linked to the school’s official website.

In this context, internal marketing (endomarketing) should also be highlighted, understood as a set of actions directed toward the internal audience—students, teachers, the management team, and other staff members—with the aim of strengthening collective engagement. Informal communication, known as word-of-mouth marketing, stands out as one of the most relevant elements in a marketing strategy, since positive experiences tend to be shared, while negative perceptions often spread even more widely.

Thus, the institutional environment should encourage students and staff to become promoters of an image associated not only with visibility, but also with quality, a sense of belonging, and institutional pride.

Pavlidou and Efstathiades (2021) emphasize that internal communication is an essential component of marketing strategies in public schools, as it facilitates the flow of information, strengthens engagement within the school community, contributes to a positive organizational culture, and directly impacts the institution’s image. Therefore, it should not be viewed merely as operational, but as strategic.

3.3 Available Resources

The institution should make use of integrated strategies, particularly those associated with the available communication resources. Among the actions already implemented, the distribution of printed materials—such as flyers in strategic locations throughout the city—stands out, in addition to advertisements in local and regional newspapers. There is also the periodic publication of institutional achievements and accomplishments, which contributes to increasing the school’s visibility and allows the external public to recognize its distinctive qualities.

It is further recommended to use other means of dissemination, such as posters, advertisements on radio stations, social media platforms, and other available channels, thereby expanding the reach of marketing actions and strengthening the institution’s positioning.

According to Roy & Misra (2024), it is extremely important to analyze the available resources in order to test the possibilities for implementing marketing actions, and especially to integrate them with technologies. Furthermore, the authors state that when analyzing integrated communication strategies — such as digital marketing, social media, student engagement, and other channels — these strategies influence students' choice of higher education institutions, highlighting the importance of coordinated actions to increase institutional visibility and attractiveness.

3.4 The 4Ps Analyzed for the Development of the Marketing Plan

According to Fiorenzo et al. (2025), the 4Ps of marketing are essential in planning marketing actions and are important elements to consider when developing plans.

Product: Quality programs (High School, Integrated High School, and Technical Education), a highly qualified teaching staff, and practical activities aligned with regional demands.

Price: A fee of R\$ 30.00 for registration in the selection process, intended to cover application costs. There are no tuition fees or enrollment fees.

Place: Strategic location, close to the commercial center and neighborhoods with easy access to public transportation.

Promotion: Promotion of the selection process in public spaces, distribution of flyers, use of sound cars (mobile loudspeaker advertising), and advertisements in newspapers.

3.5 Lectures

Although awareness of Centro Paula Souza has increased, many people still do not know the admission procedures and courses offered. Therefore, it is recommended that at least once a year, representatives of the school visit other regional institutions to present courses, infrastructure, and student achievements.

Suggested actions:

- a) Distribution of flyers;
- b) Raffle of prizes featuring the school's logo;
- c) Presentation of institutional slides;
- d) Explanation of mission, vision, values, and objectives;
- e) Justification of the lecture focusing on the positive impact on young people's lives.

In research conducted by Gralheiro (2015), the researcher demonstrated that live events, such as lectures, are gatherings that go beyond the mere promotion of products or services, functioning as strategic tools capable of generating memorable experiences, building trust, and consolidating the perception of brand authority in the market. Furthermore, the study highlights the relevance of in-person events in brand activation, showing how they are effectively integrated into organizations' marketing and communication strategies, promoting greater visibility, direct interaction with the audience, and relationship-building opportunities that enhance loyalty and corporate reputation.

3.6 Endomarketing

Internal marketing (endomarketing) is a strategic tool of internal communication aimed at aligning behaviors, disseminating information, and strengthening institutional bonds. In the school context, it can positively impact the organizational climate and productivity.

Its application involves valuing human capital, motivation, engagement, and bidirectional communication, contributing to continuous improvement, talent retention, and strengthening of the institutional image. It is a gradual and ongoing process that requires constant monitoring.

Endomarketing is a process that must involve continuous communication, appreciation, and engagement of the internal audience, such as teachers, coordinators, administrative staff, other employees, and students. When applied in the school context, it should contribute to consolidating the institution's mission, vision, and values, promoting greater cohesion among members of the school community. Its implementation should begin with strengthening internal communication, where management must establish clear, transparent, and bidirectional channels, allowing not only information dissemination but also active listening to professionals. Participatory pedagogical meetings, internal newsletters, bulletin boards, and spaces for dialogue encourage trust and reduce communication noise. When employees feel heard and informed, they tend to demonstrate greater commitment to institutional projects.

Another aspect associated with endomarketing is the appreciation of human capital, that is, recognizing good pedagogical practices, celebrating collective achievements, and encouraging professional development. These actions strengthen the sense of belonging. Investing in continuous training, encouraging experience sharing, and supporting innovative initiatives demonstrate that the institution values its professionals, which directly impacts motivation and the quality of work performed.

Furthermore, endomarketing fosters the development of an organizational culture based on respect, cooperation, and constant feedback. Institutional evaluations involving participation and individual monitoring also contribute to continuous improvement and strengthening of internal bonds. As a result, improvements in the organizational climate, greater talent retention, and strengthening of the institutional image can be observed. Therefore, in the school environment, endomarketing is one of the most essential strategic tools for promoting engagement, educational quality, and institutional sustainability.

In addition, Estevam et al. (2024) highlight that endomarketing in the school context has strategic importance, particularly in improving internal communication, strengthening the sense of belonging among employees, and creating more motivating environments for professionals within the institution. The study further notes that endomarketing is based on making internal communication more effective and teams more aligned with the school's values, consequently increasing the likelihood of student retention, as employees become more engaged and committed to the institution's mission, directly reflecting on the quality of educational services and the institutional image of the school.

3.7 Digital Marketing

Digital marketing is an essential strategic tool, considering the widespread presence of the population in digital environments. The school should systematically promote its actions on the institutional website and on social media platforms such as Instagram and Facebook, increasing visibility and strengthening relationships with the external public.

The dissemination of academic results, technical visits, student projects, and university admission approvals contributes to consolidating a strong institutional image based on credibility and educational excellence.

Digital marketing, according to Andrade et al. (2024), plays a fundamental role in the growth and competitiveness of organizations, since through digital strategies it is possible to reach segmented audiences, increase institutional visibility, and convert online searches into effective appointments. Furthermore, an active presence on platforms such as Instagram and Facebook strengthens the institutional image, conveys credibility, and creates a direct channel of communication with society. Social media also functions as a tool for education, service promotion, and the building of professional authority. Another relevant aspect is the ability to measure campaign results, allowing for strategic adjustments and greater efficiency in

investments. In this way, digital marketing not only expands the institution's reach but also contributes to audience loyalty and brand consolidation.

3.8 Reflections

Based on the analyses conducted, it is concluded that educational marketing has also become a strategic tool in the context of public schools, especially technical schools. In an increasingly competitive environment, it is essential to develop planned communication actions capable of highlighting pedagogical differentiators, strengthening the institutional image, and engaging with the community.

The development of the marketing plan proved to be both feasible and necessary to increase the school's visibility and the number of candidates in the selection process. The proposed actions—intensification of digital marketing, systematic lectures, appreciation of student achievements, and implementation of internal marketing—demonstrate that marketing practices can be aligned with the principles of public education without compromising its social mission.

Finally, the adoption of action research proved fundamental in linking academic investigation with practical intervention, ensuring that the knowledge produced was directly connected to the institution's real needs, strengthening its management and expanding its social impact in the region.

The results are also consistent with what Marques and Romão (2021) argue, since the published research investigates how public schools use communication, relationship-building, and institutional branding practices to strengthen their image within the community. The findings indicate that educational marketing can contribute to improving management, increasing the school's visibility, and bringing the institution closer to students and their families.

4. Final Considerations

Based on the results obtained in this study throughout the research process, it is evident that educational marketing, when strategically planned and aligned with the institutional mission, becomes an important instrument for strengthening public schools, especially those belonging to the network of Centro Paula Souza. By increasing the visibility of actions and pedagogical practices, as well as valuing student achievements and structuring more effective communication channels, the institution reinforces its identity and consolidates its position in the regional context, while maintaining its social and educational mission.

It is also noted that, although the school already carries out numerous dissemination initiatives on a daily basis, these actions remain fragmented and insufficiently systematized. The development of a more structured marketing plan—grounded in theoretical references and institutional context analysis—proves essential for integrating actions, defining clear goals, and optimizing available resources. Strategies such as strengthening digital marketing, conducting ongoing lectures in regional schools, and disseminating academic results represent promising paths for increasing the number of candidates in the selection process and enhancing the institution's image.

Furthermore, internal marketing (endomarketing), highlighted in this study, emerges as a central element in consolidating a positive organizational culture. By investing in internal communication, valuing employees, and engaging students, the school enhances word-of-mouth marketing within its environment, transforming the community itself into a multiplier of a strong and coherent institutional image. This movement not only contributes to attracting new students but also strengthens the retention and sense of belonging of those already part of the institution.

Finally, this action research demonstrated the importance of linking theory and practice, as such integration ensures that the knowledge produced is directly connected to the real needs of the school. Moreover, the collaborative nature of the

study facilitated the development of viable and contextually appropriate proposals, reinforcing that educational marketing—when understood as part of school management—can significantly contribute to continuous institutional improvement and to the expansion of its social impact within the community it serves.

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