Education
Advisory
Board

COE Forum

# Reaching "Search and Shop" Students

- Adding Value in the Search Process
- Fostering Repeat Purchase Behavior
- Rewarding Word-of-Mouth Referrals
- Customer Relationship Management Implementation Toolkit

# COE Forum

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### TO ORDER VIA EAB.COM

Publications can be ordered at: **www.eab.com/coe**

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Please address your email to: **researchedu@advisory.com** with "COE Forum 'Search and Shop' Request" in the subject line or reach out to your Dedicated Advisor.

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## Publication Details

### COE Forum

**Reaching "Search and Shop" Students** (26974)

Breakthrough Practices for Creating Differentiated Value for Prospects
and Building Lifelong Learner Relationships

# Table of Contents

# About the COE Forum

## Serving Continuing, Professional, and Online Education Leaders

### Our Parent Firm: The Advisory Board Company

Founded in 1979 to serve hospitals and health systems, the Advisory Board Company is one of the nation's largest research and consulting firms serving nonprofit, mission-driven organizations.  With a staff of over 2,300 worldwide, including 1,150 in Washington, D.C., we serve executives at about 3,000 member organizations in more than two dozen countries, publishing 150 major studies and 15,400  customized research briefs yearly on progressive management practices.

### Our Broader Work in Higher Education: The Education Advisory Board

Encouraged by leaders of academic medical centers that our model and experience serving nonprofit institutions might prove valuable to colleges and universities, the Advisory Board launched our higher education practice in 2007. We are honored to report over 800 college and university executives now belong to one of our Education Advisory Board memberships.

### Research and Insights

#### Academic Affairs Forum

Strategy advice and research for provosts, deans, and other academic leaders on elevating performance in teaching, research, and academic governance

#### Business Affairs Forum

Research and support for college and university chief business officers in improving administrative efficiency and lowering costs

#### Student Affairs Forum

Research for student affairs executives on innovative practices for improving student engagement and perfecting the student experience

#### Community College Forum

Strategy advice and research for community college presidents on improving college finances and campus management, as well as partnering with four-year institutions

#### COE Forum

Breakthrough-practice research and market intelligence to help universities develop and grow continuing, professional, and online education programs.

#### Advancement Forum

Breakthrough-practice research and data analytics to help Advancement professionals maximize philanthropic giving and support institutional goals.

### Performance Technologies

#### University Spend Collaborative

Business intelligence, price comparison database, and consulting to assist chief procurement officers in reducing spend on purchased goods and services

#### Student Success Collaborative

Predictive modeling, degree tracking, and support to help institutions improve student retention and graduation success

# Unlimited Access to COE Forum Online Resources

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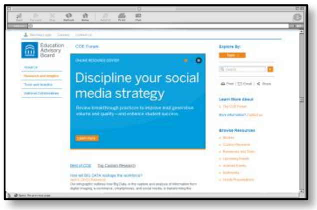

COE Forum members have full and unlimited access to the range of supplemental materials and implementation guidance on our website (http://www.eab.com/coe/).

Website resources include:

### Insight Centers

Instant information access for deans and directors trying to “get smart fast” on major issues, task forces and strategic planning implementation teams adapting national best practice to local mission and budgets, and staff leaders executing specific projects.

- Breakthrough Practice Studies
- Practice Implementation Tools
- Example: *Disciplining Social Media Strategy*, *Engaging Faculty in Online Education*

### Real-Time Employer Demand Analytics

COE Forum partnership with Burning Glass, a Boston-based leader in Human Capital data mining, with unique artificial intelligence tools that mine millions of online job postings for real-time intelligence on titles, skills, and educational requirements in demand across the nation

- Real-Time Labor Market Dashboards
- Future Fields Reports
- Custom Market Studies

### Over 100+ Custom Research Briefs

Wondering what questions other institutions are posing to the forum? Example projects include:

- *Considerations for Developing a Health Care MBA*
- *Intellectual Property Policies for Online Courses*
- *Models of Self-Service Student Advising*
- *Profiles of Distance Learning Fee Models*
- *Granting Academic Credit for Prior Learning*

### Webconference Registration and Archive

Register for upcoming sessions or listen to archives. Many of our members convene their teams to listen to recordings and brainstorm ideas. Some titles include:

- *New Roles and Skills Requirements in the Wake of Health Care Reform*
- *Engaging Faculty in Online Education: Innovative Budget and Instructional Design Support Models*
- *Retention Disciplines for Continuing and Online Learners*

# A Unique Approach

## Research Identifying Breakthrough Practices

### Beyond Averages: Over 100,000 Interviews Across the Firm

Education Advisory Board research focuses on answering one question: “How have successful organizations anywhere—whether in higher education or not—solved the pressing problems facing our members?” To that end, our analysts and consultants are dedicated to finding the most progressive and successful practices, never simply reporting what peer colleges and universities are doing. While relying on member surveys that solicit “best” practice ideas might be easier, this method cannot surface truly breakthrough ideas. Across the firm, our staff completes more than 100,000 in-depth interviews each year, probing for innovative new ideas, tactics, and strategies worthy of member time and attention.

### OUR RESEARCH PROCESS

**Literature Review and Expert Interviews**

A massive literature review and extensive interviews with all relevant Experts, in and out of sector, provide a deeper understanding of root cause problems and help identify potential new ideas.

**Exhaustive Screening for Breakthrough Practice**

Interviews are conducted with hundreds of colleges and universities to isolate the few dozen that have pioneered truly innovative practices and can show demonstrable results.

**In-depth Case Study Research**

Multi-day interviews and onsites are completed with these exemplar institutions to understand in detail how the practices work and the implementation requirements, benefits, and potential drawbacks.

**Rigorous Analysis and Recommendations**

The research team spends several months synthesizing the research and preparing detailed recommendations to guide members in how to implement the practices and strategies uncovered in the research.

# Advisors to Our Work

The Membership would like to express its deep gratitude to the individuals and organizations that shared their insights, analysis, and time with us. The research team would especially like to recognize the following individuals for being particularly generous with their time and expertise.

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# Top Lessons from the Study

### *The Challenge—The Rise of the "Search and Shop" Student*

1. **Even "Blue Ocean" Programs Fast Becoming Commodities:** Privately, COE leaders express concern that even niche programs risk losing market share as student choice expands and attention is harder to capture; competitors are growing online delivery and diversifying product offerings at the same time that traditional advertising methods become more expensive and less effective.

2. **Shifting Consumer Expectations Render Search Engine Victories Insufficient:** While a favorable search ranking or the right marketing mix may bring a prospect into the virtual door, today's student—no longer restrained by geography, intimately accustomed to comparing products online—is transporting a demanding "shopper mind-set" from their consumer lives into the educational search.

3. **The Paradox of Self-Service Websites:** It's now a necessity for COE units to provide all "must know" program details online, as prospects expect immediate answers when comparing schools; the downside is obviating the need to interact with the institution—COE units report stealth applicants on the rise, typically in at least the 30% to 40% range and as high as 85%.

4. **"Search and Shop" Culture at Odds with Need for Personalization**: In addition to lower admit and yield rates, stealth applicants are representative of a larger challenge: just as prospects' wider range of decision cycles, re-entry points, and motivations render "one size fits all" recruiting untenable, stealth shoppers present countless missed opportunities for providing differentiated personal interactions.

5. **Intermediary Websites Represent Even Greater Challenges on the Horizon**: Sites designed to perfect the matching of buyers and sellers (e.g., priceline.com, expedia.com) have skyrocketed in popularity in other industries; while still a fairly new concept in COE, thought leaders speculate that new aggregator websites will soon render it even more challenging for schools to differentiate and further encourage shopping behavior.

6. **For-Profits Prioritizing Speed-to-Conversation:** COE leaders worry that this prospective student impetus to "shop around" has further advantaged for-profits, which continue to ratchet up their recruiting machines (one secret shopper study demonstrated seven of the ten top for-profits now responding to inquiries in the first minute).

### *Increasing Conversions by Focusing on Highest-Return Relationships*

7. **Innovators Finding Breakthroughs in Relationship Marketing:** While most traditional universities cannot match for-profit speed, the good news is that being first matters less for many prospects than sustaining a relationship through their decision.

8. **Our Purpose with This Report:** Based on 200 interviews with experts and practitioners—both inside and outside higher education—this study will help members select among the high-ROI relationship-based strategies that COE innovators are deploying to stay ahead of new competitive threats in marketing and recruiting.

# Top Lessons from the Study (cont.)

9. **Three Disciplines for Reaching the "Search and Shop" Student:** Our research found that breakthrough practice organizations prioritize three disciplines, intended to encourage personalized interactions earlier in a prospects' decision process and to foster loyalty among those most likely to convert:

    a) **Adding Value in the Search Process:** Incentivize prospects to stay in touch over long decision cycles through content designed to help adult students feel reduced "risk" in their educational investment

    b) **Fostering Repeat Purchase Behavior:** Provide exclusive benefits for "repeat customers," mapping educational offerings to the skills needed for advancing lifelong learning and professional goals over time

    c) **Rewarding Word-of-Mouth Referrals:** Create incentives and easy-ask mechanisms for current and former students to pass quality leads

# Top Lessons from the Study (cont.)

### *How Do We Add Value in the Search Process?*
### *Creating Differentiated Messages and Services for Recruiting Career Changers*

10. **Typical Marketing Focuses Narrowly on "Purchase" Rather Than Lifecycle Choices:** Typical program marketing content is strong at providing information about the educational product (e.g., curriculum, price, start dates, faculty), but falls short at responding to prospects' many questions and anxieties about whether they're interested in a particular career.

## Breakthrough Practices

11. **Reduce Prospects' Risk of Career-Changing:** Design website content to help prospective students understand the end-to-end requirements of entering a new career, reducing the "search costs" for students by aggregating into one place all the information needed to weigh the cost, risks, and benefits of breaking into a new field (pgs 50-51).

12. **Provide Valuable Industry News as Excuse to Stay in Touch**: Encourage prospects to "opt in" to emails or social media updates, with content primarily focused on non-commercial industry news but also designed to keep the university top-of-mind through a potentially long decision cycle (pgs 50-51).

13. **Use Online Assessment as Springboard for Meaningful One-on-One Conversation:** Develop online career assessments for career-changers to evaluate whether a new field is the right fit, providing an opportunity and discussion points for the university to meaningfully converse on topics where the prospect needs life guidance (pg 52).

# Top Lessons from the Study (cont.)

***How Do We Foster Repeat Purchase Behavior?***
***Providing Exclusive Benefits and Defined Career Maps for "Repeat Customers"***

14. **High Giving Rates Represent Surprising Attachment by Professional Alumni:** Despite the misassumption that COE alumni—lacking the "fullness" of the traditional undergraduate experience—are less attached, some universities are finding graduate professional giving rates even higher than that of undergraduates, with breakthrough organizations leveraging professional alumni loyalty not only for fundraising, but also for repeat business and referrals.

15. **Difficult to Propose Right Next Step at the Right Time:** The primary challenge to capturing repeat customers is one of timing; most education institutions lack the advanced analytical capabilities—not to mention student career paths lack the predictability—to know when alumni will be ready for each next educational step (much less what these steps will be).

16. **Challenge to Stay "Top of Mind" for an Occasional Buyer:** Brand loyalty is easiest to build and sustain in industries where products are a recurring part of daily life and switching costs are high, neither of which is particularly true of continuing and professional education.

## Breakthrough Practices

17. **Design Career Advising Content to Stay in Touch and Suggest Next Steps:** Create alumni portals focused not only on obtaining employment, but also on succeeding and advancing in one's career; ensuring the portal is incorporated into daily life will keep the institution "top of mind" when alumni are ready for their next educational step, with taster courses embedded in the portal to aid with the decision (pgs 61-62).

18. **Recommend Courses Based on Peers with Similar Interests:** Incorporate "students like you" course recommendations on each course webpage, using a no-algorithm-needed combination of already-existing course groupings and enrollment data (pg 63).

19. **Provide Exclusive Benefits for Frequent Buyers:** Create loyalty programs that provide financial and other incentives (e.g., special workshops) for students to pull forward courses and complete certificates in compressed amount of time (pg 64).

20. **Develop "Stackable" Offerings:** Design stackable credentials (i.e., multiple certificates summing to a degree) to provide students with an interim sense of progress as they make headway toward a degree (pg 65).

21. **Work with Companies to Match Offerings to Career Paths:** Form long-term partnerships with key employers, mapping COE programs to the most common career paths, steering employees to the best-fit university programs for each subsequent educational need on the journey to the "corner office" (pg 66).

22. **Ask for the Estimated Time Frame to Follow Up:** Hold exit interviews with stop-outs and recent or soon-to-be graduates, asking for the approximate time frame (and permission) to re-approach them about returning to complete their degree or start the next one (pg 67).

# Top Lessons from the Study (cont.)

### *How Do We Reward Word-of-Mouth Referrals?*
### *Incentivizing Current and Former Students to Pass Quality Leads*

23. **Word-of-Mouth Already a Top Referral Source, Organically—What if We Actually Tried?** Many COE units are finding “word of mouth” to be a top factor in motivating inquiries and enrollments even without any real investments to date; breakthrough institutions are building upon what was once merely ad hoc, creating new incentives and follow-up mechanisms to increase enrollments through referrals.

## Breakthrough Practices

24. **Develop Easy-Ask Mechanisms for Course Testimonials:** Ask students to provide course ratings and testimonials when they’re especially receptive (e.g., just completed a course, submitting a grade request); make submission as easy as possible by embedding the request as a “pop up” on the website that the student is already on, with no extra navigation needed (pgs 74-75).

25. **Raise Referrers’ Social Capital by Providing Interesting or Useful Information to Forward to Friends:** Use “infotainment” (fun, personalized video; industry news) to encourage cold leads and current prospects to forward content to friends; the key is that the original recipient feels their reputation is boosted by sending enjoyable videos or emails to their network (pg 77).

26. **Use Physical Gifts to Provide Campus Feel for Online Students:** Mail a low-cost physical memento to congratulate online degree alumni, including transferrable next-course-free vouchers they can use for their next degree or as a “gift” to a friend (pgs 78-79).

27. **Select Dedicated Leads-Passing Alumni:** Recruit a committed corps of alumni who receive training and a small incentive to pass qualified leads to your institution, with follow-up from university staff (pgs 81-84).

28. **Provide Incentives for Most-Networked and Motivated Leads-Passers:** Develop a tiered structure with VIP benefits to incentivize the most-networked and motivated alumni referral scouts to pass more leads; share top referral success stories with larger group to provide aspirational role models and share best practices (pg 82).

Throughout our profiles of university breakthrough practices, this symbol will alert the reader to any relevant tools available in the Implementation Toolkit at the back of this book

# Top Lessons from the Study (cont.)

## Quick Wins and Long-Term Differentiators

Recognizing disparate available resources among institutions, and that many members must pursue excellence without more time, budget, or staff than they currently have, the COE Forum has distinguished Quick-Win practices (those tactics requiring minor investment in time or resources and that are more likely to achieve fast results) from Long-Term Differentiators (tactics that are potentially transformational, but that are more speculative and/or require larger investments in technology, expertise, or cultural change). For members unable to invest in Long-Term Differentiators immediately, we recommend that Quick Wins may help generate the resources needed to fund longer-term activities. We have arrayed our breakthrough practices according to the spectrum below.

**Quick Wins**

| Adding Value in the Search Process | Fostering Repeat Purchase Behavior | Rewarding Word-of-Mouth Referrals |
|---|---|---|
| • Encourage prospects to "opt in" to communications, with content primarily focused on non-commercial industry news, but also designed to keep the university top-of-mind through a long decision cycle (pgs 50-51)<br>• Design website content to help prospective students understand the end-to-end requirements of entering a new career (pgs 50-51)<br>• Develop online career assessments for career-changers to evaluate whether a new field is the right fit, providing an opportunity and discussion points for the university to meaningfully converse on topics where the prospect needs life guidance (pg 52) | • Incorporate "students like you" course recommendations on each course webpage, using a no-algorithm-needed combination of already-existing course groupings and enrollment data (pg 63)<br>• Design stackable credentials to provide students with an interim sense of progress as they make headway toward a degree (pg 65)<br>• Provide financial and other incentives (e.g., special workshops) for students to pull forward courses and complete certificates in compressed amount of time (pg 64)<br>• Hold exit interviews with stop-outs and recent or soon-to-be graduates, asking for an appropriate re-approach time frame (pg 67)<br>• Form long-term partnerships with key employers, mapping COE programs to the most common career paths, thereby helping employees on the journey to the "corner office" (pg 66)<br>• Create alumni portals that meet alumni's growing and changing career needs to stay "top of mind" when alumni are ready for their next educational step (pgs 61-62) | • Use "infotainment" to encourage cold leads and current prospects to forward content to friends; key is that original recipient feels reputation boosted by sending enjoyable videos or emails to their network (pg 77)<br>• Mail a low-cost physical memento to congratulate online degree alumni, including transferrable next-course-free vouchers they can use for their next degree or as a "gift" to a friend (pg 78-79)<br>• Ask students to provide course ratings and testimonials when they're especially receptive (e.g., just completed a course, submitting a grade request); make submission as easy as possible by embedding request as "pop up" on website student is already on, with no extra navigation needed (pgs 74-75)<br>• Recruit a committed corps of alumni who receive training and a small incentive to pass leads to your institution, with follow-up from university staff (pgs 81-84)<br>• Develop a tiered structure with VIP benefits to incentivize the most effective referral scouts and share their success to encourage the same among the larger group (pg 82) |

**Long-Term Differentiators**

# Member Implementation Guide

- Assessing Your Current Practice
- Supporting Members in Practice Implementation
- Navigating the Implementation Toolkit

# Assessing Your Current Practice

The following categories are designed to guide member evaluation of their current social media strategies. These categories should be used to spotlight tactics that map to institutional challenges.

| I. Adding Value in the Search Process | Yes | No |
|---|---|---|
| 1. Has your organization developed website content and communication plans that address prospects' critical questions and concerns surrounding the risks and opportunities associated with a potential career change? | ☐ | ☐ |
| 2. Do your recruiters use a "permission marketing" approach to prompt prospective students to opt into their social media communications, combining both programmatic information (e.g., events, deadlines) with non-sales-related, industry news? | ☐ | ☐ |
| 3. Has your organization developed program-specific content designed to stay in touch with prospects over a long decision cycle and to be pushed through different mediums (e.g., blogs, social media channels, e-newsletters)? | ☐ | ☐ |
| 4. Does your institution provide assessment questionnaires and other information to help prospective new students determine whether a new career change is right for them? | ☐ | ☐ |
| 5. Has your organization deployed a diagnostic or a similar vehicle for determining prospects' program-area interests and compatibility with various delivery models, expectations, concerns, and goals? | ☐ | ☐ |
| 6. Does your organization provide recruiters with content from prospects' diagnostic quizzes to facilitate richer follow-up conversations that focus on prospects' unique levers to enrollment? | ☐ | ☐ |
| 7. Has your organization determined the specific career resources that your target market is most likely to benefit from as opposed to providing generic, one-size-fits all resources that may seem too similar to those of your competitors? | ☐ | ☐ |
| 8. Can your recruiters speak to long-term professional resources to convince prospective students that your institution will support them in the future as they grow in their careers and encounter new challenges long after enrollment? | ☐ | ☐ |
| 9. Are free "trial courses" and webconferences tailored to address common sources of uncertainty for adult students, such as unfamiliarity with online delivery or a hesitancy to change careers? | ☐ | ☐ |
| ***If you answered "No" to any of the above questions, please turn to pg 45.*** | | |

| II. Fostering Repeat Purchase Behavior | Yes | No |
|---|---|---|
| 1. Does your organization use past enrollment data to identify the most frequently taken courses within a course cluster to drive students to additional courses taken by students like them? | ☐ | ☐ |
| 2. Does your organization provide "students like me" course recommendations on each individual course webpage to help students anticipate their next steps? | ☐ | ☐ |
| 3. Has your organization developed "stackable" certificates that sum to a degree and provide students with an interim sense of progress as they move toward a degree? | ☐ | ☐ |
| ***Continued on the next page*** | | |

# Assessing Your Current Practice (cont.)

| II. Fostering Repeat Purchase Behavior (cont.) | Yes | No |
|---|---|---|
| 4. Does your organization use financial incentives and other exclusive benefits designed to turn stand-alone course takers into certificate completers if they take a certain number of courses in a set period of time? | ☐ | ☐ |
| 5. Does your organization offer frequent course takers professional and social networking events as part of a membership-based club to help cement loyalty and therefore seed future repeat purchasing behavior? | ☐ | ☐ |
| 6. Does your organization use exit interviews to identify the preferred re-approach time frame for soon-to-be graduates who are interested in graduate school? | ☐ | ☐ |
| 7. Does your organization use exit interviews to identify the preferred re-approach time frame for stop-outs who envision returning to complete their program? | | |
| 8. Do your enrollment advisors receive automatic prompts reminding them to reach out to alumni who stated an interest in graduate school at the customized times provided by each alumnus/a? | ☐ | ☐ |
| 9. Has your organization worked with top employer partners to map portfolio offerings to career ladders, thereby creating a compelling reason for employees to return to your organization for future educational needs in support of career advancement? | ☐ | ☐ |
| 10. Does your organization stay close to alumni by deploying resources like an online portal that provides graduates with career tools that meet their growing and changing professional needs? | ☐ | ☐ |
| 11. Does your organization use alumni portals to push out graduate school “taster” content? | ☐ | ☐ |
| 12. Does your organization look for opportunities to stay close to recent undergraduate alumni through professional skill boot camps designed to help alumni secure employment? | ☐ | ☐ |

***If you answered “No” to any of the above questions, please turn to pg 57.***

| III. Rewarding Word-of-Mouth Referrals | Yes | No |
|---|---|---|
| 1. Does your organization send regular emails specifically designed to keep in touch with cold leads and encourage them to forward content, minimizing direct sales content and focusing instead on useful industry news? | ☐ | ☐ |
| 2. Has your organization developed any personalized videos or other content designed to not only nurture top prospects, but also encourage them to send videos to friends? | ☐ | ☐ |
| 3. Has your organization’s recruiting and marketing team systematically identified the most powerful moments of goodwill during a student’s relationship with your organization to leverage as opportunities to encourage word-of-mouth promotion? | ☐ | ☐ |
| 4. Does your organization use a small gift recognizing students’ accomplishment upon graduation coupled with transferrable next-course-free-vouchers to prime alumni to pay the gift forward and send friends and family back to school? | ☐ | ☐ |

***Continued on next page***

# Assessing Your Current Practice (cont.)

| III. Rewarding Word-of-Mouth Referrals (cont.) | Yes | No |
|---|---|---|
| 5. Does your organization rigorously collect course recommendations and ratings from course participants by soliciting contributions through a low-pain form that pops up when students are most likely to fill it out? | ☐ | ☐ |
| 6. Does your organization feed prospective students' needs for experiential recommendations from people like them by making course reviews and ratings public and tying them to course webpages? | ☐ | ☐ |
| 7. Does your organization use alumni as on-the-ground field recruiters and incent them to pass leads with small financial incentives? | ☐ | ☐ |
| 8. Does your organization erect barriers to entry for alumni leads passers to ensure that only committed and competent alumni participate? | ☐ | ☐ |
| 9. Does your organization's recruiting team provide alumni leads passers with training and talking points to ensure they are equipped to provide answers to commonly encountered questions? | ☐ | ☐ |
| 10. Has your organization provided highly effective leads passers with additional rewards, while also sharing their success to encourage others to reach for the same? | ☐ | ☐ |
| ***If you answered "No" to any of the above questions, please turn to pg 71.*** | | |

# Supporting Members in Practice Implementation

## Beyond This Publication

We see this publication as only the beginning of our work to assist members reaching today's challenging "search and shop" students. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with COE Forum members to decide which practices are most relevant for your organization, to accelerate consensus among key constituencies, and to save implementation time.

For additional information about any of the services below—or for an electronic version of this publication—please visit our website (eab.com/coe), email your organization's dedicated advisor, or email researchedu@advisory.com with "COE Forum 'Search and Shop' Request" in the subject line.

### Implementation Road Maps and Tools

Throughout breakthrough practice profiles, this symbol will alert you to any corresponding tools and templates available in the "Implementation Toolkit" at the back of this book. These tools, along with additional online resources, are also available on our website.

### Recorded and Private-Label Webconference Sessions

Our website includes recordings of four hour-long webconferences walking through the practices highlighted in this publication. Many of our members convene their teams to listen to recordings together; COE Forum experts are also available to conduct private webconferences with your team.

### Unlimited Expert Troubleshooting

Members may contact the consultants and analysts who worked on any report to discuss the research, troubleshoot obstacles to implementation, or run deep on unique issues. Our staff conducts nearly a thousand telephone consultations every year.

### Facilitated Onsite Sessions

Our experts regularly visit campuses to lead half-day to day-long sessions focused on highlighting key insights for senior leaders or helping internal project teams select the most relevant practices and determine next steps.

# Navigating the Implementation Toolkit

To accelerate member implementation of marketing and recruiting breakthroughs, we developed a customer relationship management toolkit that can be found at the end of this publication. The collection includes tools that help organizations enhance their prospective student relationships irrespective of whether they are using a CRM system, as well as tools for members who are looking to accelerate the implementation—and/or increase the adoption—of CRM systems. The following two tables are designed to guide readers to the tools they will find most useful given their specific goals and challenges. First, identify the challenge area on the x axis that is most salient, then track down the columns for the tools that will likely be most helpful.

| **Creating Targeted Prospect Communications** | Crafting Communication Plans | Maximizing Recruiter Time | Involving Staff in Content Creation | Encouraging Word-of-Mouth Referrals | Customizing Communications | Segmenting Prospects | Optimizing Phone Touches | Optimizing Email Touches |
|---|---|---|---|---|---|---|---|---|
| Tool #1: Buying Cycle-Based Lead Nurturing Map | | ✓ | | | | | | |
| Tool #2: Guidelines for When to Call a Prospect | ✓ | ✓ | | | | | ✓ | |
| Tool #3: Communications Plan Builder | ✓ | ✓ | | | | | | |
| Tool #4: Lead-Prioritizing Phone Script | ✓ | ✓ | | | | | ✓ | |
| Tool #5: Personalized Email Builder and Templates | ✓ | | ✓ | | | | | ✓ |
| Tool #6: Faculty Assistance Recruitment Campaign | | | ✓ | | | | | |
| Tool #7: Tell-a-Friend Email Campaigns Tool | | | | ✓ | | | | ✓ |
| Tool #8: Corporate Alumni Club Builder | | | | ✓ | | | | |
| Tool #9: Alumni Leads Passer Sign-Up Form | | | | ✓ | | | | |
| Tool #10: See-You-Again Sample Message for Completers | | | | ✓ | | | | ✓ |
| Tool #11: Course Star-Rating Feedback Form | | | | ✓ | | | | |
| Tool #12: Follow-Up Conversation Scripting Tool | ✓ | | | | ✓ | | ✓ | |
| Tool #13: Inquiry Form Builder | ✓ | | | | ✓ | | | |
| Tool #14: Quick Poll Questions Guide | ✓ | | | | ✓ | | | |
| Tool #15: Cold Lead Email Preference Template | ✓ | | | | ✓ | | | ✓ |
| Tool #16: Segmentation Briefing Sheet: Demographics | ✓ | | | | | ✓ | | |
| Tool #17: Segmentation Briefing Sheet: Motivations | ✓ | | | | | ✓ | | |
| Tool #18: Segmentation Briefing Sheet: Actions Taken | ✓ | | | | | ✓ | | |

# Navigating the Implementation Toolkit (cont.)

| Maximizing CRM Software Benefits | Encouraging Utilization | Mapping CRM to Business Needs | Selecting a CRM Vendor | Change Management | CRM Staff Roles | Assessing and Correcting CRM | Estimating Resource Allocation |
|---|---|---|---|---|---|---|---|
| Tool #19: CRM Business Case Template | | ✓ | | | | | ✓ |
| Tool #20: Stakeholder Process Improvement Forms | ✓ | ✓ | | | | | |
| Tool #21: Guide to Understanding Your CRM Needs | ✓ | ✓ | | | | | ✓ |
| Tool #22: Example CRM Implementation Timeline | | ✓ | | | | | ✓ |
| Tool #23: RFP Creation Template | | | ✓ | | | | |
| Tool #24: Higher Education CRM Vendor Primer | | | ✓ | | | | |
| Tool #25: Vendor Selection Scorecard | | | ✓ | | | | |
| Tool #26: Vendor Selection Committee Guidelines | | | ✓ | | | | |
| Tool #27: CRM Resource Intensity Comparison Chart | | | ✓ | | | | ✓ |
| Tool #28: CRM Risk Point Map | | | | ✓ | | | |
| Tool #29: End-User Memorandum of Understanding Builder | ✓ | | | ✓ | | | |
| Tool #30: Lessons from Industry Discussion Guide | | | | ✓ | | | |
| Tool #31: CRM Leadership Structure Guide | | | | ✓ | | | ✓ |
| Tool #32: Profile of a CRM Rotation Program | ✓ | | | ✓ | | | |
| Tool #33: CRM Training Curriculum Outline | ✓ | | | | ✓ | | |
| Tool #34: Sample CRM Specialist Position Descriptions | | | | | ✓ | | |
| Tool #35: Guide to CRM Specialist Selection | | | | | ✓ | | |
| Tool #36: CRM Check-Up Guide | | | | | | ✓ | |
| Tool #37: CRM KPI Builder | | | | | | ✓ | |

# The Challenge

## Reaching the “Search and Shop” Student

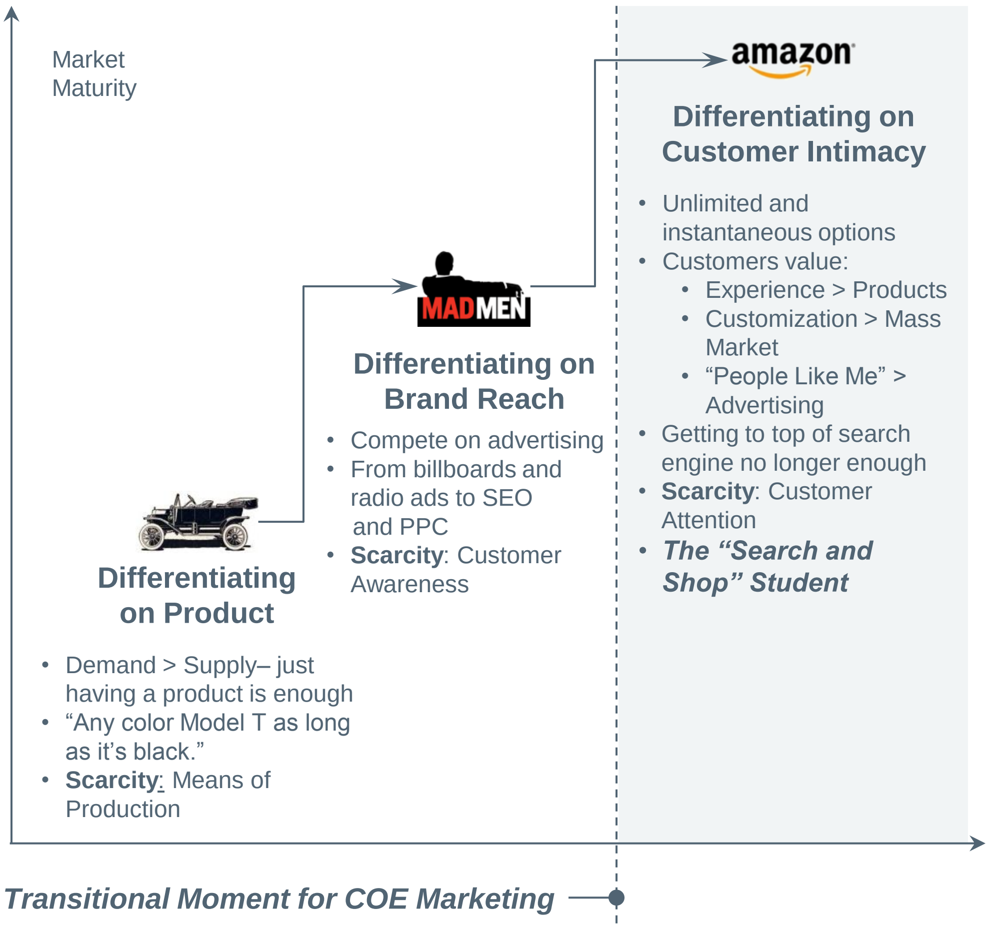
# Changing Rules of the Game

Continuing, professional, and online education marketing experts are experiencing a seismic shift in their approach to student acquisition. The days when demand exceeded supply and a product alone was enough to distinguish an institution are long gone, and even mastering "brand reach" disciplines (e.g., SEO) is no longer sufficient in a commodified market.

Today's COE marketers and recruiters face a prospective student landscape that is fundamentally different from that of their predecessors': with more educational options than ever, a wealth of information at their fingertips, and the online-shopping savvy needed to navigate it all, prospective students are demanding that institutions speak to their specific needs and expectations.

Adapting to the changing rules of the student-acquisition game has been a difficult climb, and meeting the demands of the "Search and Shop" student with limited marketing and recruiting resources is proving to be the most challenging summit yet.

## A Slightly Oversimplified History of Marketing in One Slide



**Differentiating on Product**

- Demand > Supply– just having a product is enough
- "Any color Model T as long as it's black."
- **Scarcity**: Means of Production

**Differentiating on Brand Reach**

- Compete on advertising
- From billboards and radio ads to SEO and PPC
- **Scarcity**: Customer Awareness

**Differentiating on Customer Intimacy**

- Unlimited and instantaneous options
- Customers value:
  - Experience > Products
  - Customization > Mass Market
  - "People Like Me" > Advertising
- Getting to top of search engine no longer enough
- **Scarcity**: Customer Attention
- ***The "Search and Shop" Student***

***Transitional Moment for COE Marketing***

**Running Really Hard, but Still Falling Behind**

> "We have great individuals on our marketing team, but it feels like all our time is consumed playing catch-up. I worry that we're perfecting the marketing strategy of 1999 at the precise moment the world has moved onto something else. How are leading COE units adapting to new consumer behaviors?"
>
> *Vice Provost, Public University*

For more information on developing customized communications strategies, see Tools #1, 3, 5, 16, 17, and 18

Source: Education Advisory Board interviews and analysis.

# By, For, and Of the Consumer

The end state of a completely consumer-centric educational search process is a one-stop shop that makes customizing, comparing, and sharing options far more convenient than is currently the case in higher education, one of the few industries yet to be disrupted by intermediary websites (e.g., Priceline.com and Expedia.com). Noodle, a start-up company founded by John Katzman (also founder of 2U and the Princeton Review) aims to be *the* place to go for educational search. COE experts are forced to consider the broader implications of consumer resources like Noodle that offer a range of functionalities and that may soon render institutions’ current marketing and recruiting strategies obsolete.

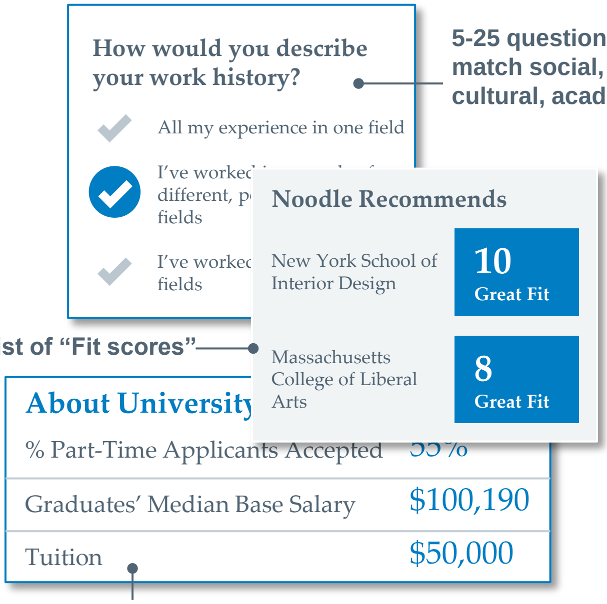
## Noodle Education Raises $3 Million in VC Funding to Perfect Educational Search Process

### One-Stop-Shop Incorporating Best Features from Popular Sites

**noodle**

| | |
|---|---|
| amazon | Personalized homepage based on previous activity |
| ORBITZ | Easy price comparisons |
| facebook | Sharing with family and friends |
| tripadvisor | Read comments and reviews by others |
| Rotten Tomatoes | Aggregating information throughout web |
| NETFLIX | Matching based on questions answered |

### Customized School Recommendations from Noodle’s “Wizard”



How would you describe your work history?

✓ All my experience in one field

☑ I’ve worked different, p fields

✓ I’ve worked fields

Noodle Recommends

| | |
|---|---|
| New York School of Interior Design | 10 Great Fit |
| Massachusetts College of Liberal Arts | 8 Great Fit |

About University

| | |
|---|---|
| % Part-Time Applicants Accepted | 55% |
| Graduates’ Median Base Salary | $100,190 |
| Tuition | $50,000 |

**5-25 questions to match social, cultural, academic fit**

**List of “Fit scores”**

**Aggregated info**

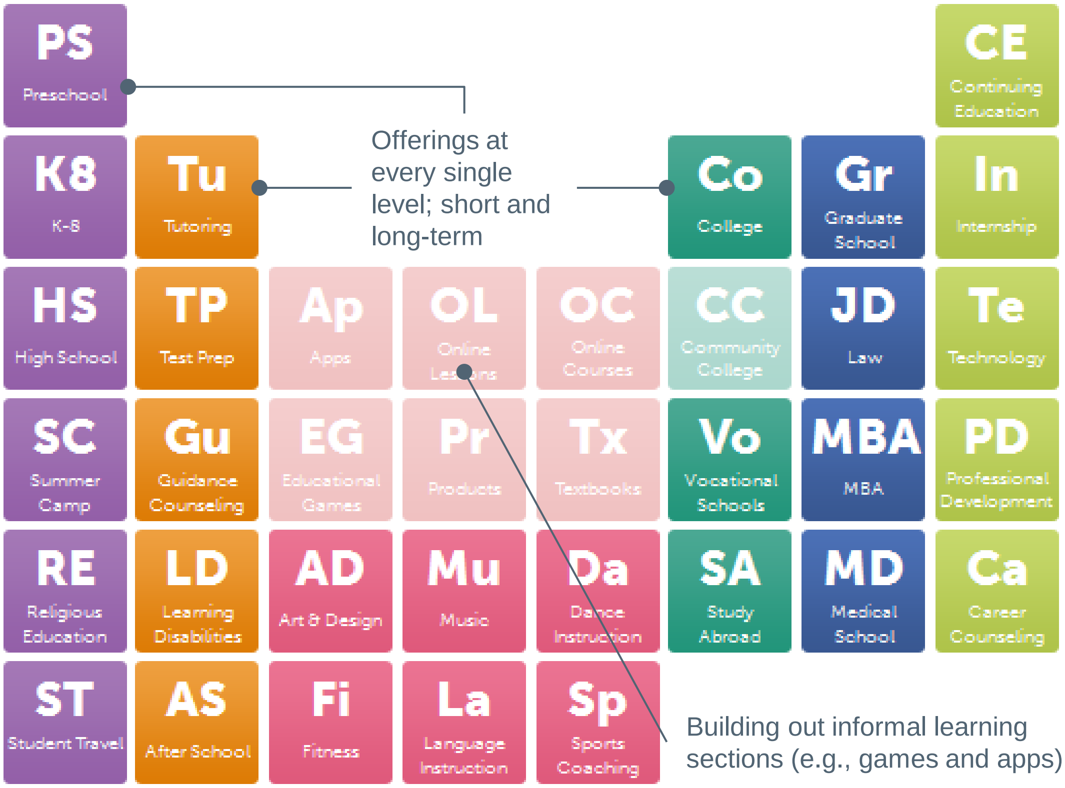
Source: Education Advisory Board interviews and analysis.

# Aggregating Cradle-to-Career Options

Ultimately, Noodle aims to become consumers’ go-to resource for information about cradle-to-career educational needs, from preschool to graduate school, to lifelong learning. Although it is still too soon to tell whether Noodle will become a household name, it is likely that either Noodle or a similar company will begin to affect higher education in the same way that sites such as Expedia and Kayak have impacted the airline industry.

Innovative companies like Noodle foretell a future when prospective students, inundated with information, turn to aggregator resources that tame and organize that information. With this future looming on the horizon, marketing professionals are asking, “How will my institution stand out in a world where advertising is by, for, and of the consumers without the producers needing to be as involved?”

## Noodle’s Periodic Table of Education



Offerings at every single level; short and long-term

Building out informal learning sections (e.g., games and apps)

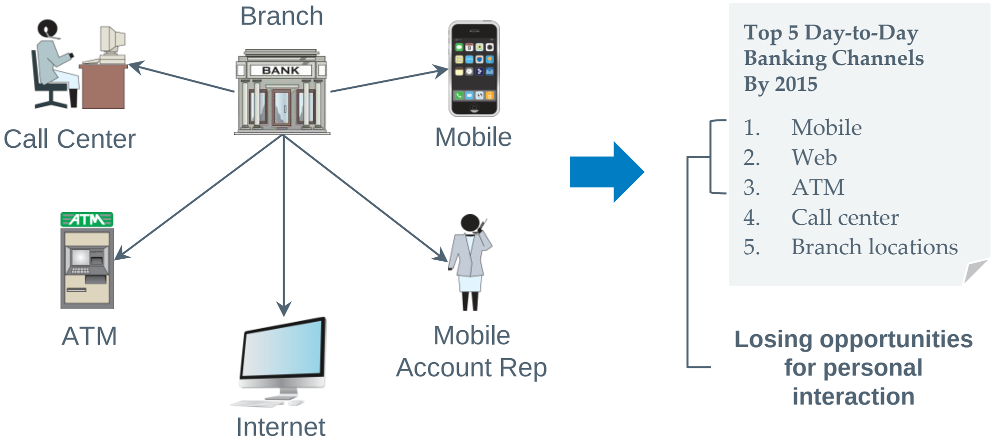
For one way of gathering additional information about prospects that can be used to customize communications and make better recommendations, see Tool #14: Quick Poll Questions Guide

Source: Education Advisory Board interviews and analysis; Noodle, available at: http://www.noodle.org/, accessed on Oct 15, 2012

# A Surprisingly Kindred Spirit—Financial Services

The banking industry offers surprisingly helpful lessons when trying to understand how best to establish relationships with “Search and Shop” customers. Similar to colleges and universities, the financial services industry is faced with a customer base that is increasingly bypassing face-to-face interaction—where banks traditionally cemented loyalty and bolstered sales—in favor of more convenient electronic channels. Also comparable to the education space, banks’ customers make infrequent, large purchases structured around life changes—a customer doesn’t purchase a master’s degree or a mortgage on a daily basis, but rather in response to a major life event.

## Easier Than Ever to Circumvent Branches



**Top 5 Day-to-Day Banking Channels By 2015**

1. Mobile
2. Web
3. ATM
4. Call center
5. Branch locations

**Losing opportunities for personal interaction**

## Infrequent, Large Purchases Structured Around Life Changes

Source: Deloitte Center for Banking Solutions, *Evolving Models of Retail Banking Distribution*, http://www.deloitte.com/assets/Dcom-UnitedStates/Local%20Assets/Documents/us_fsi_CBS_Evolving_Models_may08.pdf, accessed October 15, 2012; Education Advisory Board interviews and analysis.

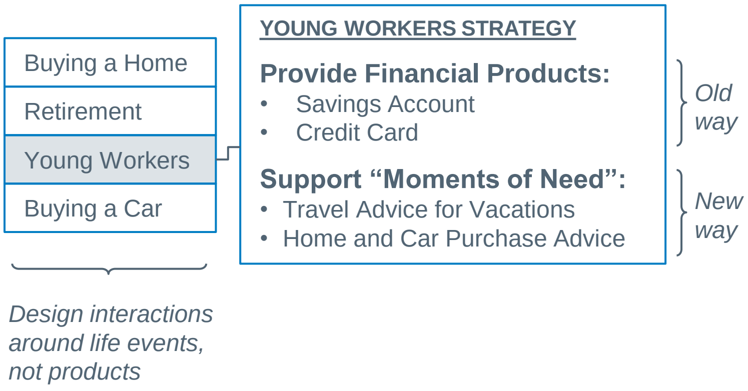
# Banking’s Response to the “Search and Shop” Customer

Three responses to the “Search and Shop” customer emerged from the financial services industry in the past decade—and all three map to similar practices being leveraged by the most innovative continuing, professional, and online education units. First, banks have layered value into the search process by designing interactions around life events instead of products. Second, banks have set their sights on the highly attractive economics of fostering customer loyalty and repeat purchase behavior (rather than focusing entirely on recruiting new clients). Finally, banks are offering strategic incentives to encourage word-of-mouth promotion, thereby bringing in customers who are less expensive to acquire and more profitable over a lifetime due to their better fit with the organization.

## Mirroring Questions Manifesting in Continuing, Professional, and Online Education

### I

### Adding Value in the “Search Process”



- Buying a Home
- Retirement
- Young Workers
- Buying a Car

Design interactions around life events, not products

**YOUNG WORKERS STRATEGY**

**Provide Financial Products:**

- Savings Account
- Credit Card

*Old way*

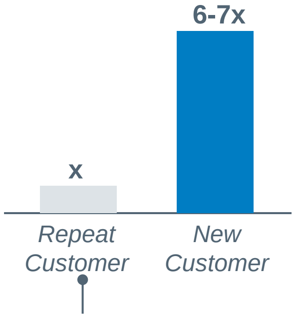
**Support “Moments of Need”:**

- Travel Advice for Vacations
- Home and Car Purchase Advice

*New way*

### II

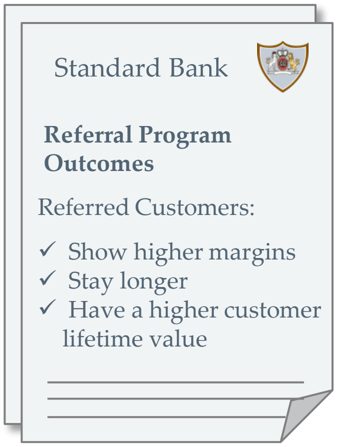
### Fostering Repeat Purchase Behavior



Six to seven times less expensive to sell to existing customers

### III

### Rewarding Word-of-Mouth Referrals



Standard Bank

**Referral Program Outcomes**

Referred Customers:

- ✓ Show higher margins
- ✓ Stay longer
- ✓ Have a higher customer lifetime value

Source: Schmitt, Phillip; Skiera, Bernd; Van den Bulte, Christophe, *Referral Programs and Customer Value*, http://www.marketing.uni-frankfurt.de/fileadmin/Publikationen/Schmitt-Skiera-vandenBulte-2011-Referral-Programs-Customer-Value.pdf, accessed Nov 10, 2012; Education Advisory Board interviews and analysis.

# Websites No Longer Fostering Conversations

When debating how to add value in the search process, marketing experts consider adding content to their website, but they encounter a Catch-22 here. As websites improve by providing the most sought-after information, satisfied prospects are now able to move straight to the application or registration stage of the funnel—and bypass the traditional courting phase (e.g., phone or email conversations). Stealth applicants, growing in number across the board, are a concern because they represent missed opportunities for the personal interactions that are highly correlated with enrollments. Equally worrisome is the unpleasant realization that for every stealth applicant, there are countless other prospects that shopped and moved on, without the organization being able to convert them.

For advice on crafting effective inquiry forms, see Tool #13: Inquiry Form Builder

### "Wayback"-ing the Internet Shows Most Must-Know Program Details Now Online

**COE Forum Audit of Selected COE Websites**

**Most Sought-After Information**

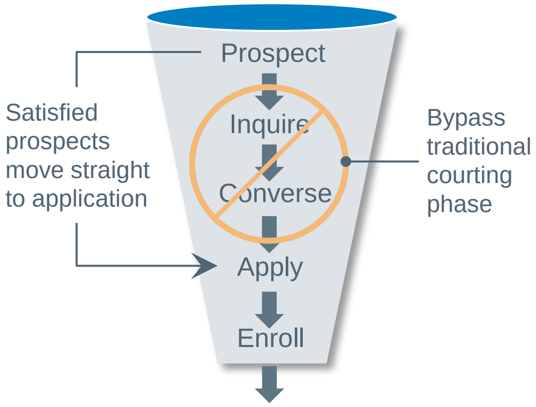
1. Cost to attend
2. Program offerings
3. Financial aid
4. Time to completion
5. Transfer credit policy
6. Classroom format
7. Graduate placement and outcomes

**Availability of Information, 2007 vs. 2012**

| COE Unit | 2007 Score | 2012 Score |
|---|---|---|
| University A | 5 | 7 |
| University B | 3 | 5 |
| University C | 3 | 7 |
| University D | 5 | 6 |
| University E | 4 | 7 |
| University F | 6 | 7 |
| University G | 4 | 6 |
| Average | 4.6 | 6.3 |

Significant improvement in past 5 years

### Unintended Consequence: Obviating the Necessity of a Conversation



### Still Grasping Full Impact

- Average 30%-40% adult applicants (and up to 85%) now stealth and climbing
- Missed opportunity for interactions that were both compelling and a means of gauging likelihood to convert
- Indication of more "shoppers" under the radar you've never met

Source: Stamats, *2012 Adult Students TALK;* Education Advisory Board interviews and analysis.

To address this challenge, marketing leaders must find ways of engaging with prospects earlier in their decision-making process.

### The Challenge—Getting Incorporated Earlier into Students' Decision Process

"By the time a prospective student shows up on our radar, they're a lot further along in their decision process than they've been in the past. They've probably already made their choice. What worries me is how many people decided to sign up somewhere else before I had a chance to talk to them. If we want to talk to prospective students, we're going to have to find ways to get involved earlier in their decision-making process."

*Associate Dean of Marketing*
*School of Continuing Education*
*Public Research University*

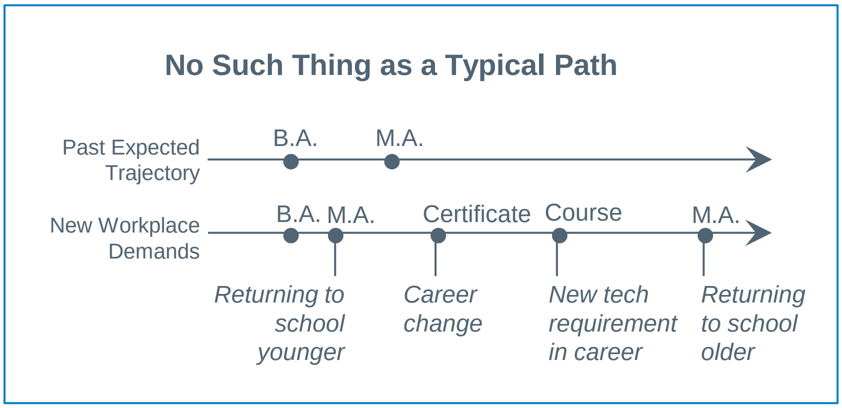
Source: Education Advisory Board interviews and analysis.

# Making Sure Alumni Return to You for Their Next Step

The second key to developing relationships with “Search and Shop” students is to encourage repeat purchases, or ensuring that alumni return for their next educational need, whether another course, certificate, or degree.

More so than ever before, students are forgoing the “typical path” to returning to school at a certain age and instead are pursuing education younger, older, and for new and varied workplace-driven reasons. However, increased lifetime purchasing behavior is a boon only if institutions can propose the right next educational step at the right time in a prospect’s career or life path while also staying top-of-mind among occasional buyers.

## Multiple Entry Points into Education a Dual Opportunity and Challenge for COE



**More Opportunities for COE to See Repeat Customers, But…**

***Difficult to Propose Right Next Step at Right Time***

Schools lack data and student career paths lack predictability

***Challenge to Stay “Top of Mind” for Occasional Buyer***

Brand loyalty easiest when products recurring part of daily life and switching costs high

Source: Education Advisory Board interviews and analysis.

# Where Nonprofit Schools Have the Advantage

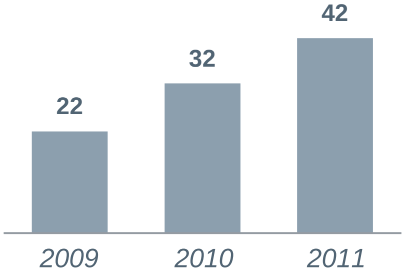
Finally, front-of-pack institutions are wondering how best to increase word of mouth enrollments—an area where for-profit universities have increased their attention in light of pressure from Wall Street to lower their acquisition cost. For-profit institutions like DeVry are funneling resources into improving their Net Promoter Score, a measure frequently used in the private sector to gauge customers’ willingness to recommend a product, but nonprofit institutions have the advantage in terms of word-of-mouth promotion. A survey of 1,200 online degree students found that word of mouth, though the top source of enrollments for both for-profits and nonprofits, is almost 50% more powerful at nonprofits.

## For-Profits Recognize Importance, but Not as Well Suited

### For-Profits Looking to Referrals to Lower Cost per Lead

**Net Promoter Score**

*“How likely are you to recommend DeVry to a friend or colleague?”*

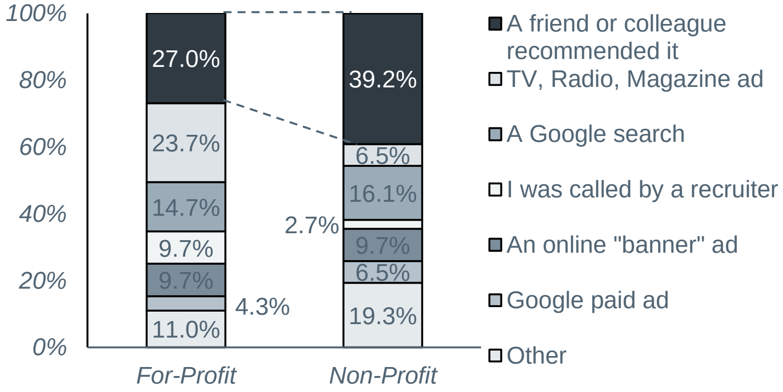


Nearing objective for world-class score of 50

DeVry University

### But Word of Mouth 50% More Powerful at Non-Profits

*“How did you first learn about your school?”*



Source: *DeVry 2010-2011 Academic Annual Report*, http://newsroom.devry.edu/images/20004/2010-2011AcademicAnnualReport_lo%20res_FINAL.pdf, accessed Nov 1, 2012; Education Advisory Board interviews and analysis.

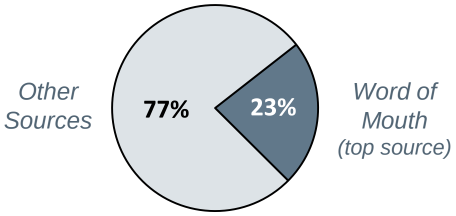
# In Spite of Ourselves

During the recent economic recession, many continuing, professional, and online education units performed an internal analysis of their marketing spend to identify areas where more (or less) attention might be needed. One private COE unit was surprised to find that not only was word-of-mouth advertising bringing in nearly a quarter of its enrollments, it was doing so at a fraction of the cost of expensive pay-per-click strategies and with similarly strong conversion rates. Examining this data prompted leaders to wonder how intentional efforts to grow word-of-mouth advertising could redefine enrollment strategies and costs.

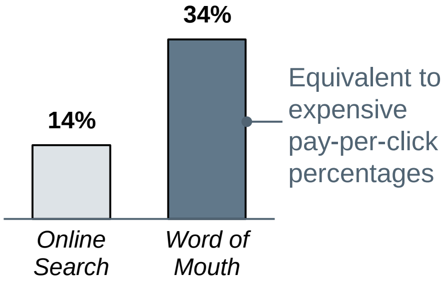
## Word of Mouth The Top Enrollment Source in Many COE Member Internal Analyses

**"How Did You Hear About Us?"**

*Private University COE Unit*



**Strong Conversion Rates Compared to Second-Top Source**



### Imagine if We Tried

"When you look at number of leads, cost per lead, conversion rates, it's hard to beat the power of word-of-mouth…but that's all really happened in spite of ourselves, not due to any strategy or investment. Imagine what our enrollments and costs could look like if we actually tried to spend more time and effort on word-of-mouth marketing."

*Dean of Continuing Education*
*Private Research University*

# Reaching “Search and Shop” Students

The marketing and recruiting breakthroughs profiled in the pages that follow are the product of over 200 conversations with marketing and recruiting experts both within and outside higher education. Each idea will be addressed in more detail in the following pages.

The majority of the tactics profiled in this publication are from organizations dedicated to continuing, professional, and online education. However, at the encouragement of members, we also include innovative ideas from other organizations within higher education (e.g., professional schools) and from the private sector in cases where the lessons are especially useful and transferrable to continuing, professional, and online education.

## Road Map for Discussion

### I

**Adding Value in the Search Process**

1. Profession Entry FAQ Portal
2. Career-Changer Diagnostics
3. All-Inclusive Career-Changer Support
4. Corporate Outplacement Partnerships
5. Lifetime Career Success Services

### II

**Fostering Repeat Purchase Behavior**

6. Intersession Professional Skills Boot Camp
7. Recent Graduate Support Portal
8. Next-Course Recommendation Engine
9. Loyalty Clubs
10. Stackable Certificates
11. Career Path Mapping
12. Stop-Out Re-approach Protocols

### III

**Rewarding Word-of-Mouth Referrals**

13. Course Testimonial Prompts
14. Tell-a-Friend Infotainment Messaging
15. Transferrable Free Course Vouchers
16. Alumni Referral Scouts

# Adding Value in the Search Process

## Creating Differentiated Messages and Services for Recruiting Career Changers

# Key Insights

***How Do We Add Value in the Search Process?***
***Creating Differentiated Messages and Services for Recruiting Career Changers***

1. **Typical Marketing Focuses Narrowly on "Purchase" Rather Than Lifecycle Choices:** Typical program marketing content is strong at providing information about the educational product (e.g., curriculum, price, start dates, faculty), but falls short at responding to prospects' many questions and anxieties about whether they're interested in a particular career.

## Breakthrough Practices

2. **Provide Valuable Industry News as Excuse to Stay in Touch**: Encourage prospects to "opt in" to emails or social media updates, with content primarily focused on non-commercial industry news but also designed to keep the university top-of-mind through a potentially long decision cycle.

3. **Reduce Prospects' Risk of Career-Changing:** Design website content to help prospective students understand the end-to-end requirements of entering a new career, reducing the "search costs" for students by aggregating into one place all the information needed to weigh the cost, risks, and benefits of breaking into a new field.

4. **Use Online Assessment as Springboard for Meaningful One-on-One Conversation:** Develop online career assessments for career-changers to evaluate whether a new field is the right fit, providing an opportunity and discussion points for the university to meaningfully converse on topics where the prospect needs life guidance.

# Not Addressing the Full Range of Questions

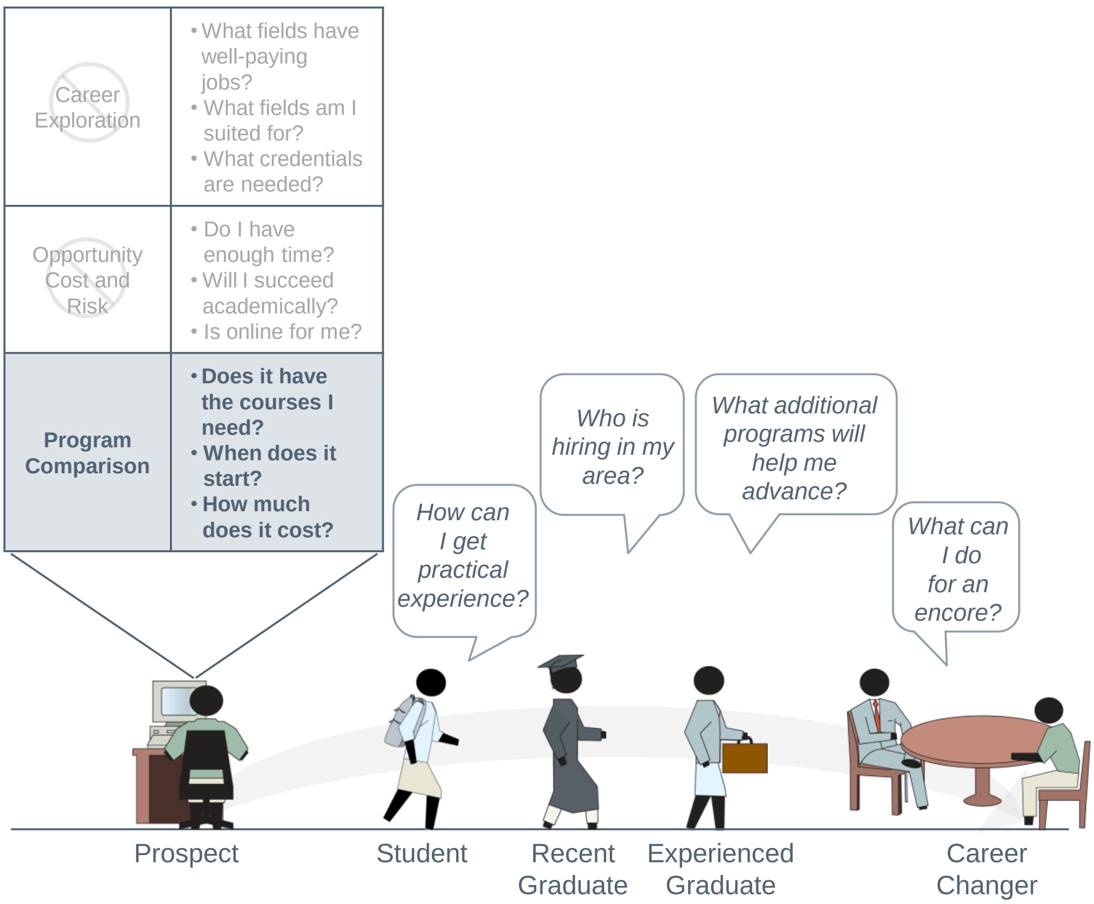
Although institutional and program-specific websites have improved significantly in recent years, they still fall short of providing information beyond the transactional. Bigger questions that address the opportunity cost, risk, and job options associated with an educational offering are often the source of a great deal of hesitation and anxiety among prospective students, yet these questions typically go unanswered in marketing and recruitment processes. Innovative marketers are formulating ways of addressing the broader range of lifecycle questions that underpin a decision to return to school.

The next few pages will toggle between two for-profit online enablers partnering with institutions to, among other things, add value in the search process.

## Typical Marketing Focuses Narrowly on "Purchase" Rather Than Lifecycle Choices

**Searching and Shopping…**

**…Across a Career**



| | |
|---|---|
| Career Exploration | • What fields have well-paying jobs?<br>• What fields am I suited for?<br>• What credentials are needed? |
| Opportunity Cost and Risk | • Do I have enough time?<br>• Will I succeed academically?<br>• Is online for me? |
| **Program Comparison** | **• Does it have the courses I need?**<br>**• When does it start?**<br>**• How much does it cost?** |

For more information on differentiating communications according to prospective students' needs, see Tool #1: Buying Cycle-Based Lead Nurturing Map

Source: Education Advisory Board interviews and analysis.

# The Vision: Supporting Encore Careers

Much can be learned from well-funded start-up initiatives. Where and how they choose to invest their money sheds light on what emerging trends (and threats) in the marketplace are critical to track and respond to.

For example, Empowered UCLA Extension, the brainchild of a unique collaboration between Silicon Valley, UCLA, and Hollywood, is putting its proverbial and literal money on certificate programs for late-in-life career changers. Empowered UCLA Extension built a suite of certificates—and a marketing strategy—with the needs of such students in mind.

## Career-Changing Certificates for Baby Boomers

empoweredUCLA Extension

**Silicon Valley**

Know-how from entrepreneur Steve Poizner; raised $15M venture capital funding

+

**UCLA**

Curriculum and instruction from UCLA Extension, based on pre-existing certificates

+

**Hollywood**

Creative Artists Agency national marketing campaign; $2M in scholarships from actors

- Classes started September 2012
- 10 certificate programs; 200+ students
- Minimum $5M royalties over five years

1

**Fields for Late-Career Changers**

For those displaced, stalled, or looking for social impact (e.g., health care management, college counseling)

2

**12-Month Certificate; Must Be Completed in 24**

Serious students only; heavy discount for up-front payment

3

**For the On-the-Go Professional**

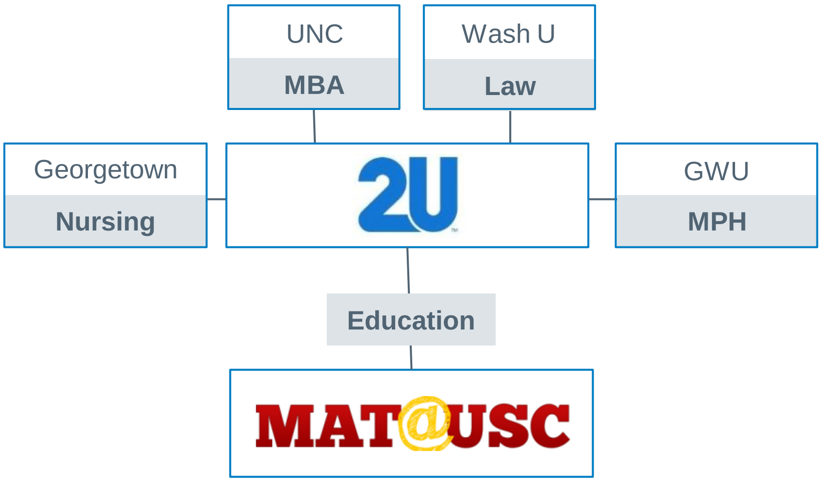
Completely on the iPad

Source: Education Advisory Board interviews and analysis.

# The Vision: Quality at Scale

A second collaboration among a for-profit company and several universities also merits observation: online enablement vendor 2U (formerly 2Tor) plans to build a high-touch yet scalable experience for students throughout the lifecycle, from the prospect stage through to the alumni stage. The first 2U partner, the MAT@USC, is a private-label online master of arts in teaching program that displays 2U's exclusive, discipline-specific model; unlike similar vendors, 2U will only partner with one university per discipline. The MAT@USC also showcases 2U's commitment to working with a student audience that is orders of magnitude larger than that of similar programs; their goal is to eventually reach thousands of enrollments per year.

## USC and 2U (formerly 2Tor) Pilot High-End Online Professional Program Model



UNC **MBA**

Wash U **Law**

Georgetown **Nursing**

2U

GWU **MPH**

**Education**

MAT@USC

- First 2U program in 2008
- ≈2,000 enrollments to-date
- $96M in financing

### 1

### Exclusive Partnerships

One university partner per discipline avoids conflict of interest, sharing of "trade secrets"

### 2

### Orders-of-Magnitude Larger

Target enrollments in the thousands, not the hundreds, nationally and globally

### 3

### Private Label

Only university brand featured in advertising and interface

Source: Education Advisory Board interviews and analysis.

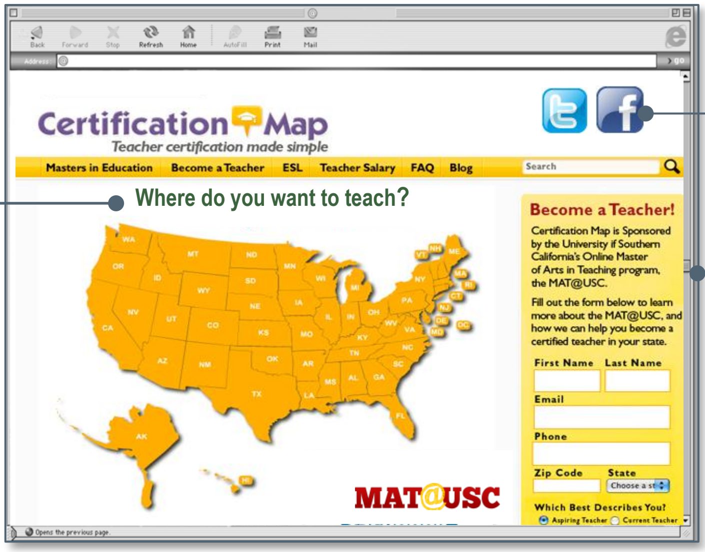
# Do You Have What It Takes?

The MAT@USC first adds value in the search process by helping potential entrants to the high-churn field of teaching determine whether the transition is the right fit for them. The MAT@USC's Teacher Certification Map website provides critical information about the costs, risks, and benefits related to entering the field (e.g., testing requirements, salaries by state, job availability).

Additionally, visitors can opt in to future communications (e.g., through Facebook) that will continue to provide valuable information about the teaching profession without applying pressure on prospective students to inquire. Given the long decision cycle of many MAT@USC prospects, these industry updates are critical to staying close to prospects for when they are ready to apply.

## Helping Students Reduce the Risk of Entering a High-Churn Profession

**MAT@USC Teacher Certification Map**



Become a Teacher!

Certification Map is Sponsored by the University if Southern California's Online Master of Arts in Teaching program, the MAT@USC.

Fill out the form below to learn more about the MAT@USC, and how we can help you become a certified teacher in your state.

First Name
Last Name
Email
Phone
Zip Code
State: Choose a st
Which Best Describes You?
● Aspiring Teacher ○ Current Teacher

1 **Non-commercial Focus on Career Transition FAQs**
Testing requirements and salaries by state; information on Education Master's

2 **"Direct Sell" Visible, but Relatively Minor**
Inquiry form and links to MAT@USC visible, but are small percentage of page

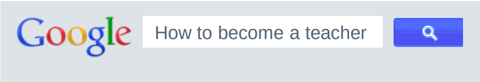
3 **Stay in Touch Even if You Don't Inquire**
Facebook, Twitter, blog addressing industry news, tips, common concerns (e.g., best locations for young teachers, shortage areas)

Source: Education Advisory Board interviews and analysis.

# Becoming the Go-To Resource

A top hit in Google searches for "how to become a teacher" and the like, the Certification Map has become a go-to resource for prospective teachers to learn about the profession. Many visitors return to the site when they are ready to take the next step; roughly a quarter of the MAT@USC's leads come from the Certification Map.

**Where to Go to Learn About Becoming a Teacher**

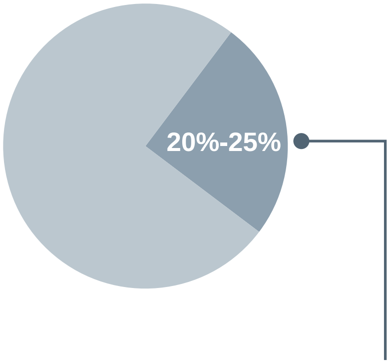


**Top 3**

Rank of Certification Map in search results for "How to Become a Teacher" and similar keywords

**Where to Go to When You're Ready to Take the Next Step**

*MAT@USC Leads*



Generated from the Certification Map inquiry form

Source: Education Advisory Board interviews and analysis.

# Don’t Have Time to “Find Yourself”?

Prospective students looking to start or change careers are often particularly hesitant to enter a new online program, and seek reassurance that a program will be a worthwhile investment for their professional aims while accommodating their busy schedules. To meet the focused needs of late career changers, Empowered UCLA Extension hired former eHarmony engineers to develop a career assessment test that helps prospective students quickly zero in on their best-fit program, whether a career change in that field is realistic and the appropriate, and their suitability for an online program.

In addition to providing the prospect with valuable information, the assessment results also provide enrollment counselors with quality material to incorporate into a follow-up conversation. Understandably, these subsequent phone conversations, built around prospect’s hopes, strengths, weaknesses, and preferences collected during the assessment, are a compelling recruiting touch point.

## 15-Minute Online Career Assessment to Accelerate the Decision Process

**Select Fields of Interest**

- ○ Marketing & New Media
- ○ IT Management
- ○ College Counseling
- ○ Health Care Management
- ○ Nonprofit Management
- ○ Global Sustainability
- ○ Project Management
- ○ Human Resources
- ○ Financial Planning
- ○ Patient Advocacy

**Certificate Interest Match**
*Would you like the daily activities?*

**Education and Experience**
*How related is your previous work?*

**Learning Style and Online Learning Presences**
*Is online learning right for you?*

empoweredUCLA Extension

**Technology Preferences**
*How much assistance will you need to complete?*

**Follow-up Call to Discuss**

★★★☆☆

**Fit Rankings for Each Selected Field**

Occasion for **personalized** conversation

For guidance on when and how to incorporate phone touches in the lead nurturing process, see Tool #2: Guidelines for When to Call a Prospect; Tool #4: Lead-Prioritizing Phone Script; and Tool #12: Follow-Up Conversation Scripting Tool

Source: Education Advisory Board interviews and analysis.

# At No Extra Charge

One of the value-added resources most appealing to Empowered UCLA prospects is the suite of long-term, all-inclusive career transition services that will support students during and after the program. These extensive resources, ranging from self-assessment tools to group workshops with peers and career changers—are available for two years—a full year beyond the anticipated time to certificate completion.

## Suite of Career Transition Services Included with Each Certificate

**Updating Boomer Job-Hunting Skills**

- How to market your certificate
- Social media branding (i.e., LinkedIn profiles)
- Career-change narratives

| Career-Changer Services | Private Career Counseling | Included with Empowered Program |
|---|---|---|
| Individual Career Counseling | YES | YES |
| Self-Assessment Tools | YES | YES |
| Access to Career Counselor | -- | YES |
| 15-Module Career Management Curriculum | -- | YES |
| Group Workshops with Peers and Career Changers | -- | YES |
| iPad Interface and Self-Service Resources | -- | YES |

First two services alone valued at $8,000

Private Career Counseling: Typically only a few months

Included with Empowered Program: Two full years

Source: Education Advisory Board interviews and analysis.

# No Longer “Up in the Air”

The career transition resources provided by Empowered UCLA Extension’s certificate programs have caught the attention of corporate giants like Intel who wonder if the programs might be an attractive option for departing employees. If these early partnerships are sustained, EmpoweredUCLA could be making an entre into a lucrative field. When George Clooney’s *Up in the Air*, a movie about the world of corporate outplacement, debuted, the extra light shed on the outplacement industry revealed that companies were sinking a great deal of money into services that left neither employer nor ex-employee satisfied.

## Career Services Capturing the Attention of Companies

### Company-Funded Program Provides Smoother Transition for Retiring Employees

**First Empowered UCLA Extension Corporate Partnership**

> "Intel strives to be a great place to work and provides unique opportunities for all of its employees. We know our employees have the skills and passion to continue on into an encore career and this program can help them with that transition.”
>
> *Amber Wiseley*
> *Intel U.S. Retirement Benefits*

### An Alternative to the Outplacement Industry?

- $4B industry
- Standardized services offer little value
- Short time frames ineffective
- *Average cost per employee:* $7,578 for executives, $3,793 for managers

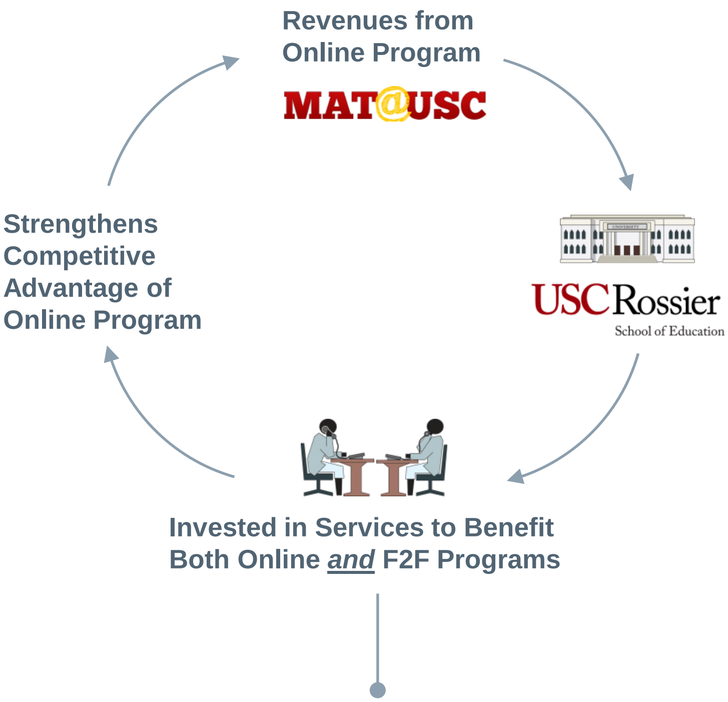
Source: Dvorak, Phred and Liublin, Joann, *Outplacement Firms Struggle to Do Job*, http://online.wsj.com/article/SB125069793645343423.html, accessed November 3, 2012; *Empowered UCLA Extension Teams Up With Intel to Support Retiring Workers*, http://online.wsj.com/article/PR-CO-20121002-903210.html, accessed November 3, 2012; Education Advisory Board interviews and analysis.

# No Expiration Date

The MAT@USC envisions a future in which its commitment to providing value to students begins at the search stage and continues indefinitely. By investing online revenues in services that benefit both online and F2F programs, the MAT@USC plans to initiate a virtuous cycle that would strengthen its competitive advantage, which in turn would grow revenues and allow for even greater investment in the school as whole.

The keystone among these plans is a renewed commitment to providing lifetime career services. Advising provided by former teachers will coach graduates through professional milestones and will help ensure the quality and outcomes of their teaching. Thanks to a systematic data collection plan, those issues that career counselors frequently address with students will be incorporated into future e-resources and possibly into the curriculum, thereby ensuring that services are scalable.

## Online Revenues Fund Future Lifetime Career Support for ***All*** Rossier Grad Programs



### Lifetime Career Success Services

*(Future Plans)*

**Same Academic Advisor Post-Program**

- Former teachers
- Available for phone, email, chat
- *As long as you're in the profession*

**Coaching Through Professional Milestones**

- Preventing teacher churn
- Meeting "significant gains" goals

**Continuous Improvement of E-Resources**

- Topics raised often one-on-one become webinars and online advice portals
- "Field" experiences and questions feed into MAT curriculum modification

Source: Education Advisory Board interviews and analysis.

# Recapping Key Lessons

Recognizing disparate available resources among institutions, and that many members must pursue excellence without more time, budget, or staff than they currently have, we have distinguished Quick-Win practices (those tactics requiring minor investment in time or resources and that are more likely to achieve fast results) from Long-Term Differentiators (tactics that are potentially transformational, but that are more speculative and/or require larger investments in technology, expertise, or cultural change).

For members unable to invest in Long-Term Differentiators immediately, we recommend that Quick Wins may help generate the resources needed to fund longer-term activities. We have arrayed our breakthrough practices along the spectrum here.

## Adding Value in the Search Process

| | |
|---|---|
| #1 | Encourage prospects to “opt in” to emails or social media updates, with content primarily focused on non-commercial industry news, but also designed to keep the university top-of-mind through a potentially long decision cycle. |
| #2 | Design website content to help prospective students understand the end-to-end requirements of entering a new career, reducing the “search costs” for students by aggregating into one place all the information needed to weigh the cost, risks, and benefits of breaking into a new field. |
| #3 | Develop online career assessments for career-changers to evaluate whether a new field is the right fit, providing an opportunity and discussion points for the university to meaningfully converse on topics where the prospect needs life guidance. |

Source: Education Advisory Board interviews and analysis.

# Fostering Repeat Purchase Behavior

## Providing Exclusive Benefits and Defined Career Maps for “Repeat Customers”

# Key Insights

### *How Do We Foster Repeat Purchase Behavior?*
### *Providing Exclusive Benefits and Defined Career Maps for “Repeat Customers”*

1. **High Giving Rates Represent Surprising Attachment by Professional Alumni:** Despite the misassumption that COE alumni—lacking the “fullness” of the traditional undergraduate experience—are less attached, some universities are finding graduate professional giving rates even higher than that of undergraduates, with breakthrough organizations leveraging professional alumni loyalty not only for fundraising, but also repeat business and referrals.

2. **Difficult to Propose Right Next Step at the Right Time:** The primary challenge to capturing repeat customers is one of timing; most education institutions lack the advanced analytical capabilities—not to mention student career paths lack the predictability—to know when alumni will be ready for each next educational step (much less what these steps will be).

3. **Challenge to Stay “Top of Mind” for an Occasional Buyer:** Brand loyalty is easiest to build and sustain in industries where products are a recurring part of daily life and switching costs are high, neither of which is particularly true of continuing and professional education.

## Breakthrough Practices

4. **Recommend Courses Based on Peers with Similar Interests:** Incorporate “students like you” course recommendations on each course webpage, using a no-algorithm-needed combination of already-existing course groupings and enrollment data.

5. **Develop “Stackable” Offerings:** Design stackable credentials (i.e., multiple certificates summing to a degree) to provide students with an interim sense of progress as they make headway toward a degree.

6. **Provide Exclusive Benefits for Frequent Buyers:** Create loyalty programs that provide financial and other incentives (e.g., special workshops) for students to pull forward courses and complete certificates in compressed amount of time.

7. **Ask for the Estimated Time Frame to Follow Up:** Hold exit interviews with stop-outs and recent or soon-to-be graduates, asking for the approximate time frame (and permission) to re-approach them about returning to complete their degree or start the next one.

8. **Work with Companies to Match Offerings to Career Paths:** Form long-term partnerships with key employers, mapping COE programs to the most common career paths, steering employees to the best-fit university programs for each subsequent educational need on the journey to the “corner office.”

9. **Design Career Advising Content to Stay in Touch and Suggest Next Steps:** Create alumni portals focused not only on obtaining employment, but also on succeeding and advancing in one’s career; ensuring the portal is incorporated into daily life will keep the institution “top of mind” when alumni are ready for their next educational step, with taster courses embedded in the portal to aid with the decision.

# Stronger Loyalty Than Expected

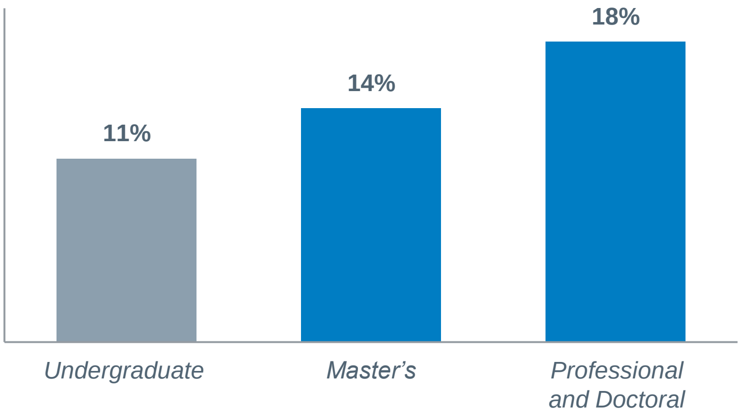
Although lacking the full residential four-year experience, which many assume is critical to developing strong ties to an institution, adult and professional students often actually demonstrate greater institutional loyalty than their undergraduate counterparts. Upon analyzing the breakdown of its alumni association members, one large public university found master's and professional students to participate at higher rates than undergraduates, likely due to their higher income, their more immediate return on their educational investment, and their professional identity which more closely ties them to discipline-specific programs or schools.

Savvy higher education institutions look upon adult and professional education alumni loyalty as a promising source not only for donations, but also for repeat customers.

## Debunking Myth that Whole Campus Experience Necessary for Attachment

**Higher Alumni Association Membership Among Professional Alums**

*Large Public University*



- ✓ **Considerable Disposable Income Already**

  Six-figure salaries not uncommon among many COE students

- ✓ **See Immediate Value from Education**

  Tangible, often material, benefit to career

- ✓ **Education Tied to Current Professional Identity**

  Connection to discipline-specific school or program, contrast to broad undergraduate experience

Source: Education Advisory Board interviews and analysis.

# Making Liberal Arts Alumni More “Marketable”

One key to instilling loyalty is providing returning students with the right next step at the right time. Given the proliferating news stories about the difficulty recent college graduates face in obtaining employment, the Fullbridge organization saw huge market potential in providing recent undergraduates with the skills needed to enter and succeed in the professional world. Their program consists of a professional-skills boot camp built by MBA faculty and delivered over an intensive four-week session. Students, universities, and professionals in knowledge economy jobs have all been eager Fullbridge customers.

We advise that COE units are well-positioned to provide similar boot camps for their own alumni and other recent graduates. Providing real-world value to recent graduates, in addition to generating enrollment from the program itself, schools can cement alumni loyalty to enhance the likelihood that they will return for later lifelong learning needs.

## $5.5 Million Venture Capital Funding for Start-Up to Help Recent Undergrads Get Jobs

### Start-Up Creates Curriculum Designed by MBA Faculty

THE
FULLBRIDGE
PROGRAM

**Intersession Professional Skills Boot Camp**

- 4-week summer or winter session
- Team projects simulate the work environment
- Basic business, professional, and entrepreneurship skills
- Help with job placement (forthcoming)

### Multiple Sales Channels

**Selling Program Directly to Students**

- Fullbridge-run sites in NY and Boston
- Recent attendees include Harvard, Brown, Cornell, Colgate students
- Price: Approximately $5,000-$6,000 (plus housing)

**Turnkey Curriculum for Universities**

- Bowdoin College first partner for intersession program (Jan 2013)
- Price: $4,500 (inc. room and board)

**Knowledge Economy Jobs Needing Business Skills**

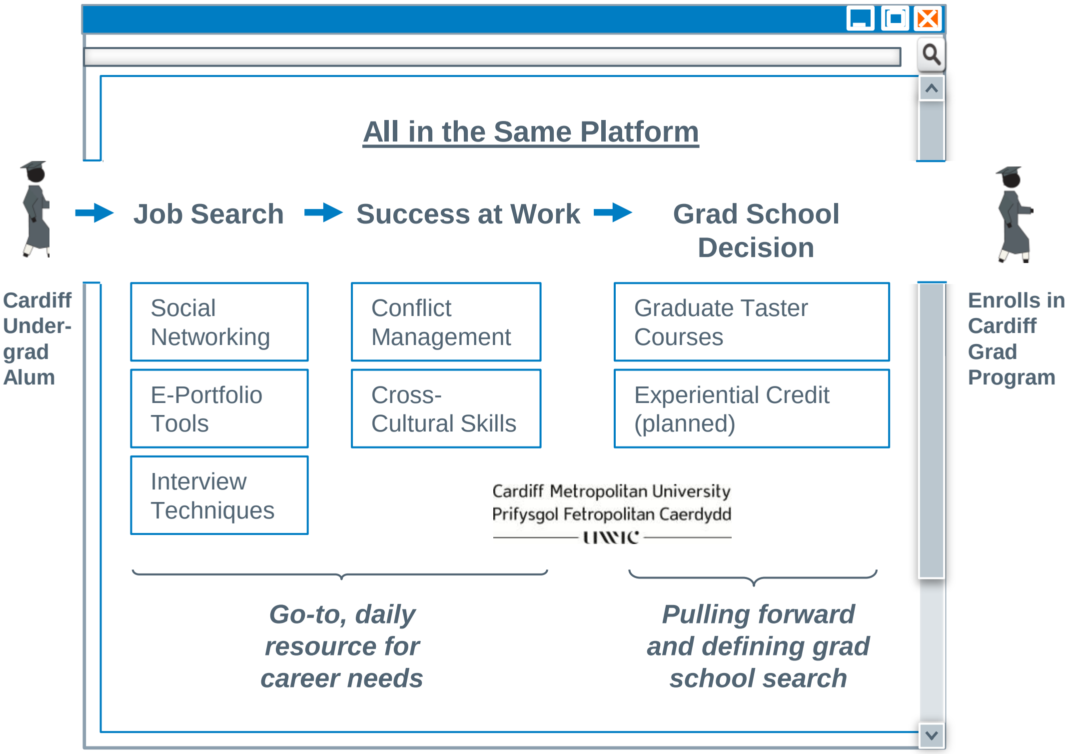
- Basic business skills for entry-level law associates
- Helping mid-level law associates understand client and partner needs
- Non-MBAs entering consulting firms

Source: Education Advisory Board interviews and analysis.

# Staying “Top of Mind” Among Alumni

The reality that most undergraduates are not ready to return to school soon after graduating means that if institutions want to bring former students back, they must stay close and remain relevant in alumni lives. Cardiff Metropolitan University does just that through an online portal that provides graduates with a suite of career-building resources that meet their developing needs. A one stop shop that help graduates find jobs, grow their skills, and move up the career ladder, the portal has become the go-to, daily resource for alumni’s career needs. When they are ready to consider graduate school, the portal pulls alumni back to their alma mater by offering graduate taster courses and experiential credit.

## Being There to Catch Former Students When They’re Ready for Their Next Step



**All in the Same Platform**

**Cardiff Under-grad Alum** → **Job Search** → **Success at Work** → **Grad School Decision** → **Enrolls in Cardiff Grad Program**

| Job Search | Success at Work | Grad School Decision |
|---|---|---|
| Social Networking | Conflict Management | Graduate Taster Courses |
| E-Portfolio Tools | Cross-Cultural Skills | Experiential Credit (planned) |
| Interview Techniques | | |

Cardiff Metropolitan University
Prifysgol Fetropolitan Caerdydd
UWIC

*Go-to, daily resource for career needs*

*Pulling forward and defining grad school search*

Source: Education Advisory Board interviews and analysis.

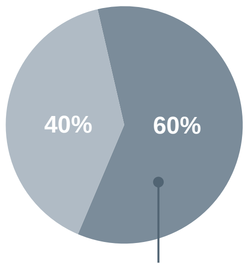
# Early Returns from the Portal’s First Year

Early indicators show that Cardiff Metropolitan University’s career portal is a valuable resource to both graduates and their alma mater. Most users access the portal multiple times per week, which has cultivated a stronger alumni attachment: the number of queries about donations and volunteer opportunities has nearly doubled since the portal was launched. Regular engagement with their alma mater also convinced more of them to return for continuing or graduate education. Although contacts are wary to attribute causation to the portal, they have observed a 12% increase in alumni enrollments in graduate programs in the portal’s first year.

As they plan for the future, contacts at Cardiff Metropolitan University hope to provide students with access to the portal before they graduate so they develop earlier familiarity with its resources and get a head start on job hunting.

Cardiff Metropolitan University
Prifysgol Fetropolitan Caerdydd
UWIC

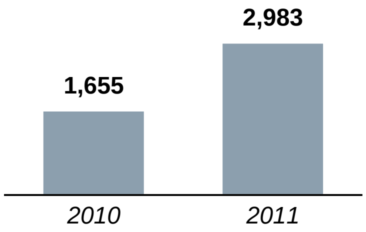
## Integrated into Daily Life



Users logging on to portal multiple times per week

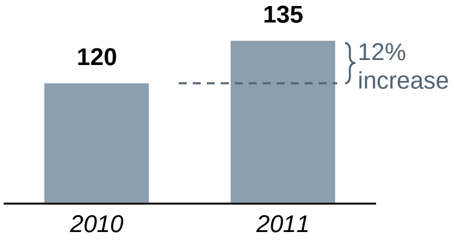
## Stronger Alumni Attachment

*Queries About Donations and Volunteer Opportunities*



## Back to the Alma Mater

*Undergraduate Alumni Returning for Graduate Programs*



**Starting Earlier: Providing Access Before Graduation (forthcoming)**

- Begin building e-portfolio
- Head start on job hunting

Source: Education Advisory Board interviews and analysis.

# Even if You Don't Have the Resources of Amazon

Choosing an educational product can be overwhelming for those prospective students selecting from a dizzying array of individual courses. Many institutions have wanted to provide Amazon.com-type "people like you" recommendations on course webpages to help with students' decision, but felt too daunted by not having the resources of retail e-commerce giants. Fresno Pacific University's Continuing Education unit identified a way to provide course recommendations without needing Amazon's resources.

Fresno Pacific's portfolio caters to teachers looking for professional development courses—individuals who make a decision quickly and who cannot be nurtured over time, making it difficult to recruit first-time buyers. As a result, Fresno Pacific aims to bring current and former students back for subsequent courses by featuring three "students like you" course recommendations on each specific course's webpage; this list reflects the most commonly taken courses within the same topical cluster; no complicated algorithm is needed.

## "People Who Enrolled in This Course, Also Enrolled in…."

FRESNO PACIFIC UNIVERSITY

**PROFESSIONAL DEVELOPMENT COURSES FOR EDUCATORS**

**Subject Areas**

**Athletics**

**Social Studies**
- **Early American History**
- **California History**
- **Women's History**

**Language Arts**

**Mathematics**

*Social Studies 943:*
Boston & American Revolution

Students who enrolled in this course also enrolled in:
- ➢ *America's Founding Documents*
- ➢ *Washington D.C. Capital Sites*
- ➢ *Puritan New England*

### The Challenge: Short Decision Cycle for Stand-Alone Online Courses

- A few weeks or even a few days
- ***Much easier to recruit to second or third course rather than first***

### The Solution: No Algorithm Needed "People Like You" Recommendations

- Courses already organized into topic clusters (for course catalog and internal administrative purposes)
- Top three courses in related cluster displayed on each course webpage
- System doesn't include any courses already taken by logged-in students

Source: Education Advisory Board interviews and analysis.

# Loyalty Programs: Not Just for Airlines

Repeat purchase behavior can be taken to the next level by encouraging students who have completed a handful of courses to aim for a certificate. NYU's School of Continuing and Professional Studies realized that the dangling carrot of a within-reach educational reward (the certificate), along with urgency factors and incentives, provides powerful motivation to complete a certificate.

NYU's loyalty club for non-credit students, the Dorothy Durkin Torch Circle targets individuals who show a propensity for lifelong learning behavior and seem willing to anchor that behavior with NYU. To be eligible for membership, students must complete five non-credit courses in no more than six semesters, in reward for which members receive a financial discount and access to special events and career services. The ticking clock pulls enrollment decisions forward, and membership benefits and greater attachment to the school drive greater loyalty and willingness to return.

Initially wary of offering the financial discount, contacts at NYU's SCPS report that the program has more than recouped its costs. Contacts also observed an unanticipated outcome: Torch Circle members began transferring their lifelong learning to degree programs.

## Converting Stand-Alone Course-Takers to Certificate Students

*Enroll in five or more  courses in six semesters*

**NYU SCHOOL OF CONTINUING AND PROFESSIONAL STUDIES DOROTHY DURKIN TORCH CIRCLE**

- 15 percent discount on eligible non-credit courses
- Special events and networking opportunities
- Complimentary Career, Education, and Life Planning course valued at $200
- Two free career coach sessions

**Ticking Clock Pulls Forward Decision to Enroll**

- 5-7 courses required for full certificate
- Financial incentive and compressed time frame motivate quicker completion

**Frequency and Connections Cultivate Attachment to Institution**

- Consecutive course-taking
- Networking provides career benefit, sense of community

**Membership Benefits Increase Student's ROI from Completed Courses**

- Career services help stay on track to goals
- Guide students to future enrollments

NYU SCPS
SCHOOL OF CONTINUING AND PROFESSIONAL STUDIES

Source: Education Advisory Board interviews and analysis.

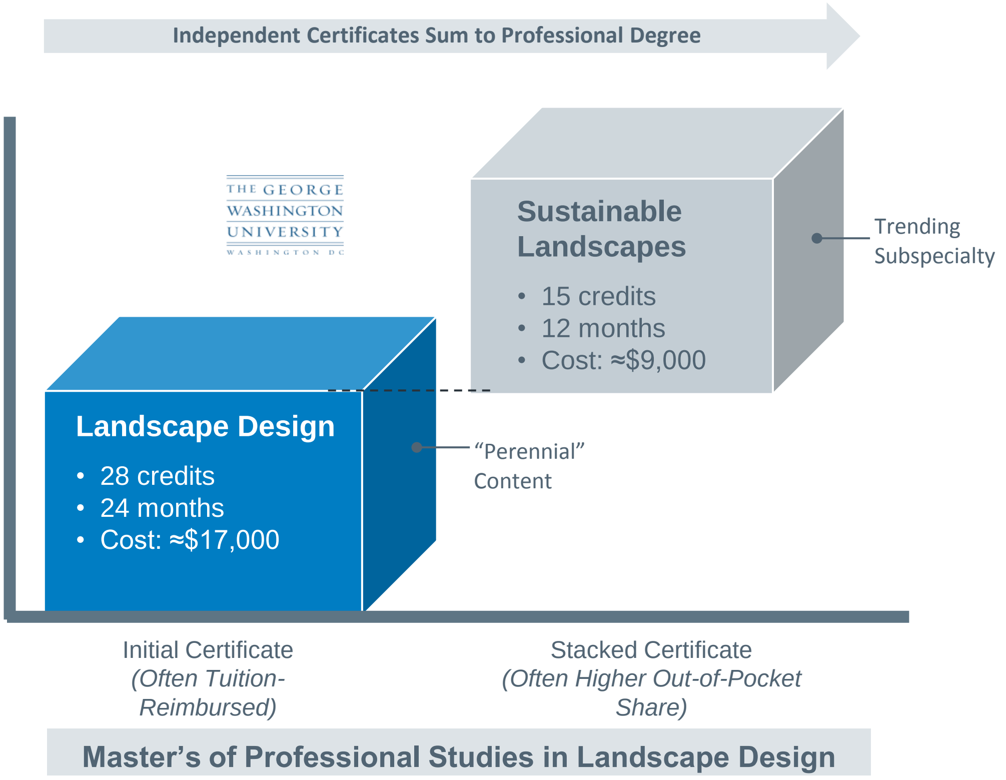
# Build-as-You-Go Credentials

NYU SCPS's loyalty club is designed to convert non-credit course takers to certificate students; in the credit realm, organizations similarly hope to increase conversion from certificate students to degrees. For these students, progressive institutions offer stackable certificates—for-credit certificates that, in combination, constitute a full degree while providing credentials en route.

The George Washington University segmented certificate material into perennial content (appeals to new entrants to the field, represents a larger commitment of time and money, is more likely eligible for tuition reimbursement) and trendy subspecialties (appeals to professionals already in the field, represents a smaller commitment, is more likely an out-of-pocket expense).

In so doing, GW created a product that appeals to all parties involved: students (who appreciate the intermediate credentials that make stop-and-start study appealing and who otherwise might have just left); employers (who find value in being able to more rapidly up-skill workers and stay abreast of new advancements in the field); and institutions (which can better reply to demand with a modular curriculum and can maximize seats filled).

## Modular Degree Structure Creates Value for Students, Employers and University



**Independent Certificates Sum to Professional Degree**

THE GEORGE WASHINGTON UNIVERSITY WASHINGTON DC

**Sustainable Landscapes**
- 15 credits
- 12 months
- Cost: ≈$9,000

Trending Subspecialty

**Landscape Design**
- 28 credits
- 24 months
- Cost: ≈$17,000

"Perennial" Content

Initial Certificate *(Often Tuition-Reimbursed)*

Stacked Certificate *(Often Higher Out-of-Pocket Share)*

**Master's of Professional Studies in Landscape Design**

## A Win-Win-Win Approach

1

### Value to Students

- Intermediate credentials sum to higher degree
- Easier for stop-and-start study

2

### Value to Employers

- Responsive to economic climate
- Company pays for rapid skills acquisition, student for long-term degree

3

### Value to Institution

- Modular curriculum "rotated out" as demand changes
- Dual audience (certificate and degree students) enables course size optimization

Source: The George Washington University College of Professional Studies, available at: http://cps.gwu.edu/, accessed June 10, 2010; Education Advisory Board interviews and analysis.

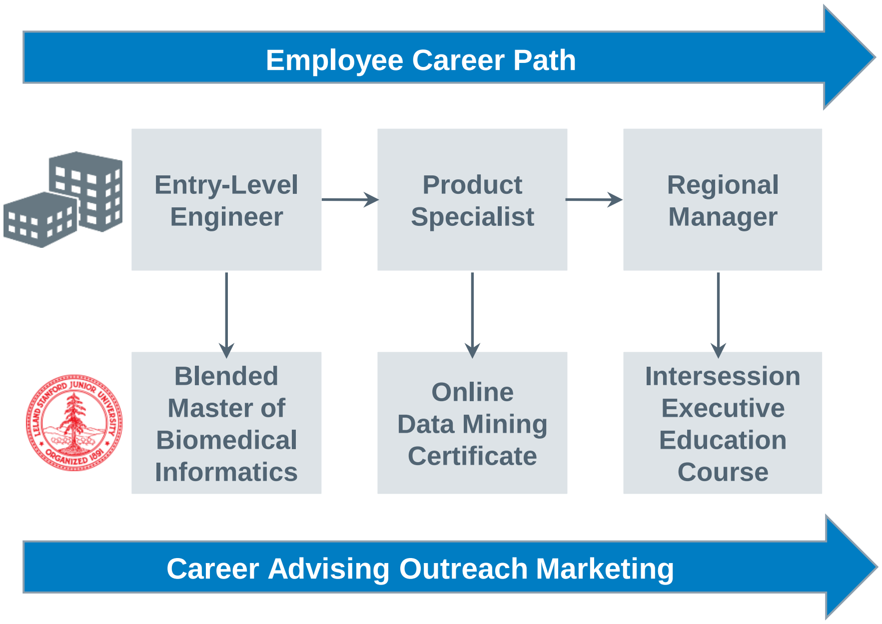
# Following Working Students Toward the Corner Office

Many institutions realize in theory, but have trouble operationalizing the fact that adults are more willing to return to school when they are confident it will help them reach their next professional goal on the career ladder. Stanford's Center for Professional Development worked closely with partner employers to develop a suite of educational products that mapped to employees' journey to the corner office. Stanford's selection of certificates and executive education courses nudge students up the career ladder: for example, entry-level employees who procured a promotion with the help of a Stanford master's degree will return several years later for another educational offering that's mapped to their next career step.

By providing students with an obvious reason to return, Stanford is able to capture a greater share of lifetime learning behavior among partner company employees. Coordinated career mapping can easily bring in 50% more revenue than a student's self-identified plan, which typically stops after the first step.

For another way of using employer connections, see Tool #8: Corporate Alumni Club Builder

## Stanford's Professional Development Road Map (Illustrative)



**Employee Career Path**

**Entry-Level Engineer** → **Product Specialist** → **Regional Manager**

**Blended Master of Biomedical Informatics**

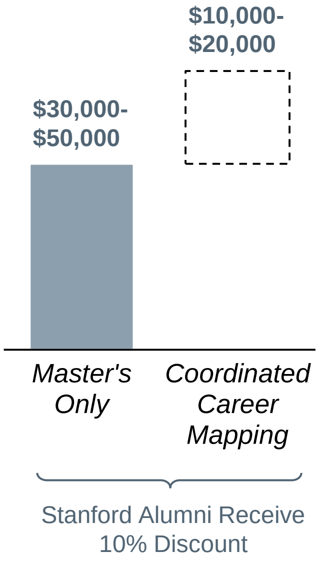
**Online Data Mining Certificate**

**Intersession Executive Education Course**

**Career Advising Outreach Marketing**

**Total Tuition per Student**

*(Illustrative)*



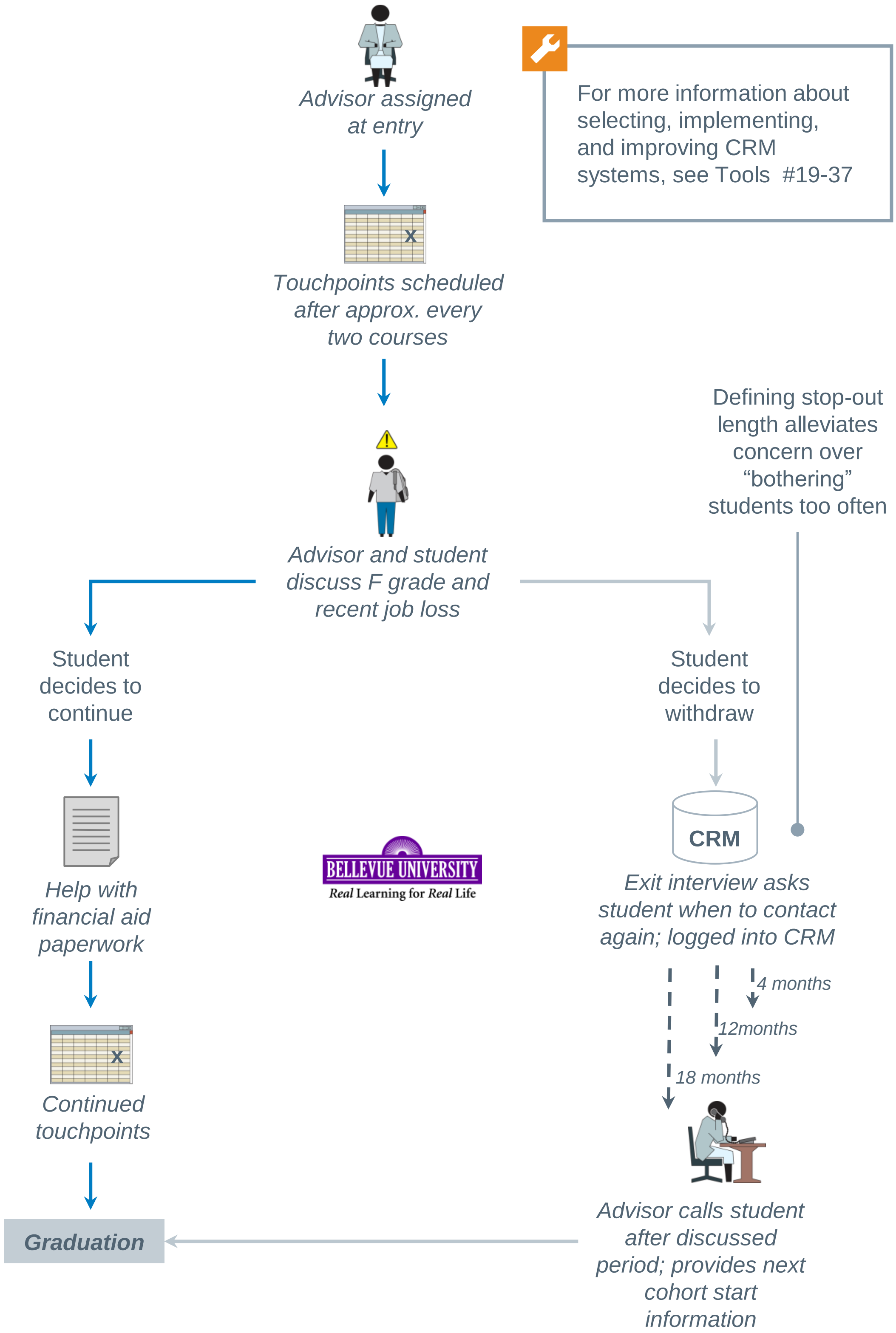
Source Stanford Center for Professional Development, available at: http://scpd.stanford.edu, accessed March 9, 2010;. : Education Advisory Board interviews and analysis.

# Getting Students’ Permission to Re-Approach

The unpredictable start-and-stop trajectory of many adults’ return to school poses a significant obstacle to marketers and recruiters trying to capture a greater share of lifelong learning purchases—or even encourage students to complete their initial program. Desiring to approach stop-outs to discuss reenrollment but worried about bothering them too early or often, Bellevue University struck upon the surprisingly simple practice of asking stop-outs, during an exit interview, when they would like to be contacted about continuing their program. Once re-approach information is logged in their CRM, advisors receive a timely reminder to initiate contact with students and provide them with relevant restart information. By asking for permissions, enrollment advisors are eliminating the hassle of chasing down stop-outs while also minimizing the risk of bothering students too often.

This practice can be similarly applied to encourage repeat behavior. Bellevue also collects information during their undergraduate exit interviews pertaining to anticipated graduate school plans and time frames. The data adds to the CRM system and then prompts graduate school recruiting staff to reach out at the appropriate time.

## Bellevue University’s Support Tracking System (Illustrative)



For more information about selecting, implementing, and improving CRM systems, see Tools #19-37

*Advisor assigned at entry*

*Touchpoints scheduled after approx. every two courses*

*Advisor and student discuss F grade and recent job loss*

Student decides to continue

*Help with financial aid paperwork*

*Continued touchpoints*

***Graduation***

Student decides to withdraw

Defining stop-out length alleviates concern over “bothering” students too often

*Exit interview asks student when to contact again; logged into CRM*

*Advisor calls student after discussed period; provides next cohort start information*

Source: Education Advisory Board interviews and analysis.

# Additional COE Forum Research on Managing Stop-Outs

For more breakthrough practices on managing adult student stop-outs, please access the COE Forum’s webconference, Engaging the Working Adult Student: Retention Disciplines for Continuing and Online Learners. The archived recording of the webconference can be found on the COE Forum’s website: eab.com/coe.

## 60-Minute Webconference Recording Available Online

**Engaging the Working Adult Student:**
***Retention Disciplines for Continuing and Online Learners***

This session profiles emerging strategies among continuing and professional education leaders for identifying and intervening with students at risk of dropping out, ensuring “no-hassle” re-enrollment, and fostering lifetime loyalty. We examine how leading COE organizations:

- Develop early-warning screening processes to focus interventions on students at the highest risk of dropping out
- Monitor signs of student financial distress for preemptive counseling
- Create effective, low-cost online advising and student support models

http://www.eab.com/Research-and-Insights/Continuing-and-Online-Education-Forum/Events/On-Demand-Webconferences/2011/Engaging-the-Working-Adult-Student

# Recapping Key Lessons

Recognizing that there are disparate available resources among institutions, and that many members must pursue excellence without more time, budget, or staff than they currently have, we have distinguished Quick-Win practices (those tactics requiring minor investment in time or resources and that are more likely to achieve fast results) from Long-Term Differentiators (tactics that are potentially transformational, but that are more speculative and/or require larger investments in technology, expertise, or cultural change).

For members unable to invest in Long-Term Differentiators immediately, we recommend that Quick Wins may help generate the resources needed to fund longer-term activities. We have arrayed our breakthrough practices along the spectrum here.

## Fostering Repeat Purchase Behavior

| | |
|---|---|
| #1 | Incorporate “students like you” course recommendations on each course webpage, using a no-algorithm-needed combination of already-existing course groupings and enrollment data |
| #2 | Design stackable credentials (i.e., multiple certificates summing to a degree) in order to provide students with an interim sense of progress as they make headway toward a degree |
| #3 | Create loyalty programs that provide financial and other incentives (e.g., special workshops) for students to pull forward courses and complete certificates in compressed amount of time |
| #4 | Hold exit interviews with stop-outs and recent or soon-to-be graduates, asking for the approximate time frame (and permission) to re-approach them about returning to complete their degree or start the next one |
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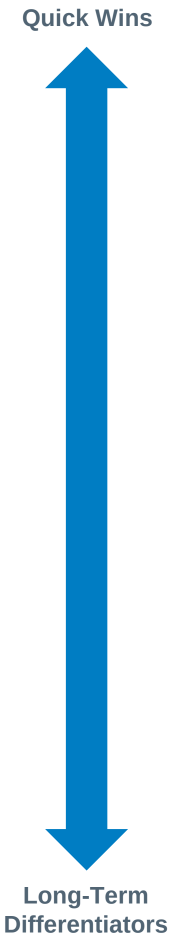
| #6 | Create alumni portals focused not only on obtaining employment, but also succeeding and advancing in one’s career; ensuring the portal is incorporated into daily life will keep the institution “top of mind” when alumni are ready for their next educational step, with taster courses embedded in the portal to aid with the decision |



# Rewarding Word-of-Mouth Referrals

## Incentivizing Current and Former Students to Pass Quality Leads

# Key Insights

## *How Do We Reward Word-of-Mouth Referrals?*
## *Incentivizing Current and Former Students to Pass Quality Leads*

1. **Word-of-Mouth Already a Top Referral Source, Organically—What if We Actually Tried?** Many COE units are finding "word of mouth" to be a top factor in motivating inquiries and enrollments even without any real investments to date; breakthrough institutions are building upon what was once merely ad hoc, creating new incentives and follow-up mechanisms to increase enrollments through referrals.

### Breakthrough Practices

2. **Raise Referrers' Social Capital by Providing Interesting or Useful Information to Forward to Friends:** Use "infotainment" (fun, personalized video; industry news) to encourage cold leads and current prospects to forward content to friends; the key is that the original recipient feels their reputation is boosted by sending enjoyable videos or emails to their network.

3. **Use Physical Gifts to Provide Campus Feel for Online Students:** Mail a low-cost physical memento to congratulate online degree alumni, including transferrable next-course-free vouchers they can use for their next degree or as a "gift" to a friend.

4. **Develop Easy-Ask Mechanisms for Course Testimonials:** Ask students to provide course ratings and testimonials when they're especially receptive (e.g., just completed a course, submitting a grade request); make submission as easy as possible by embedding the request as a "pop up" on the website that the student is already on, with no extra navigation needed.

5. **Select Dedicated Leads-Passing Alumni:** Recruit a committed corps of alumni who receive training and a small incentive to pass qualified leads to your institution, with follow-up from university staff.

6. **Provide Incentives for Most-Networked and Motivated Leads-Passers:** Develop a tiered structure with VIP benefits to incentivize the most-networked and motivated alumni referral scouts to pass more leads; share top referral success stories with larger group to provide aspirational role models and share best practices.

# Amplifying Word-of-Mouth

The following pages discuss strategies for amplifying word-of-mouth marketing. Many would point out that social media is word-of-mouth at scale. While undeniably true, the topic of how best to tap into social media is not included in the scope of this breakthrough-practice study. Instead, social media is exclusively addressed in a study of its own. Members have unlimited access to the COE Forum's study, *Disciplining Social Media Strategy: Reducing Acquisition Costs and Increasing Student Engagement in Continuing, Professional, and Online Education*. Please contact your Dedicated Advisor or visit www.eab.com/coe to place a hardcopy order or access an electronic version.

## Access Our Completed Social Media Work

**Disciplining Social Media Strategy:**
*Reducing Acquisition Costs and Increasing Student Engagement in Continuing, Professional, and Online Education*

**Key Questions Answered:**

- How do we tap into external social media networks to generate leads without being seen as an unwelcome sales interruption?
- What types of social media content are truly differentiating to adult and online students?
- How can social media help us maintain momentum with international applicants?
- What are the critical factors for creating social communities that are attractive to working adult students?
- How can we scale social media activity without adding staff?

**Contact your Dedicated Advisor for hardcopies or visit www.eab.com/coe for an electronic version**

# Taking (Another) Page from Amazon

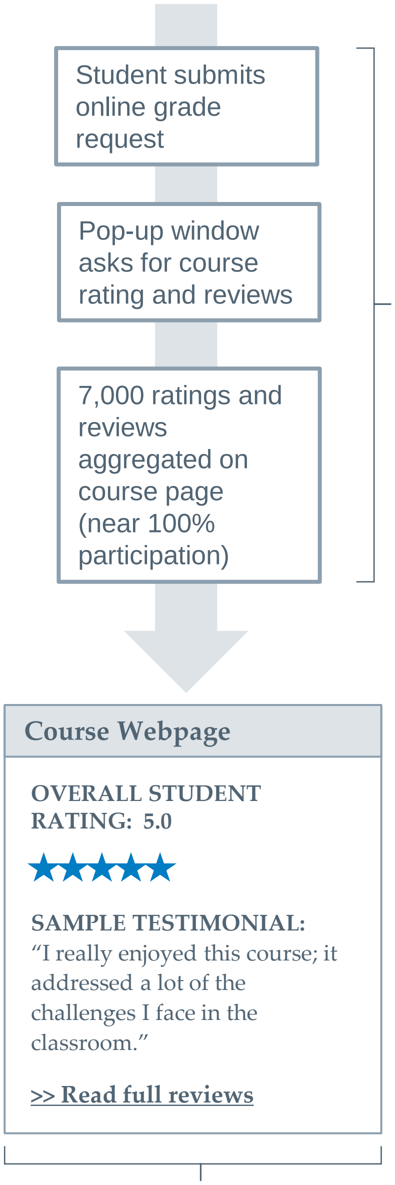
Product testimonials, ubiquitous in other e-commerce arenas, are powerful word-of-mouth tools that are still finding their place in the continuing, online, and professional education space. Overstretched staff struggle to find the time needed to identify good candidates and follow up to gather and compile robust testimonials.

Realizing the value of a large collection of short reviews, Fresno Pacific University's Continuing Education unit developed a low-effort method of supplementing each course's webpage with dozens of relevant, student-submitted reviews. They first ask departing students to supply a short review and rating of their course. By making this ask at the moment students request their grades (needed to get professional development credit from their employers) Fresno Pacific is drawing on a moment of goodwill, and students are especially willing to oblige since the time commitment is minimal. This combined with the convenience of a pop-up form, which requires no external navigation, has earned Fresno Pacific a nearly 100% participation rate and a repository of over 7,000 reviews and ratings. Once organized, course-specific composite star ratings and reviews are added to each course's webpage.

## Fresno Pacific University's Course Testimonial Prompts

FRESNO PACIFIC UNIVERSITY

### Nudging Students When Most Receptive



Student submits online grade request

Pop-up window asks for course rating and reviews

7,000 ratings and reviews aggregated on course page (near 100% participation)

**Course Webpage**

**OVERALL STUDENT RATING: 5.0**

★★★★★

**SAMPLE TESTIMONIAL:**
"I really enjoyed this course; it addressed a lot of the challenges I face in the classroom."

**>> Read full reviews**

- ***Convenience—*** Students already on website
- ***Capitalize on Moment of Goodwill—*** Course grade will help with student's salary or job advancement

- Reviews overwhelmingly positive, but inappropriate posts edited
- Compounding effect—volume of reviews compensates for brevity

For a replica of the pop-up form used to request a course review and rating, see Tool #11: Course Star Rating Feedback Form

Source: Education Advisory Board interviews and analysis

Contacts at Fresno Pacific report that the overwhelmingly positive nature of the vast majority of reviews, plus a policy of editing any reviews that are overly personal, assuaged faculty misgivings about public reviews. Faculty soon come to realize what one contact pointed out: when a prospective student doesn't have a direct connection to a past purchaser (or former student), opinions from individuals in the same field (with similar backgrounds, professional development needs, and expectations) are the next best source of information.

### A Community That Trusts One Another

"When you don't have a friend who has already taken a class with us, the course reviews are your word of mouth. At least the reviewers are all in the K-12 education community."

*Matt Gehrett, Executive Director,*
*Continuing Education*
*Fresno Pacific University*

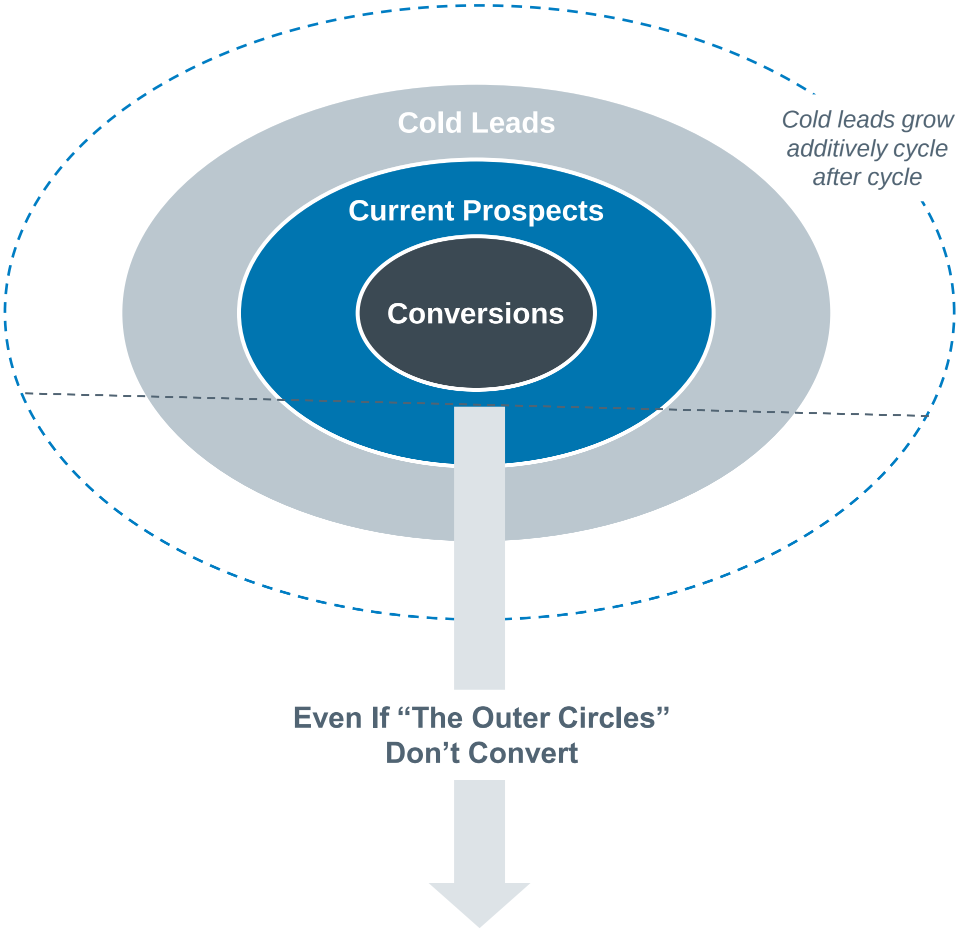
Source: Education Advisory Board interviews and analysis

# Getting Help Beyond Your Inner Circle

All too often marketing leaders focus all their attention on active prospects—admittedly, these individuals are most likely to progress through the enrollment funnel and make a positive impact on the unit's bottom line. However, ignoring the cold leads that grow additively cycle after cycle is a costly mistake. A small percentage of them will enroll months and years later, but more importantly, those cold leads initially inquired because of a positive association with the institution and they also have a strong network of "people like them." They are, in short, well positioned to be natural advocates for the institution if only they are provided the appropriate prompts and resources.

For examples of ways of encouraging your outer circles to be your advocate, see Tool # 7: Tell-a-Friend Email Campaigns Tool and Tool #15: Cold Lead Email Preference Template

## Unexpected Value from the Largest Segment of Your Database



**Even If "The Outer Circles" Don't Convert**

- May enroll at a later date
- Positive associations led to initial inquiry
- ***Strong network of people like them"***

Source: Education Advisory Board interviews and analysis

# Giving Your Outer Circle Something to Talk About

Two institutions have developed methods of encouraging their broader lead base to serve as advocates. First, Cal Poly San Luis Obispo crafted a customizable video, which it then sent to its top applicants (incorporating their name throughout the video) along with the prompt to customize the video for a friend. Half of the initial recipients forward it to a friend, and half of those friends apply.

Second, Embry Riddle Aeronautical University Worldwide created advocates from its cold lead database, a group whose sweet spot on the spectrum between over-contacting and neglect is particularly difficult to find. ERAU sends cold leads monthly emails that focus on "newsy" information like program launches and industry collaborations—conveniently, all content that is recycled from marketing. Contacts were surprised to find that 30% of cold leads forward these monthly emails on, double the open rate at most institutions.

We feel that the key to encouraging advocacy is making content easy to share and value-added for the recipient, apart from any sales content (and therefore something constituents feel good about sharing).

## Tell-a-Friend Infotainment Messaging

### Personalized Videos

*Video to top applicants includes recipient's name throughout video*

**SEND TO A FRIEND**

From: katiesue@email.com
Subject: Cal Poly Made a Video Just For You

Hi Karishma,

Katie Sue thought you would like to see what makes Cal Poly the right college choice for you.

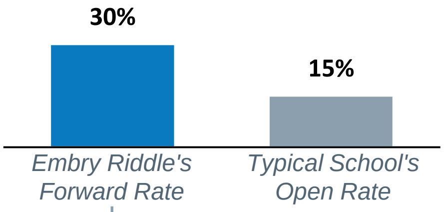
50% Forward to a Friend

50% Friends Apply[1]

### Industry News Emails

**EMBRY-RIDDLE** Aeronautical University WORLDWIDE

- Monthly emails to cold leads database (program launches, industry collaborations)
- Content recycled from marketing



**Twice as Many *Forward* Embry Riddle Emails Than Even *Open* Most Emails**

### Why Forward to A Friend?

- "Infotainment"—Content is enjoyable and/or useful, separate from any marketing message
- Easy as Possible—One quick link
- Feel Like You're Doing a Good Deed (Not Sending Spam)

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1) Though it is hard to know how many would have applied, the video helped cement the loyalty of a promising prospect base, since top applicants likely know other top applicants

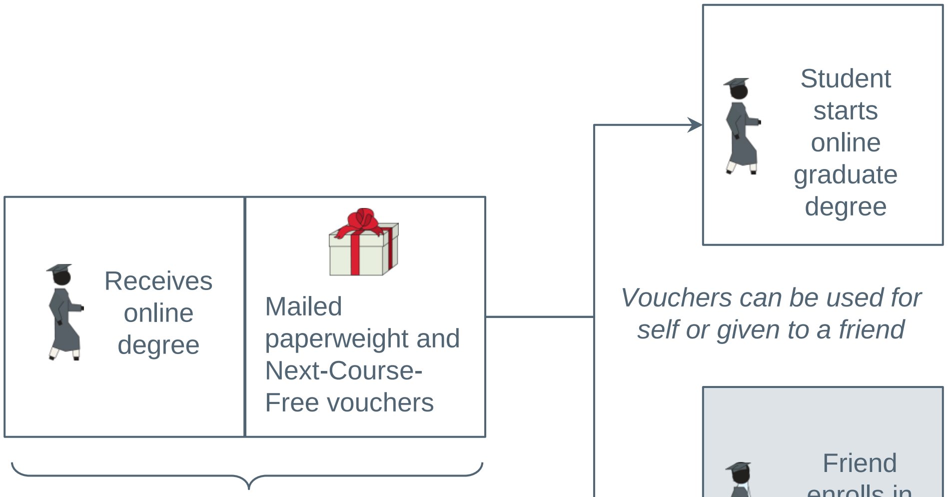
Source: Education Advisory Board interviews and analysis

# A Gift You Can Pass Along to a Friend

Although certainly an improvement on many word-of-mouth marketing tactics, providing leads—cold and otherwise—with "infotainment" is still a largely passive strategy. The University of Alabama's Continuing Studies unit took a more active approach with a group of students who were likely to give the institution a resounding endorsement. The University of Alabama encouraged and enabled such an endorsement by sending online degree students a gift at a particularly high-impact moment: soon after they graduated. The gift, a small lacquered box containing a marble paperweight inscribed with the student's name and graduation specifics, a congratulatory note from the dean, and free course vouchers, provides online students with the sort of token they might have been able to pick out at the campus bookstore.

The free course vouchers, perhaps the smallest physical component of the gift, are actually a powerful word-of-mouth generator. Online graduates are entitled to keep the voucher for themselves and use it toward another online degree program, or they can re-gift the voucher to a friend or family member. The "good Samaritan" aspect of sharing with friends and family a potentially life-changing educational gift is a powerful driver behind the campaign.

## University of Alabama Continuing Studies' Transferrable Free Course Vouchers



Receives online degree

Mailed paperweight and Next-Course-Free vouchers

Student starts online graduate degree

*Vouchers can be used for self or given to a friend*

Friend enrolls in online program

- **High Impact Moment**—New grad especially attached, memento provides "campus feel" for distance student
- **Physical Voucher Emphasizes Giving**—You're helping friend (not institution) by passing voucher along

For a replica of the gift and free course vouchers, see Tool #10: Anatomy of a WOM-Building Gift

Source: Education Advisory Board interviews and analysis

# Building Up Steam

Continuing Studies at the University of Alabama is starting to see just how a powerful their transferrable course discounts have been in their first year of implementation. The campaign was fairly low risk as the vast majority of its cost, the discount, is focused on enrollees as opposed to diffused across a wide swath of leads, almost all of whom will drop out of the funnel. (As the vouchers are fulfilled entirely in-house, the production and logistical costs are negligible.) As of late 2012, less than a year after its launch, the transferrable course vouchers have yielded 20 new enrollments—with more coming in every week. Given the cost of an online degree program, this generates the unit several hundred thousand dollars in additional tuition revenue each year. Finally, contacts saw another promising indicator: referred students were joining online programs from New York, Ohio, and Pennsylvania, all well beyond Alabama's Continuing Studies' typical online catchment area.

Contacts look forward to watching the transferrable free course voucher initiative grow appreciably in the upcoming year.

## Promising Results from the First-Year of Implementation

### Focusing Spending on Enrollees, Not Leads

Operating Costs

Administrative…..negligible

Fulfillment…..…..negligible

Discount…….…....$1,000/ enrollee

Bulk of cost is spent on enrollee, not diffused across leads, 80%+ of whom will drop out of funnel

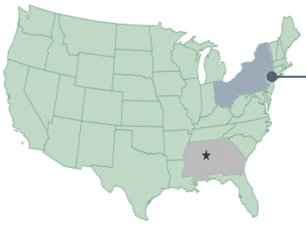
### Impressive ROI

**20** enrollments

✖ **$11K- $37K** per enrollment

**$220K-$740K**
**annual tuition income**

### Increased Reach



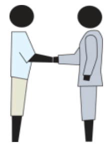
- Enrollments from NY, OH, PA—well beyond typical online catchment area
- Anticipate that at maturity (in ≈1 year) enrollments will increase significantly

Source: Education Advisory Board interviews and analysis

# Even Most Positive Recommendations Often Ephemeral

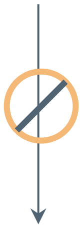
The unfortunate reality of positive recommendations is that they are susceptible to lack of follow-through—particularly as enthusiasm from either party involved inevitably wanes. Without a follow-up touch point, referred prospects could lose interest in or forget about the program, have questions that the referrer cannot answer, or be neglected by a referrer who doesn't have enough time or motivation to nurture the lead.

**Strong Initial Enthusiasm**



Alumni transfers enthusiasm about alma mater to an acquaintance

Acquaintance is momentarily enthusiastic about the prospect of enrolling



**But Without Follow-Up, Peters Out Over Time**

- Acquaintance isn't confident she wants to enroll immediately
- Forgets the program name
- Alumnus doesn't have the time to follow-up
- Alumnus isn't comfortable pestering weak-tie connection
- Even if they speak about program again, alumni lacking answers

Source: Education Advisory Board interviews and analysis

# Alumni Referral Scouts

Lesley University put in place an alumni referral program for its master's and certificate programs targeted to K-12 educators that limits the guesswork and missed opportunities that commonly plague alumni referral programs by offering clear incentives to an official group of referral scouts, limiting its pool of referral scouts to the most committed, and offering local support to help scouts pass along quality leads.

When Lesley's flagship teacher training programs, ground-based cohort programs located across the country, faced increasing competition from for-profit and online institutions, Lesley leaders mobilized a word-of-mouth machine—Lesley alumni—using a small incentive paid to alumni per lead passed to the recruiting office. By closing the loop between referrer, referee, and university, Lesley ensures that leads don't fall through the cracks. By setting up reasonable barriers to entry, Lesley ensures that only committed alumni who will be able to find their own opportunities and quality leads participate with minimal support from Lesley's regional recruitment structure.

## Grassroots Team Identifies Promising Leads for Institutional Follow-Up

**Small, but Meaningful, Incentive for Alumni**

- $30 for all leads passed by official alumni referral scouts to admissions counselors
- Payment after counselor has a conversation with lead (but before application or enrollment)
- Inquiry form with prospect's name, phone, and email

**"Barriers to Entry" Ensure Only Committed Participants**

- Short application asks about involvement with community organizations
- Minimum average of five inquiries per month

**Expected to Find Their Own Opportunities**

- Talking points and training modules for support and quality control
- Alumni referral scouts select own venues (e.g., teachers lounges, listservs, nearby schools)

For a replica of the referral scout application form, see Tool #9: Alumni Leads Passer Sign-Up Form

Source: Education Advisory Board interviews and analysis

# The Mary Kay Pink Cadillac

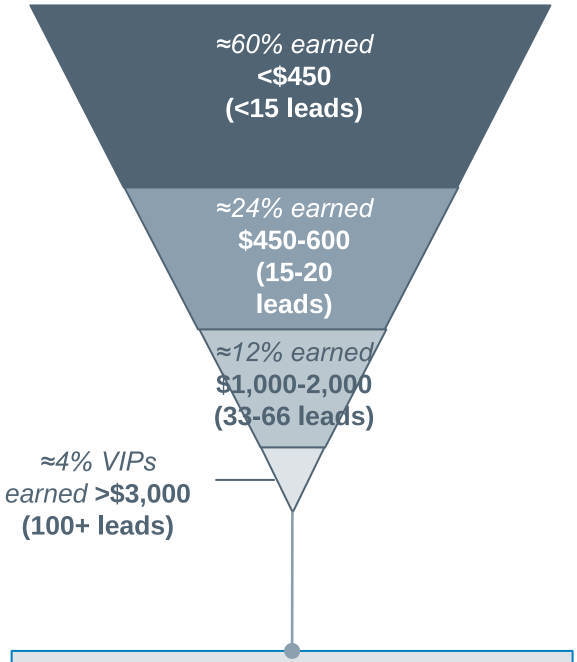
With tiered awards and opportunities, Lesley University rewards alumni referral scouts based on their level of activity. And like sell-from-your-home cosmetic company Mary Kay, which gives a pink Cadillac to its top sales people, Lesley's rewards its top lead passers with recognition, professional development opportunities, and monetary perks.

A small percentage of alumni could be considered VIP referral scouts, having passed over 100 leads in two years.
To encourage these VIP leads passers to continue their performance (and to help other, aspiring scouts see the benefits of high-volume leads passing), VIPs receive special incentives such as the option to serve as a paid site liaison in regions where the alumni has generated enough leads for a full cohort of students to begin a program. In this role, alumni further serve as an ambassador, making sure the logistics of the site-based teacher training programs run smoothly. Finally, via email newsletters and events, Lesley publicizes the success of the VIPs, thereby encouraging novice leads passers to strategize about reaching maximum prospects and to follow through by submitting contact information from all interested prospects to the recruitment office

## Extra Incentives for the Head of the Class

### Tiers of Participation

150 Alumni Leads Passers Over Two Years



*≈60% earned*
**<$450**
**(<15 leads)**

*≈24% earned*
**$450-600**
**(15-20 leads)**

*≈12% earned*
**$1,000-2,000**
**(33-66 leads)**

*≈4% VIPs*
*earned* **>$3,000**
**(100+ leads)**

### Structuring VIP Incentives

1. **First Pick for Professional Development Opportunities**
*Invited to attend conferences when staff unable to travel*

2. **Exclusive Paid Opportunities**
*Leads-passer offered site liaison position ($2,200) after generating full cohort (15-20 enrollees)*

3. **Modeling Success for Peers**
*Public recognition of VIPs helps others see high volumes possible*

Source: Education Advisory Board interviews and analysis

# Reducing Costs, Increasing Conversions

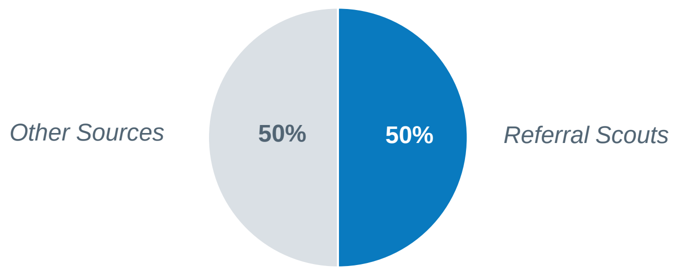
After only two years, Lesley's alumni referral scouts serve as its top source of new leads and generate leads at roughly half the cost of traditional lead e-sources such as lead generator websites.

Even more encouraging, the power of word-of-mouth advertising extends beyond the initial recruitment phase: the trust established by the referral scout-prospect interaction and the due diligence exercised in identifying leads genuinely interested in returning to school fuels a higher conversion rate than any other source of leads. Leads passed by referral scout convert to enrolled students at a rate of 24%, almost double the 14% conversion rate for prospects from other leads sources who *also* speak to a recruitment counselor over the phone. The numbers show that an in-person conversation with a program alumnus paves a much surer road to conversion from lead to new student.

## Maintaining Market Share Despite Pressures from New Online Competitors

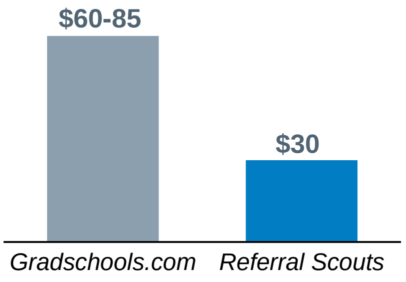
***Top Lead Source…***

**Source of Leads, FY 2012**



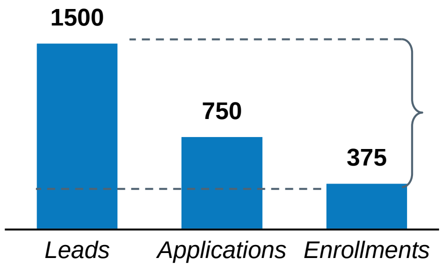
***…At Lower Cost…***

**Cost of a Qualified Lead**



***…And Higher Conversion***

**FY 2012 Conversions**



24% conversion compared to 14% for other leads reached via phone

Source: Education Advisory Board interviews and analysis

Several important factors must be taken into consideration before adopting Lesley's alumni field recruiters tactic. Some institutions harbor understandable reservations about cash incentives. Speak to your legal team about the limitations of cash incentives and ask alumni advisors about the incentives they prefer (e.g., sporting or arts events discounts or non-credit course vouchers).

Additionally, note that Lesley University's incentive program benefited from an ideal target prospective student audience: current teachers interested upskilling. The target audience makes alumni leads passers and prospective students easy to identify. When adapting this tactic to other programs, consider ways to identify leads passers who are responsible and savvy enough to identify prospective students and then discern between the interested and uninterested. Require leads passers to complete an application and cite their community involvement. Similarly, roll out leads passers incentives only for programs where prospective students are easy to identify—typically programs for career advancers (e.g., engineering management or nursing management).

***Implementation Considerations***

| | |
|---|---|
| #1 | **What alternatives to cash incentives would motivate alumni?**<br>Discounts to future non-credit courses, campus store gift cards |
| #2 | **What qualifications must a lead meet to receive the incentive?**<br>Based on student qualifications (e.g., meeting admissions standards) or motivation (e.g., completes application) |
| #3 | **In what types of fields are alumni leads-passing incentives likely to be most successful?**<br>Easiest to identify good fit in highly technical professions or those targeting career advancers (rather than career changers) |

Source: Education Advisory Board interviews and analysis

# Imagine the Potential

Word-of-mouth's referral potential merits new consideration in light of the previous tactics that have been put into practice by innovative continuing, online, and professional education marketing leaders. When pursued intentionally, these strategies are marketing game changers, capable of sustainably and significantly lowering cost of acquisition.

## Re-visited Musings on the Untapped Power of Word of Mouth

**In Spite of Ourselves…**

"When you look at number of leads, cost per lead, conversion rates, it's hard to beat the power of word-of-mouth…but that's all really happened in spite of ourselves, not due to any strategy or investment. Imagine what our enrollments and costs could look like if we actually tried to spend more time and effort on word-of-mouth marketing."

*Dean of Continuing Education*
*Private Research University*

Source: Education Advisory Board interviews and analysis

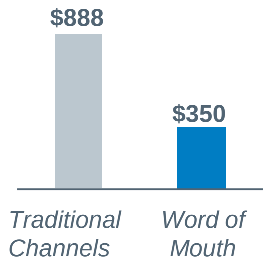
# We Did Imagine It

A pro forma evaluation of the improved economies of scale of word-of-mouth is particularly revealing. Predicated on the sizable difference in media spend per enrollment sourced from traditional channels versus enrollments sourced from word-of-mouth, a sensitivity analysis examining marketing cost avoidance as word-of-mouth enrollments growth reveals that tens of thousands of dollars are at stake. Add to that the industry-proven fact that referred customers, who typically demonstrate better "fit" with the organization than non-referred customers, show greater lifetime value, and investment in this marketing activity becomes all but inarguable.

## Envisioning the High ROI of Word of Mouth at Scale

### Estimating Marketing Cost Savings Based on Enrollment and Word-of-Mouth

*Media Spend per Enrollment*
*(Representative)*



*Enrollment and Word-of-Mouth Growth Sensitivity Analysis*

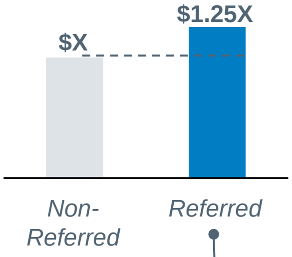
| % Enrollments Due to WOM | Percent Annual New Enrollments | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | 5% | 8% | 11% | 14% | 17% | 20% | 23% | 26% |
| 48% | 109K | 117K | 120K | 124K | 127K | 130K | 133K | 137K |
| 45% | 102K | 110K | 113K | 116K | 119K | 122K | 125K | 128K |
| 42% | 95K | 102K | 105K | 108K | 111K | 114K | 117K | 120K |
| 39% | 88K | 95K | 98K | 100K | 103K | 106K | 108K | 111K |
| 36% | 82K | 88K | 90K | 93K | 95K | 98K | 100K | 102K |
| 33% | 75K | 81K | 83K | 85K | 87K | 89K | 92K | 94K |
| 30% | Today | 73K | 75K | 77K | 79K | 81K | 83K | 85K |

Realistic marketing cost avoidance

Best-state marketing cost avoidance

### Greater Value Post-Enrollment

*Customer Lifetime Value*
*(Banking)*



Referred customers more likely to become repeat customers

Source: Education Advisory Board interviews and analysis.

# Recapping Key Lessons

Recognizing the disparate available resources among institutions, and the fact that many members must pursue excellence without more time, budget, or staff than they currently have, we have distinguished Quick-Win practices (those tactics requiring minor investment in time or resources and that are more likely to achieve fast results) from Long-Term Differentiators (tactics that are potentially transformational, but that are more speculative and/or require larger investments in technology, expertise, or cultural change).

For members unable to invest in Long-Term Differentiators immediately, we recommend that Quick Wins may help generate the resources needed to fund longer-term activities. We have arrayed our breakthrough practices along the spectrum here.

## Rewarding Word-of-Mouth Referrals

| | |
|---|---|
| #1 | Use “infotainment” (fun, personalized video; industry news) to encourage cold leads and current prospects to forward content to friends; key is that original recipient feels reputation boosted by sending enjoyable videos or emails to network |
| #2 | Mail a low-cost physical memento to congratulate online degree alumni, including transferrable next-course-free vouchers they can use for their next degree or as a “gift” to a friend |
| #3 | Ask students to provide course ratings and testimonials when they’re especially receptive (e.g., just completed a course, submitting a grade request); make submission as easy as possible by embedding request as “pop up” on website student is already on, with no extra navigation needed |
| #4 | Recruit a committed corps of alumni who receive training and a small incentive to pass leads to your institution, with follow-up from university staff |
| #5 | Develop a tiered structure with VIP benefits to incentivize the most-networked and motivated alumni referral scouts to pass more leads; share top referral success stories with larger group to provide aspirational role models and share best practices |

# Recapping Key Lessons

This breakthrough practice study focused on marketing strategies most likely to see success in light of consumer-students' "Search and Shop" tendencies and reveals three actionable key lessons. First, marketing leaders should amplify value delivered during the search process by repositioning communications around life and career change choices as opposed to transactional program details. Second, leaders should increase share of students' lifetime learning habits by crafting incentives for pulling forward and repeating purchases. Finally, marketers should leverage the untapped potential of word-of-mouth referrals by deploying incentives that turn their student and prospect networks into advocates for the institution.

## Reaching "Search and Shop" Students

**Top Three Takeaways**

1 Reposition program communications and prospect conversations around holistic career choices, rather than program details

2 Increase share of student by creating incentives for pulling forward and repeating purchases

3 Create non-cash currencies to promote word-of-mouth referrals

Source: Education Advisory Board interviews and analysis

# Customer Relationship Management

## Implementation Toolkit

# Toolkit Table of Contents

The COE Forum developed the suite of tools and resources below to help members design new processes and content for improving communications with prospects. Our first set of tools, dedicated to Creating Targeted Prospect Communications, can be used to help organizations enhance their prospective student relationships irrespective of whether they are using a CRM system. Additionally, for members who are looking to accelerate the implementation – and/or increase the adoption – of CRM systems, we have also included a second set of tools on Maximizing CRM Software Benefits.

## *I. CREATING TARGETED PROSPECT COMMUNICATIONS*

### Making the Most of Scarce Recruiter Time

### Involving Staff in Marketing Content Creation

### Fostering Word-of-Mouth Referrals

### Developing a Customer Segmentation Strategy

# Toolkit Table of Contents (cont.)

*II. MAXIMIZING CRM SOFTWARE BENEFITS*

Aligning CRM with Business Needs

Selecting a Vendor

Driving Change Management Across the Organization

Creating Specialized CRM Roles

Assessing and Correcting CRM

# Tool #1: Buying Cycle-Based Lead Nurturing Map

Crafting communications material suited to prospects' changing needs and expectations as they move through the funnel is a highly effective way of keeping leads engaged. However, most recruiting units—either unaware of the value of this strategy or wary of how work intensive it seems—fail to adapt content to meet evolving needs and instead use easier-to-make one-size-fits-all communications across the funnel.

The Buying-Cycle-Based Lead Nurturing Map will help you develop lead-nurturing content that better meets leads' desires as they progress through the funnel. A collection of worksheets will help staff start brainstorming on the same topic. Subsequent COE Forum research will collect additional guidelines and examples of effective online content creation.

**Implementation Note:** Though it can be difficult to accomplish, collaboration between marketing and academic subject matter experts yields the highest quality communications material. This tool can facilitate such collaborations by providing a checklist of communications materials to which subject matter experts are best suited to contribute, while leaving the branding and strategy components to marketing.

| Stage in the Funnel | Place in Buying Cycle | Preferred Messaging | Targeted Content Checklist |
|---|---|---|---|
| **Prospect:**<br>• Initiated contact (email, phone call, inquiry form, visit)<br>• Was referred by someone else<br>• Visited website and explored net price calculator and/or other tools<br>• Sent standardized test scores | Interested<br>Researching<br>Considering | High-level educational information | **Emails covering:**<br>☐ How to complete the application & FAFSA<br>☐ FAQ<br>☐ Testimonials & outcomes<br>☐ Financial aid<br>☐ Faculty profiles<br>☐ Curriculum |
| • Stopped responding to email/calls<br>• Completed one or some of the above actions but stalled | Anxious | Specific, program-level information | **Emails, scripts/talking points for conversations & live chats, in-person event agendas covering:**<br>☐ Testimonials<br>☐ Career outcomes<br>☐ Faculty profiles |
| **Application in Progress:**<br>• Started an application | Anxious | Reassurance and reminders | **Emails, scripts/talking points for conversations & live chats covering:**<br>☐ Outcomes<br>☐ Expectations<br>☐ Deadlines |
| **Applicant:**<br>• Completed application | | | **Emails, scripts/talking points for conversations & events covering:**<br>☐ Outcomes<br>☐ Expectations |
| **Enrolled** | | | |

## Worksheet: Nurturing Leads by Position in Buying Cycle

The following collection of worksheets should be used to foster discussion on how prospects' informational needs evolve as they move through the funnel. Each worksheet features a hypothetical student profile including the program being considered (use programs in your own profile to make this exercise maximally applicable), work-life balance specifics, and educational history. Staff can work through their worksheets independently or in small group form.

### Group A

*Hypothetical Prospective Student*

### Prospective Student Characteristics

- Considering an Online Professional Certificate in Water Management and Landscape Sustainability or ___________________________________ (from your portfolio)
- Early in the decision-making process, still searching several other programs
- Employed full-time; has a family with two children
- Graduated from a four-year university

### Brainstorm Instructions

Identify your prospective student's stage in the funnel and write it here:

____________________

Complete the table below, identifying prospective students' probable questions, concerns, and expectations.

### Anticipated Prospective Student Needs

*Consider the Questions, Concerns, Expectations Communications Plans Should Address*

| | **Brainstormed Prospect Needs** |
|---|---|
| | *Enter Your Responses Below* |
| **Questions** | |
| **Concerns** | |
| **Expectations (For Curriculum, Student Services, or Otherwise)** | |

## Worksheet: Nurturing Leads by Position in Buying Cycle

### Group B

*Hypothetical Prospective Student*

### Prospective Student Characteristics

- Considering a classroom-based Professional Certificate in Digital and Social Media or ___________________________________ (from your portfolio)
- Submitted an inquiry three weeks ago; hasn't done anything since
- Employed part-time
- Graduated from a four-year university

### Brainstorm Instructions

Identify your prospective student's stage in the funnel and write it here:

____________________

Complete the table below, identifying prospective students' probable questions, concerns, and expectations.

### Anticipated Prospective Student Needs

*Consider the Questions, Concerns, Expectations Communications Plans Should Address*

| | **Brainstormed Prospect Needs** |
|---|---|
| | *Enter Your Responses Below* |
| **Questions** | |
| **Concerns** | |
| **Expectations (For Curriculum, Student Services, or Otherwise)** | |

## Worksheet: Nurturing Leads by Position in Buying Cycle

### Group C

*Hypothetical Prospective Student*

### Prospective Student Characteristics

- Considering an Online Master of Arts in Educational Technology or ___________________________________ (from your portfolio)
- Began application but has not submitted application yet; no activity in application or communication with the recruitment team in 15 days
- Employed full-time; in late 20's or early 30's and without children
- Graduated from a four-year university

### Brainstorm Instructions

Identify your prospective student's stage in the funnel and write it here:

____________________

Complete the table below, identifying prospective students' probable questions, concerns, and expectations.

### Anticipated Prospective Student Needs

*Consider the Questions, Concerns, Expectations Communications Plans Should Address*

| | **Brainstormed Prospect Needs** |
|---|---|
| | *Enter Your Responses Below* |
| **Questions** | |
| **Concerns** | |
| **Expectations (For Curriculum, Student Services, or Otherwise)** | |

# Tool #1: Buying Cycle-Based Lead Nurturing Map (cont.)

## Worksheet: Nurturing Leads by Position in Buying Cycle

### Group D

*Hypothetical*
*Prospective Student*

### Prospective Student Characteristics

- Considering American Language Institute or ___________________________________ (from your portfolio)
- Has applied and been accepted to ALI but has not yet submitted deposit or enrolled
- 19-year old student from Czech Republic who is interested in completing a BA or BS at an American University
- Graduated with honors from local secondary school; has completed no college-level, transferrable coursework

### Brainstorm Instructions

Identify your prospective student's stage in the funnel and write it here:

____________________

Complete the table below, identifying prospective students' probable questions, concerns, and expectations.

### Anticipated Prospective Student Needs

*Consider the Questions, Concerns, Expectations Communications Plans Should Address*

| | **Brainstormed Prospect Needs** |
|---|---|
| | *Enter Your Responses Below* |
| **Questions** | |
| **Concerns** | |
| **Expectations (For Curriculum, Student Services, or Otherwise)** | |

# Tool #2: Guidelines for When to Call a Prospect

Phone outreach is an important part of personalized recruitment of adult learners but also requires significant staff time. This tool outlines action-based guidelines that recruitment counselors can use as they decide when to call prospective students. The guidelines can be adapted based on the staff time and resources at a unit's disposal.

**Outreach Priority** →

Email Activity

**Follows a link**

Prospect is reading emails and following links but may not be comfortable obtaining all information electronically. Call when staff capacity allows.

**Forwards an email**

Prospect is so interested in content of emails that he or she forwards email to a friend. If possible, contact prospect by phone.

**Responds to an email**

Prospect actively reaches out to recruitment staff and may have questions that can best be addressed over phone.

Website Activity

**Visits Website Five Times within a Few Days**

Prospect seeks out passive content but does not "raise hand" (e.g., email question, register for events). Call with encouragement if staff capacity allows.

**Watches a Recorded Webinar**

Prospect again seeks out passive content but invests substantial time in watching a recorded webinar. Contact prospect to discuss next steps.

**Registers for Virtual or F2F Event**

Sustain prospect's interest between registration and event with a phone call. Discuss prospect's questions how event attendance will be helpful.

Event Activity

**Attends a Virtual or F2F Event**

Follow-up with a phone call; build on excitement of interacting with faculty, alumni, students and ensure individual questions are resolved.

Hand Raise about Complicated Issue

?

**Submits Question or Uses Self-Evaluation Tool about Transfer Credit**

Contacts explain that questions about transferring previous college credit are best addressed over the phone. Even if a COE unit hosts an informal credit evaluation tool on its website, consider calling tool users and offer an in-depth evaluation based on past institutions attended.

***Prioritizing Outreach:*** *As prospects progress through the recruitment funnel, the total volume of prospects decreases; as such, to save time, recruitment advisors may decide to prioritize those action-based calls that occur later in the recruitment funnel. Similarly, the most interested prospects take the actions on the right side of the diagram above; when strapped for time, advisors should focus outreach on the right-most column.*

# Tool #2: Guidelines for When to Call a Prospect (cont.)

## Prospect Action-Based Guidelines: When to Call Prospects (cont.)

When basing phone call schedules on prospect action triggers, consider the extent to which prospect email and website activity can be tracked. Discuss the following with your website and technology support team:

- Does the e-mail vendor track when prospects click a link embedded in an e-mail?
- Does the e-mail vendor track when prospects forward e-mails?
- Does the website/portal vendor track visit activity based on prospects' IP addresses (or e-mail addresses if website is designed as portal)?
- Does website/portal vendor track visits to video or archived webinar pages?
- How is event/webinar registration versus attendance tracked?

# Tool #3: Communications Plan Builder

A strong communications plan is instrumental for nurturing prospects through the funnel without making unrealistic demand upon enrollment counselors' (or their equivalents') time. However, the myriad *x* factors involved like duration, frequency, content, and program type make the process of building communication plans daunting.

The Communications Plan Builder simplifies this process by bringing order to it. First it lays out the key considerations that should be taken into account while defining a communication plan. It then describes a model plan that applies thosee key considerations. Next it delivers several example communication plans graciously provided by research contacts. Finally it provides a worksheet to use with staff to encourage meaningful contribution.

## Determining Communications Plans' Defining Features

### Primary Consideration: Program Type

The table below explains how automated communication plans should differ according to program type, the most obvious "independent variable" according to which communications should be customized. Set up the scaffolding for your program-type specific communication cascades with the following dependent variables in mind.

| | **Recommended Features of Communication** | | |
|---|---|---|---|
| **Program Type** | **Max Frequency** | **Duration*** | **Content** |
| **Individual Enrichment Course** | Once per week | 2 months | • Convenience:<br>  ○ On-the-ground locations<br>• Curriculum<br>• Faculty background in niche (program) area |
| **Individual Professional Development Course** | Once per 2-3 days | 1-2 months | • Convenience:<br>  ○ Modalities<br>  ○ Start dates<br>  ○ Duration<br>• Application to certifications/industry standards<br>• Registration<br>• Faculty's field experience |
| **Certificate** | 1-2 times per week | 3 months | • Alumni outcomes<br>• Faculty's field experience<br>• Credit transfer to degree program<br>• Curriculum alignment with industry standards<br>• Convenience<br>  ○ Modalities<br>  ○ Start dates<br>  ○ Duration<br>• Financial aid |
| **Undergraduate Degree Completion** | 1-2 times per week | 4-6 months | • Convenience<br>  ○ Modalities<br>  ○ Start dates<br>  ○ Duration<br>• Financial aid<br>• Student profiles addressing key concerns:<br>  ○ Work-life-school balance<br>  ○ Academic rigor<br>• Curriculum<br>• Credit transfer<br>• Experiential credit |

# Tool #3: Communications Plan Builder (cont.)

| | | | |
|---|---|---|---|
| **Master's Degree** | 1-2 times per week | 6-8 months | • Convenience:<br>○ Modalities<br>○ Start dates<br>○ Duration<br>• Financial aid<br>• Student profiles addressing key concerns:<br>○ Work-life-school balance<br>○ Academic rigor<br>• Curriculum<br>• Faculty profiles<br>○ Practical experience in the field<br>○ Academic experience in the field<br>• Credit transfer<br>• Experiential credit |

*After the recommended durations elapse, the Forum recommends moving prospects to a cold prospect communication plan. See Tool #15: Cold Lead Email Preference Template, for assistance developing long decision cycle communications.

**Secondary Considerations: Select Segments**

Certain segments of prospective students may merit additional outreach customization due to content preferences that differ significantly from typical communication plan content. The COE Forum lists a few such segments and their preferences below. Marketing leaders should query their marketing and recruiting staff to ascertain whether any other segments merit special customization. The COE Forum advises that the most efficient way to customize outreach to these groups is in the first email and phone conversations.

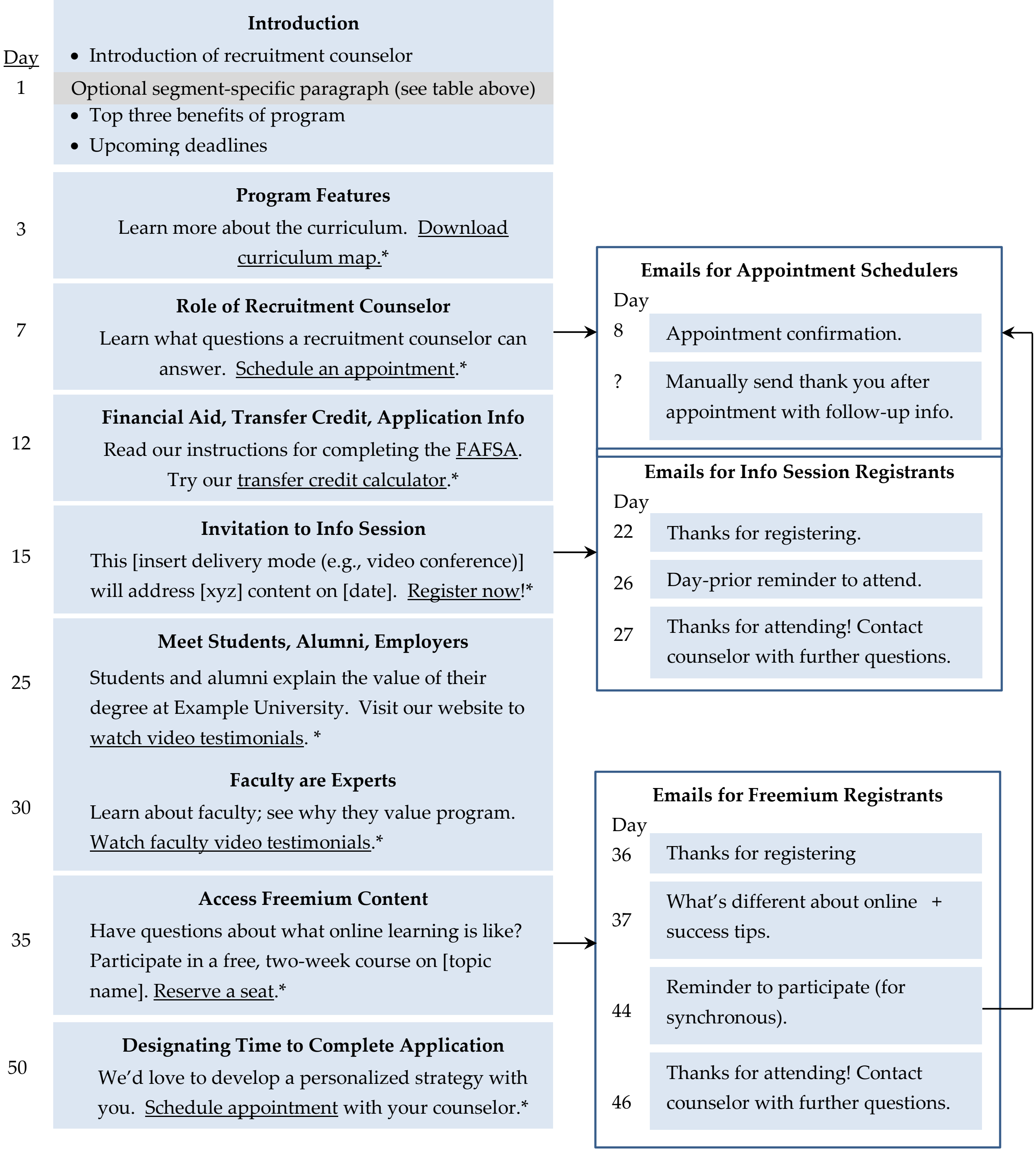
| Segment | Content for Initial Email and Downstream Phone Conversations |
|---|---|
| **International** | • Demand for content in home country<br>• Convenience<br>○ Visa<br>○ Travel arrangements<br>• Cost of traveling to and living in the U.S. (or cost saved by not incurring these expenses if online)<br>• Network of students like them/profiles of students like them<br>• Outcomes of international students |
| **Alumni** | • Special promotions for return students |
| **Military** | • Convenience<br>○ Working around deployment<br>○ Continuing coursework while deployed<br>• Special promotions for military personnel<br>• Experiential credit |
| **Community College** | • Same as degree completion prospects (above) |

**An Optional Consideration: Intended Start Date**

Many contacts rely on intended start date to both score leads and set the pace for future communications. If doing so is feasible (i.e., if a unit has the necessary staff and/or technological capacity), the Forum recommends using intended start date followed by accelerated versions of the program type-specific communication plan. If resources are too limited to segment according to start date and create accelerated communication plans, the Forum advises using program type as the primary consideration for determining the optimal communications cascade for a prospect.

## Model Communications Plan for Master’s Degree in Social Work Prospect

This plan suggests the order and variety of content that should be communicated to a prospective master’s degree student. Similar plans should be made for all program+ program type combinations with modifications to content and delivery schedule made according to the needs outlined on the previous page. See Tool #2, Guidelines for When to Call a Prospect, for information about overlaying phone contact.



| Day | |
|---|---|
| 1 | **Introduction**<br>• Introduction of recruitment counselor<br>Optional segment-specific paragraph (see table above)<br>• Top three benefits of program<br>• Upcoming deadlines |
| 3 | **Program Features**<br>Learn more about the curriculum. Download curriculum map.* |
| 7 | **Role of Recruitment Counselor**<br>Learn what questions a recruitment counselor can answer. Schedule an appointment.* |
| 12 | **Financial Aid, Transfer Credit, Application Info**<br>Read our instructions for completing the FAFSA. Try our transfer credit calculator.* |
| 15 | **Invitation to Info Session**<br>This [insert delivery mode (e.g., video conference)] will address [xyz] content on [date]. Register now!* |
| 25 | **Meet Students, Alumni, Employers**<br>Students and alumni explain the value of their degree at Example University. Visit our website to watch video testimonials. * |
| 30 | **Faculty are Experts**<br>Learn about faculty; see why they value program. Watch faculty video testimonials.* |
| 35 | **Access Freemium Content**<br>Have questions about what online learning is like? Participate in a free, two-week course on [topic name]. Reserve a seat.* |
| 50 | **Designating Time to Complete Application**<br>We’d love to develop a personalized strategy with you. Schedule appointment with your counselor.* |

**Emails for Appointment Schedulers**

| Day | |
|---|---|
| 8 | Appointment confirmation. |
| ? | Manually send thank you after appointment with follow-up info. |

**Emails for Info Session Registrants**

| Day | |
|---|---|
| 22 | Thanks for registering. |
| 26 | Day-prior reminder to attend. |
| 27 | Thanks for attending! Contact counselor with further questions. |

**Emails for Freemium Registrants**

| Day | |
|---|---|
| 36 | Thanks for registering |
| 37 | What’s different about online + success tips. |
| 44 | Reminder to participate (for synchronous). |
| 46 | Thanks for attending! Contact counselor with further questions. |

*Opportunities to collect additional prospect information via such tools as Quick Polls. See Tool #14: Quick Poll Questions.

## Implementation Tips for Creating a Communication Plan

- ✓ **Always Look for Low/No-Pain Ways to Collect More Information**: Each prompt to follow a link (e.g., to register for an event, schedule a conversation, use the credit transfer or cost estimate calculators, etc.) is an opportunity to collect additional information about the prospect through a quick survey. Single questions can be incorporated into pop-up forms, or can be incorporated into simple registration/scheduling forms. See Tool #14, Quick Poll Question Guide, for more guidance on using quick surveys.
- ✓ **Save Time by Recycling Material**: To the extent possible, the COE Forum aimed to create a communication plan that confines program-specific unique content to just a few steps in the communication plan (i.e., Program Features, Faculty are Experts). The emails at each of the remaining steps can reuse content from other communication plans and be reused themselves. As a result, new communication plans for other master's degree programs should be lighter builds.
- ✓ **Consistently Incorporate Calls to Action**: Contacts advise that each message should contain one or two calls to actions. Popular ones include: Register Now, Talk to Your Recruitment Counselor Now, and Register to Attend an Admissions Event

## Overview: Communications Plans Samples

The sample communications plans that follow are adapted from a diverse group of COE units with different strategies for engaging prospects. While all of them involve some combination of email, phone, and some hard-copy mailing contact points, they are differentiated by the triggers and intervals for each type of outreach.

- **Plan 1: Front-Loaded Communications With Tapered Outreach**
  - If prospects get stuck in the funnel early on, this plan focuses on engagement of the prospect at the time of their inquiry, limiting resource investment in the prospect after the initial interest has waned.
- **Plan 2: Outreach To Segments Based on Demographics and Inquiry Actions**
  - For marketing directors wondering how to determine contact triggers for outreach, this plan lets the prospect speak for themselves—data on *who* the prospect is, and *what* the prospect does to indicate interest in the programs determine how and when outreach is conducted.
- **Plan 3: Maximized Automation Through Degree Program Segmentation**
  - If the inquiry form includes information on program interest, this plan allows for a heavy emphasis on program specific information allowing limited staff time to be spent on outreach that is specific to the individual prospect, not the program.
- **Plan 4: Customized Base Template for Many Segmented Audiences**
  - If the baseline template is working but the unit just needs some more segmentation, this plan offers some insight into how to maximize "tweaks" to provide prospects with a customized outreach experience without taxing staff too heavily with unique communications.
- **Plan 5: Highly Automated Custom Outreach For Non-Credit Prospects**
  - For programs concerned about filling up non-credit program seats, this plan places a heavy emphasis on information session registration and payment plan inquiries to identify prospects that are worth staff time.

# Tool #3: Communications Plan Builder (cont.)

## Plan 1: Front-Loaded Communications with Tapered Outreach

Source: University of Chicago Graham School of Continuing, Liberal, and Professional Studies

**Day of Inquiry**

1. Inquirer completes landing page, including name, email, phone, and program area
2. System records the URL so inquiry can be tagged by general and program area.
3. Web system generates automated “Thank you for your inquiry” email; information saved in IT file.

**8-9 am next business day:**

Enrollment Manager:

1. Download inquiries from last 24 hours from web inquiry;
2. Upload inquiries into PW database “Web Inquiry.” (Database not available to staff during this time.)

Database will record the following:

- Name
- Email
- Phone (if provided)
- General program area
- Specific program area(s)

**10 am – 5 pm next business day**

Enrollment Manager:

1. Download lists of inquirers by program area from PW “Web Inquiry”
2. Send program specific email to inquirers, including:
    - Thank you for inquiry
    - Introduce self as program manager with contact information
    - Critical information about program, upcoming deadlines
    - Invitation to program or general “information session,” with link (if scheduled)
3. Record email contact in database “Web Inquiry” notes field
4. Capture emails of inquirers
5. Add to email lists, coded by program areas
6. Send emails used in general announcements, email blasts, and invitations
7. Alert staff of new inquiries in the database

**Within one week**

Program Staff:

1. Make phone contact (if number available) with inquirer; record contact in “Web Inquiry” database
2. Use database to invite inquirers to relevant events, including lectures, information sessions, alumni events, webinars

**Ongoing**

Enrollment Manager

1. Troubleshoot issues in master database
2. Schedule space/manage technology for program recruitment events; develop and manage master schedule of events for school
3. Research, benchmark peer institutions’ process, systems for enrollment
4. Participate in discussions of enrollment goals, strategies and development of tactics for increasing enrollment
5. Participate in evaluation and measurement of marketing/enrollment efforts

Inquiry Management: Change of Inquirer Status

1. Inquirer should be added to the permanent database when:
    - Inquirer attends lecture, information session, or free event
    - Inquirer enrolls in a single course
    - Inquirer applies for certificate program or degree

# Tool #3: Communications Plan Builder (cont.)

## Plan 2: Outreach to Segments Based on Demographics and Inquiry Actions

Source: Southern New Hampshire University

**Within 24 hours of inquiry**

1. Email viewbook, First application, financial aid brochure

**Within 7 Days**

1. Segment by:
    - Major/Department
    - Undecided
        - Send: General Academic Brochure
        - Academic Reply Card
    - Many Interests

**Within 14 Days**

1. Conduct Qualifying Call

**Within 30-45 Days from inquiry**

1. Check if they completed a campus visit
2. If Yes:
    - Send Faculty Brochure
3. If No:
    - Send Campus Visit Brochure and Appointment Card
    - Wait 14 Days
    - Conduct Pre Visit Call If Still No Visit Scheduled
    - Try to schedule visit over next 14 days
    - After 60 Days since inquiry, Send Faculty Brochure whether or not campus visit has been scheduled

**Within 2 months (90 days from inquiry)**

1. Send "Success After" Brochure and Second Copy of Application

**Within 3 months (90 days from inquiry)**

1. Send "Financing Your _______ Education" Booklet

**Within 4 months (145 days from inquiry)**

1. Conduct phone call

**Within 5 months (160 days from inquiry)**

1. Send "Last Chance" Reply Card and Third Copy of Application

**Within 6 months (175+ days from inquiry)**

1. If no action/contact
        - Send "Lost Inquiry Survey" at point of cancel

# Tool #3: Communications Plan Builder (cont.)

## Plan 3: Maximized Automation Through Degree Program Segmentation

Source: Oregon State University

**Immediately After Inquiry**

1. Inquirer completes request for information at: http://ecampus.oregonstate.edu/contact
2. The CRM System immediately does the following:
    - Sends a Form Submission Message (Pop-up) on Inquirer's screen saying "Notice: Your inquiry has been submitted successfully" with a button that says "Ok"
        - ○ When the inquirer clicks "Ok" it sends him/her to a new Return URL (http://ecampus.oregonstate.edu/contact/thank-you.htm)
    - Creates a closed Case in the CRM
    - Creates a Contact in the CRM (which is sent to the Enrollment Services Team); contact has this info:
        - ○ Lifecycle Record Assignment
            1. Lifecycle Role: Automatically set to Prospect
            2. Lifecycle Stage: Automatically set to Active
        - ○ Assigned Degree Type Based on Inquiry Form
            1. Degree Type 1 (Bachelor's): Enter Target as Bachelor's Prospect
            2. Degree Type 2 (Graduate): Enter Target as Graduate Prospect
            3. Degree Type 3 (Courses Only): Enter Target as Courses Only Prospect

| **Lifecycle Record** | **Communications Plans** | | |
|---|---|---|---|
| | **Degree Type 1 (Undrgrd)** | **Degree Type 2 (Grad.)** | **Degree Type 3 (Courses)** |
| ○ *In OSU's CRM, they've created rules in the CRM to withdraw the prospect from the communications plans on the basis of their degree types and lifecycle assignments.*<br>○ *If a student changes to inactive, for example, he/she will be removed; if they change from Degree 1 to Degree 2, the communications plan will also change* | Day 0:<br>○ Initial mailings<br>Day 1:<br>○ Email 1: Initial email (All)<br>Day 2:<br>○ Initial phone call<br>Day 8:<br>○ Email 2: University prestige (All)<br>Day 13<br>○ Email 3: Tuition, etc. (undergrad and grad)<br>Day 17<br>○ Email 4: Course demo, etc. (All)<br>Day 19<br>○ Follow-up phone call 1<br>Day 24<br>○ Email 5: Admissions overview (All)<br>Day 33<br>○ Email 6: Jobs and career counseling (undergrad and grad)<br>Day 40<br>○ Follow up phone call 2 | Day 0:<br>○ Initial mailings<br>Day 1:<br>○ Email 1: Initial email (All)<br>Day 8:<br>○ Email 2: University prestige (All)<br>Day 13<br>○ Email 3: Tuition, etc. (undergrad and grad)<br>Day 17<br>○ Email 4: Course demo, etc. (All)<br>Day 24<br>○ Email 5: Admissions overview (All)<br>Day 33<br>○ Email 6: Jobs and career counseling (undergrad and grad) | Day 0:<br>○ Initial mailings<br>Day 1:<br>○ Email 1: Initial email (All)<br>Day 3:<br>○ Email 5: Admissions overview (All)<br>Day 10<br>○ Email 2: University prestige (All)<br>Day 15<br>○ Email 4: Course demo, etc. (All) |

# Tool #3: Communications Plan Builder (cont.)

## Plan 4: Customized Base Template for Many Segmented Audiences

Source: Private, Primarily Adult-Serving University

<table>
<tr><th colspan="3">Inquiry from Prospect : Immediate response depends on type:</th></tr>
<tr><th>Call</th><th>Chat</th><th>Inquiry Form</th></tr>
<tr><td>1. Call Center answers</td><td>1. Admissions Counselor</td><td>1. Reply message generated and sent automatically<br>2. Contact is put in queue for contact <b><u>within 30 minutes</u></b></td></tr>
<tr><th colspan="3">Immediate Triage</th></tr>
<tr><td colspan="3">1. Assign “role” (is the prospect “shopping” or “intending to apply”?<br>a. <b>Shoppers</b>—noted by conversation that is typified by “browsing” questions, no mention of application<br>b. <b>Applicants</b>—noted by a clear indication from student that they intend to apply</td></tr>
<tr><th colspan="3">Communications Plans</th></tr>
<tr><td colspan="3">Unique Communications Plans with about 6 communications over 90 days, all customized based on:<br>• Roles (i.e., Shopper or Applicant)<br>• Stages (defined by prospect behavior/time from inquiry)<br>• Program Type (In which the lead is interested)<br>• Level of Degree Completed (Prior to starting at University X)</td></tr>
<tr><th colspan="2">Shopper Role</th><th>Applicant Role</th></tr>
<tr><td colspan="2">Stage 1: New Lead<br>• <u>Description:</u> Has not received outbound call from admissions counselor yet<br>• <u>Action:</u> Put contact in queue for phone call</td><td>Stage 1: Applicant Open<br>• <u>Description:</u> Applicant is completing application and will be sending in licenses and transcripts<br>• <u>Actions:</u><br>○ System assigns each applicant a counselor based on alphabetical order<br>○ System generates automatic introductory email from counselor to make sure applicant is aware that personal time is available with a staff member when needed</td></tr>
<tr><td colspan="2">Stage 2: Interviewed<br>• <u>Description:</u> Admissions counselor spoke with him/her; they are shopping around<br>• <u>Action:</u> Commence 90 day/6 touch point communication plan<br>○ 7 Days: Email 1<br>○ 15 Days: Email 2<br>○ 30 Days: Email 3<br>○ 45 Days: Email 4<br>○ 60 Days: Email 5<br>○ 90 Days: Email 6</td><td>Stage 2: Intermediate Steps<br>• <u>Description</u>: Communications while student is completing application<br>• <u>Actions</u><br>○ Commence 90 Day/6 touch point communication plan<br>▪ 7 Days: Email 1<br>▪ 15 Days: Email 2<br>▪ 30 Days: Email 3 (conversion likely if they’ve applied)<br>▪ 45 Days: Email 4 (conversion likely if they’ve applied)<br>▪ 60 Days: Email 5<br>▪ 90 Days: Email 6<br>▪ >6 months: 3 Dormant Emails<br>○ Automatic emails generated based on application material submission (e.g., “Thank you for submitting your transcript.”<br>○ Counselor sends prospect an unofficial evaluation of credits from counselor to applicant to offer a rough idea of how many credits they can bring from past education</td></tr>
<tr><td colspan="2">Stage 3: Apply<br>• <u>Description</u>: The prospect indicated that they will be applying or already began the application<br>• <u>Action</u>: System sends automatic email within 48 hours if prospect has not</td><td>Stage 3: Applicant Closed<br>• <u>Description</u>: Applicant is fully admitted<br>• <u>Action</u>:<br>○ Commence automatic communication (5 messages over 30 days) includes messing about how to enroll and how to take a “test drive course”</td></tr>
</table>

| | |
|---|---|
| commenced application; email asks if they have any more questions before they apply. | ▪ 3 Days: Email 1<br>▪ 5 Days: Email 2<br>▪ 14 Days: Email 3<br>▪ 20 Days: Email 4<br>▪ 30 Days: Email 5<br>○ Phone call triggered in system if applicant has not enrolled within two weeks after reaching the "Close" stage |
| Stage 4: Attempted Call<br>• Description: Admissions counselor tried to contact student over phone<br>• Action: Put in queue for further follow up outreach | Stage 4: Dormant<br>• Description: Applicant admitted but not enrolled in 60 days<br>• Action: Commence 3 message plan starting from date of admission, messages focused on "re-engaging"<br>○ 60 Days: Email 1<br>○ 90 Days: Email 2<br>○ 120 Days: Email 3 |
| Stage 5: Non-viable<br>• Description: The prospect is not going to convert<br>• Action: Either remove from database or maintain if viability is time dependent and dormant communications would be helpful | |
| Stage 6: Do not call<br>• Description: The prospect indicates they do not want phone contact<br>• Action: Maintain email communications plan | |
| Stage 7: Dormant<br>• Description: No action from prospect after 6 months<br>• Action: Commence 3 message communications plan focused on reengagement | |
| Stage 8: File Closed<br>• Description: Admissions counselors tried 5 times to contact student and were unsuccessful<br>• Action: Remove from email campaigns/queues for contact | |

# Tool #3: Communications Plan Builder Tool

## Plan 5: Highly Automated Custom Outreach for Non-Credit Prospects

Source: University of Delaware Professional and Continuing Studies

<table>
<tr><td colspan="2"><b>Within 24 hours of inquiry</b></td></tr>
<tr><td colspan="2">1. Send first email with:<br>- Links to the website<br>- Dates/Times of the program<br>- Invitation to register for free Information Session (held twice a year in January and July)</td></tr>
<tr><td colspan="2"><b>General Email Schedule</b><br><b><i>Prior to Information Session, all prospects receive same email campaign (minimum of three emails before next session) encouraging them to register and attend the Information Session</i></b></td></tr>
<tr><td colspan="2">1. Email 1<br>2. Email 2<br>3. Email 3</td></tr>
<tr><td><b>Do Not Register for Information Session<br>(Dormant Prospects)</b></td><td><b>Do Register for Information Session<br>(Hot Prospects)</b></td></tr>
<tr><td rowspan="7">1. Added to mass email list for outreach prior to course start date</td><td>1. Email 1: 10 days before Information Session<br>2. Email 2: 2 days before Information Session</td></tr>
<tr><td><b>After Information Session:<br>Each registrant is assigned a new email campaign with content based on program type and timing based on program start date.</b></td></tr>
<tr><td>1. Email 1:<br>a. If attended: “Thanks for attending”<br>b. If didn’t attend: “Sorry we missed you”<br>2. Email 2:<br>a. Program dates and registration info<br>3. Email 3:<br>a. Financial aid information, program dates, registration information</td></tr>
<tr><td><b>One Week After Information Session</b></td></tr>
<tr><td>1. Program coordinators make phone calls to assess prospect interest for programs with available seats<br>a.</td></tr>
<tr><td>If they request payment plans</td></tr>
<tr><td>a. They are referred to the Financial Aid advisor who follows up with a phone call/email<br>b. Program coordinators request that prospect completes a payment plan form and a registration form</td></tr>
</table>

# Tool #3: Communications Plan Builder Tool

## Worksheet: Foundations of a Communication Plan

This worksheet should be used to facilitate small-group discussions about prospects' differentiating needs as they move through the funnel and how currently-available collateral can be co-opted to meet those needs. First assign groups and then either assign each group a program from your portfolio or allow them to select their own based on the programs they work with most closely.

### Instructions

- **Identify program attributes that communication campaigns should feature**

Identify your assigned or preferred program type (based on the programs you work with most closely) and write it here: ____________________________________

Complete the table below according to these instructions

1. Note the stages of the funnel listed in the leftmost column. Consider: Which program attributes should be highlighted in e-mails and phone conversations given the program type? Review checklist in Tool #1, Buying-Cycle-Based Lead Nurturing Map, and the "bank" below.
2. Fill in the program attributes that should be communicated at each stage in the recruitment funnel based on what a prospect at that stage is likely to want to know. Use the Attribute Bank if you need help getting started.
3. Ask yourself, "What existing collateral already features the attributes identified above?" Are these documents ready for conversion to an e-mail message catered to prospects? Record these pieces of existing collateral in the rightmost column.

**Attribute Bank**

- Convenience
- Curriculum
- Cert. preparation
- Deadlines
- Financial Aid
- Alumni outcomes
- Credit transfer
- Industry alignment
- Faculty expertise
- Student profiles
- Experiential learning
- Faculty profiles

- **Communication Plan Foundations**

*Which Program Attributes to Feature in a Communication Plan and When? Does Collateral Exist?*

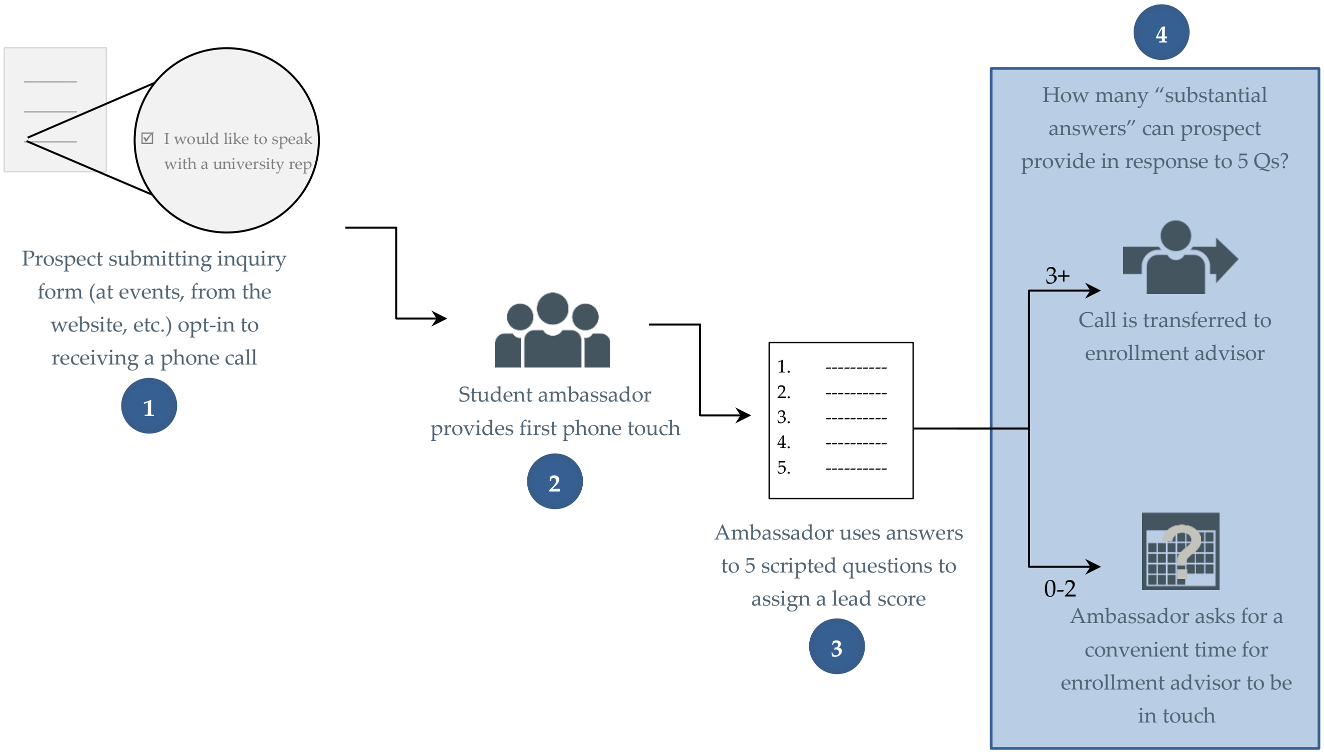
| | Program Attributes | Existing Collateral |
|---|---|---|
| **Prospect Stage in Recruitment Funnel** | *Record program attributes important to communicate to prospective students here.* | *Record existing marketing, website, or alumni affairs content that could be translated into a prospect e-mail.* |
| Prospect interested, researching, or considering | | |
| Prospect stalled and feeling anxious | | |
| Prospect began application but stalled (feeling anxious) | | |
| Prospect completed application and/or is admitted but is feeling anxious | | |

# Tool #4: Lead-Prioritizing Phone Script

Research has shown that phone conversations used at the right stage in the buying process can be highly compelling to a prospective student and useful for gauging their interest and likeliness to convert. However, many continuing and online education units struggle to provide such high-touch interaction with all of their prospects with a lean staff. Metropolitan State University worked around their staff size by using student ambassadors as ancillary phone staff. By completing the initial phone screen, student ambassadors prioritize phone follow-up delivered by enrollment advisors.

The Lead-Prioritizing Phone Script profiles Metropolitan State's ambassador-driven phone screen process, including the script ambassadors use to score leads before making recommendations to enrollment advisors.

## The Lead Scoring Process



1. The process begins when a **prospective student submits an inquiry form** via the web or at in-person events. Inquiry forms contain an opt-in check box for those prospects that want to speak with a university representative. Actively electing to receive a call screens for those prospective students who submitted an inquiry form just to receive swag at an event.
2. To save enrollment advisors' time, **student ambassadors provide the first phone touch**.
3. Over the course of the conversation, **ambassador asks the prospect 5 questions** (see below). The script ensures the quality of the conversation as well as the uniformity of lead scores.
4. The number of "substantial answers" (defined as a response of more than 5 words) a prospect can provide **earns him a score from 0-5**.
    a. Ambassadors **immediately transfer hot leads, those with 3+ significant responses, to an enrollment advisor** for more in-depth conversation.
    b. Ambassadors **ask warm leads, those with a score of 0-2, for a preferred date and time window** during which an enrollment advisor should be in touch. This gives cooler leads more space, while also providing enrollment advisors with greater scheduling flexibility.

# Tool #4: Lead-Prioritizing Phone Script (cont.)

## Lead Scoring 5-Question Script

The script below is used by student ambassadors when reaching out to prospects for the first time in an attempt to discern how serious they are about enrolling.

**Lead-Scoring Script**

1) What's going on now that is driving your decision to go (back) to college? How will that help you? Why are you looking for a change?
2) What type of program and college will help you achieve your goals?
3) What do you hope to accomplish by earning your degree?
4) Are there specific characteristics you are looking for in a program or university?
5) Who is supporting your decision to go back to school? How do they feel about it?

## Building Your Own Script

If your script is only intended to determine how seriously a prospective student has thought through his or her decision to go back to school (as diagnosed by the number of detailed responses they can provide to questions), then developing that script can be as straightforward as asking meaningful questions in a thoughtful tone. Ideas for types of questions to ask are listed below:

1. Motivations for returning to school
2. Sources of worry
3. Programs/areas of interest
4. Need-to-have components of a program/institution/experience
5. Previous educational experience

Ideally, however, the intelligence derived from the call will be put to use not only to score the lead, but to identify meaningful ways to continue the conversation in the future. For example, a prospect who voices worries about funding her education would highly value an email about FAFSA, financial aid, and work opportunities (if it is an on-campus program).

# Tool #5: Personalized Email Builder and Templates

Template e-mails save staff members time as they manage a large volume of outreach. However, many template emails are impersonal or bland. This tool outlines a framework for templates that feel personalized through an engaging voice that fits the purpose of the email and the institutional identity. Additionally, the tool includes several examples based on lessons learned by COE Forum members. Still, above all, the COE Forum recommends A/B testing various components of the emails to find which content and voice resonates best—as we know, target audience vary by institution and by program time.

Complete the worksheet below to help your team think through how to craft each e-mail component for the best possible open and action rates. Then review the e-mail samples beginning on the following page.

## Email Builder Worksheet

**From Field**: Alan@exampleU.edu

- ➢ **Send e-mails from a recruitment advisor's email address.**

**Subject Line**

Consider the following subject line strengtheners:

- Prospect's Name Example: Benjamin, thanks for your interest. I have a few answers to your questions.
- Question Example: What motivates you to return to school?
- Casual Greeting Example: Hello from ExU! We have stress management tips to share!
- A Call-to-Action Example: Experience online learning: register for the next test-drive course before Friday.

List two elements from the list above that you would incorporate into a subject line.

______________________________ ______________________________

Compare answers with a colleague and craft a sample subject line. Write your sample below:

_________________________________________________________________________

**Salutation:**

- ➢ **The COE Forum recommends either addressing an e-mail to the prospect's first name or eliminating the salutation and beginning the e-mail with a casual greeting.**

Consider the following salutations. Check the salutation that you think will best resonate with your prospective student audience based on the age and career level of your typical prospective student:

- ☐ Dear Brian,
- ☐ Hi, Brian:

Generally more appropriate for older, more executive audience, but AB test to be sure.

- ☐ Hello and thanks for your interest in Example University!
- ☐ Hi there! We're glad you are interested in the MSW program at Example University.

**E-mail Body**

See the examples below for sample text.

**Sign Off and Signature**

- ➢ **Sign e-mails with a first name and including contact information in a signature**:

Have a nice day!
Alan
Alan@ExampleU.edu
xxx-xxx-xxxx

**Alternative sign offs:**

- All the best,
- Take care,
- Thanks again!
- Warm regards,

Calls to action serve students ready to take next step.

## 1. Sample Email: Thank You for Your Interest

*Subject: Padma, thanks for your interest. Your advisor has answers.*

Dear Padma,

I'm glad to hear you're interested in Example University's master's degree in liberal arts. While you continue to explore the resources available via the program portal, I hope you'll consider speaking to me over the phone to discuss any outstanding questions and your career and education goals. I can also share some tips for balancing coursework with family and work responsibilities.

To schedule a quick conversation, please follow the link below and select a date and time that is convenient for you to speak over the phone. I'll give you a call at the selected time, and the conversation can be as quick or as in-depth as you like.

http://www.speaktoGryffindor.Example.edu

In the meantime, take a moment to watch this 3-minute clip of Dr. McGonagal, professor of organizational behavior and winner of the President's Teaching Award, describe how her curriculum prepares students for a global business environment: http://www.McGonagalCurriculum.Example.edu. You'll also get a sneak peek into Dr. McGonagal's plans for a business immersion trip to India, a two-week experience open exclusively to online students.

I look forward to speaking with you soon.

Thanks for your time,
Margaret

**Margaret Grainger**
Recruitment Advisor
Gryffindor School of Professional Studies
Example University

mgrainger@example.edu
xxx-xxx-xxxx

## 2. Sample Email: Register for a Test-Drive Course

*Subject: Experience online learning at Example University: register for the next test-drive course before Friday, March 30*

Hi Padma,

Thanks for your continued interest in Example University. We recruitment advisors know that selecting an online master's degree program is a difficult and important decision; certainly, one factor you are weighing is quality of the course experience. To help you get a clearer sense of course quality, Example University offers test-drive courses, a chance **to experience the web-based interface through which students submit assignments, communicate with professors, and engage with fellow students.**

**Nearly 70 percent of new students report registering for a test-drive course before applying to for the master's degree of liberal arts, and our next test-drive begins in one week. Register for the test-drive course today, and I'll remind you to log into the test-drive course next week.**

**Test-Drive Example University**
**Introduction to Conflict Management**
Saturday, March 31-Saturday, April 6
Lesson: Establishing Stakeholder Interests
Professor Knox

**Register by 11:00pm on Friday, March 30** to receive your username and password.

Please let me know if you have any questions about the test-drive course or any part of the application process. I am happy to discuss career goals, course selection questions, and advice for financing your degree.

All the best,
Margaret

**Margaret Grainger**
Recruitment Advisor
Gryffindor School of Professional Studies
Example University

mgrainger@example.edu
xxx-xxx-xxxx

P.S. Do you know a friend or colleague who might be interested in enrolling in an Example University Program? If so, please forward on this invitation by completing this form.

## 3. Sample Email: Read/Hear Engaging Content Relevant to Adult Learners

Hi there, Padma. Margaret here with Example University. I hope you will join us for a special presentation on stress management, a topic that surfaces in most of my conversations with adults who decide to return to school for a professional degree. With the demands of multiple responsibilities, including school, poorly managed stress can distract us from our health and path to success. Example University is here to help our students manage existing stress and prevent unchecked stress in the future. For a start, we encourage all future students to register for the presentation below:

**Overcoming Stress with Dr. Barnard**
**Special Presentation, Including 10-Minute Quiz and Personalized Suggestions**
April 10, 2013
9:00pm ET
*Available as a recording until May 1, 2013*

Learn successful management tactics from current students and hear from Professor of Psychology, Dr. Barnard, on the following stress topics:

- Symptoms
- Causes
- Management
- Action and Prevention

After the web-based presentation and questions from viewers, complete a 10-minute quiz and receive a personalized action plan. Select either the April 10 live option or the recorded option when registering.
>>Register for free here

I hope this helps on your road to selecting a professional program. Please reach out if I can address any concerns!

Take care,
Margaret

**Margaret Grainger**
Recruitment Advisor
Gryffindor School of Professional Studies
Example University

mgrainger@example.edu
xxx-xxx-xxxx

## 4. Typical Areas for Improvement in Introductory Emails

These sample emails exhibit a few worrisome traits that render them both impersonal and unhelpful: 1) vague claims about integrity of institution, 2) redundancy of information, and 3) stilted language with unclear syntax. Avoid these and other errors highlighted below when composing automatic emails.

Dear Katherine Zellner,

Generic language without memorable details

Thank you for requesting information regarding online education at the Example University. The Extended Education Unit is committed to providing you with an exceptional educational experience. Please see information below to help you get started in finding a quality online degree or certificate program.

Redundant information too close together

If you have any questions, you may follow up with the Extended Education staff:

- xxx-xxx-xxxx
- info@example.edu

**Information at your finger tips:**

- **Contact us** for more help by calling xxx-xxx-xxxx or emailing info@example.edu
- **Extended Education Overview** - Provides a brief overview about Extend Education and its delivery media, programs of study, student services, credit options, faculty, admission, tuition and fees, and financial aid.
- **Degrees and Certificates Overview**- Provides printable descriptions and contact information for the online degree and certificate programs offered by Example University.

Content not specific to prospect interests

You will need Acrobat Reader to view these documents. Download here: http://www.adobe.com/products/acrobat/readstep2.html

---

Dear Katie,

Confusing program name

Thank you for your interest in EXU master's concentration degree in public relations online program. EXU can provide the tools to advance your skills while opening more doors for you when choosing this prestigious program. Pursuing this master's degree can provide:

Unclear wording around curriculum outcomes

- Managerial skills in communication to benefit various PR firms
- Advanced knowledge in social media, management, crisis communications, and strategic campaigns
- Potential career satisfaction, increased income, and promotion opportunities
- Deeper knowledge of social media, public relations, marketing, and advertising within various organizations

A second focus of the email dilutes efficacy

Take an opportunity to get to know our students and graduates by listening to our pre-recorded webinars. You can have the opportunity to listen to their experiences, success stories, and how they balance their obligations. You can view the webinars by clicking this link: http://webinarstories.example.edu

Overly formal language

I am pleased to guide you through the application process to discover how the online PR program can make a positive difference in your future. Please call in to apply, I look forward to speaking with you.

# Tool #6: Faculty Assistance Recruitment Campaign Models

Interaction with instructors and current students helps prospective students fully understand the merits of a continuing, online, or professional education program. However, arranging one-on-one conversations between instructors and prospective students is rarely possible for all applicants, much less all prospects. Furthermore, faculty members and instructors balance competing demands on their time, and the recruitment office should be especially mindful of these time constraints. Current students are similarly pressed for time, and any ask for their help should be meaningful and efficiently facilitated.

When a personalized phone call or email from an instructor or current student is not possible because of the constraints described above, consider this solution: update the recruitment website with videos and blog posts that feature the stories and personalities of these influencers. The COE Forum recommends hosting interview sessions dedicated to capturing instructor and student messages, saving the recruitment office time and giving participants a clear timeline. This tool offers two template letters: one solicits instructor input about which students should be featured on the recruitment website, and the second asks instructors themselves to participate in an interview designed to yield blog and video content. These template letters can be modified to ask instructors for other types of input, including participation in a chat room, occasional phone outreach to highly desirable candidates, or appearance at a virtual or face-to-face open house.

## 1. Sample Letter: Invite Instructors to Be Featured on Recruitment Website

Dear Colleague:

During the remainder of 2013, we aim to recruit 1,000 future Example University students into 12 graduate and professional programs offered through the School of Continuing Studies (SCS). To meet that goal, we ask for your help as representatives of SCS academic rigor and teaching excellence—characteristics we know will shape students' decisions. It's our job to grab prospective students' attention and tell stories that showcase these very characteristics.

Please sign up for a 30-minute "Instructor Close-Up," during which you will speak to a videographer or blog-writer on our staff and offer a message to future students. Follow the link below to register.

**Instructor Close-Up**
**March 11, March 19, or March 20***
www.admissions.example.edu/InstructorInterviews
*Remote interviews can be arranged; please indicate that you work remotely when registering.

Please be prepared to answer some of the following questions with a videographer or blog-writer:

- What do you like most about the subject matter you teach?
- How does your program's curriculum meet industry needs, highlighting the skills your courses afford students who are preparing for a promotion or a career change?
- What sets your program apart from programs at competitor institutions?
- What should students consider when selecting elective courses?
- What has most impressed you about continuing education students you've taught in the past?
- If applicable to delivery format, how does the online format enhance the learning experience?
- What about your delivery format is unique?
- What experiential or discussion-based components are included in your course?
- How do instructors communicate with students enrolled in your courses?
- What do you consider "active ingredients" necessary for success in your course?
- What else do you think is important to communicate to prospective students?

As you know, these events give us the opportunity to capture the stories and images that will form the basis of our communications with prospective students this year. This information may be used in publications or on our website.

Please take a moment to read Dr. Mosley's blog submission and Dr. Bennett's video interview to understand how instructor messages are featured on our recruitment website; alternatively, follow the link below for all instructor messages: www.example.edu/InstructorMessages

We really appreciate all that you do every day to help us recruit the best students, and we could not do this work without you. We look forward to hearing from you; don't hesitate to reach out with questions.

Best wishes,

Patricia

Patricia Hill
Assistant Director of Recruitment
School of Continuing Studies, Example University
Patricia.Hill@example.edu

**Adapted from the University of North Carolina at Chapel Hill's Undergraduate Admissions Office*

## 2. Sample Letter: Ask Instructors to Recommend Students for Website Feature

Dear Colleague:

Many thanks to those of you who came out to the "Instructors Close-Up" sessions held in mid-March. I was delighted to read compelling interviews and watch hours of footage that showcase the advantages of the School for Continuing Studies' programs and highlight your teaching quality. I'm writing today with a similar request—this time, my staff and I hope to capture student stories that will inspire adult learners to pursue their education and career goals with Example University.

Which of your students do you believe represent the outstanding student body and the career-advancing programs offered through SCS? Please let us know, and we will contact them to arrange an interview during a "Student Close-Up" session. (All students who participate in the "Student Close-Up" will be asked to complete a short online profile but in return they will receive a selection of high-quality digital portraits for their own use.)

**Nominate Students for a "Student Close-Up" Interview with Recruitment Staff**

- Submit names via this form, available at http://www.Example.edu/StudentInterviewSubmission
- In a few sentences, describe how candidates excel in academics and apply coursework to career goals
- Kindly make all submissions by Tuesday, April 30

We appreciate your input as we highlight our student talent! Video and blog entries featuring interviews with students and instructors have proven to be some of our most popular web content, and we look forward to sharing more Example University stories. Please find past entries featuring students on our website: www.example.edu/StudentMessages.

Thank you again for your time, and please be in touch with any questions.

Best wishes,

Patricia

Patricia Hill
Assistant Director of Recruitment
School of Continuing Studies, Example University
Patricia.Hill@example.edu

**Adapted from the University of North Carolina at Chapel Hill's Undergraduate Admissions Office*

## Sample Faculty Profiles

The institutions profiled below offer compelling examples of faculty profiles, both video and text-based. Follow the links below to gather ideas for your own video production:

- Video Profile of Business School Faculty: http://profiles.kenan-flagler.unc.edu/
- Video Profile of Urban Planning Instructor: http://www.phoenix.edu/faculty.html
- Video Reflections on Teaching Online: http://www.youtube.com/watch?v=RwWGVDdr5n0
- Text Profiles Organized by Department (COE Unit Instructors): http://www.scs.northwestern.edu/program-areas/graduate/award-winning-faculty.php

# Tool #7: Tell-a-Friend Email Campaigns Tool

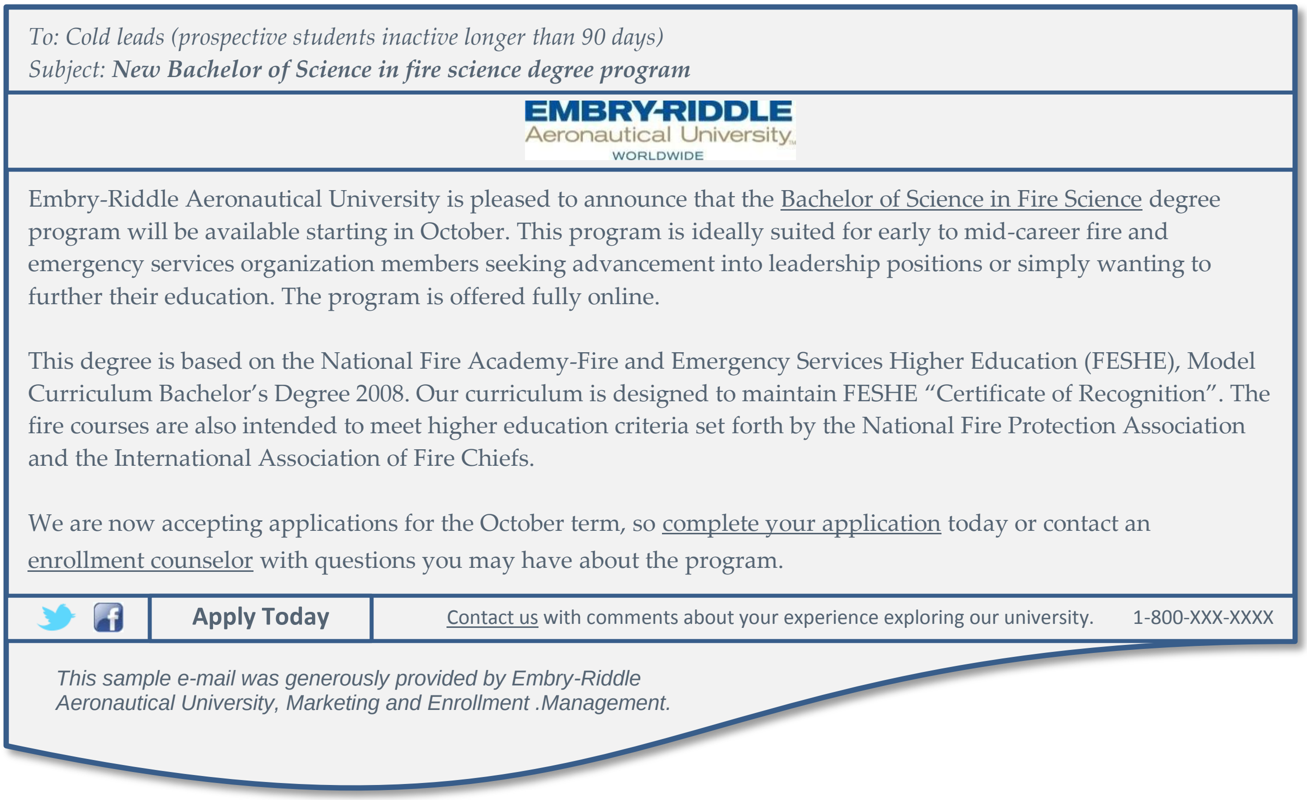
Over the course of hundreds of interviews with continuing, professional, and online education marketing and recruitment executives, the COE Forum found that most institutions housed contact information for thousands of prospects who would possibly never convert. With all of this rich information, COE leaders were left asking how to derive maximum value from these databases of cold, and even active prospects. The Forum found that innovative institutions were leveraging the fact that prospects—cold and warm alike—will forward interesting content to networks of "people like them," thereby introducing the recruitment office an introduction to other potential prospects. Messages contain mostly enriching and useful content about university or industry news with minimal direct sales pitches, making the messages more likely to be forwarded.

This tool offers five example e-mails, each of which presents a different type of enrichment content. The Forum believes recruitment officers can modify the messages below to highlight appropriate university news and industry-related content. The example e-mails illustrate how to communicate about the following:

- **Announcement of New Program**: Leverage cold leads whose peers have similar career interests
- **Personalized Infotainment**: Craft a message that is personalized (by name) and appealing to share
- **Industry Insights**: Invite cold leads to an industry-themed webinar; encourage them to share invitation
- **Conference Invitation:** Invite cold leads (and their network of peers) to visit your booth at conferences
- **Webinar Introduction to Learning Formats:** Ensure cold leads understand the variety of distance course delivery formats; they may forward a helpful explanation to others considering distance learning

## 1. Model Email Message: Announcing New Programs

The e-mail below illustrates how Embry-Riddle Aeronautical University continues to engage its cold leads through newsy e-mails that highlight new programs or other university accomplishments. Because e-mails offer content relevant to people working in a niche career field and focus only secondarily on a "call to apply," contacts find that cold prospects feel comfortable forwarding the message to peers. Approximately 30% of recipients forward these emails on to friends, colleagues, or family.



*To: Cold leads (prospective students inactive longer than 90 days)*
*Subject:* ***New Bachelor of Science in fire science degree program***

EMBRY-RIDDLE
Aeronautical University
WORLDWIDE

Embry-Riddle Aeronautical University is pleased to announce that the Bachelor of Science in Fire Science degree program will be available starting in October. This program is ideally suited for early to mid-career fire and emergency services organization members seeking advancement into leadership positions or simply wanting to further their education. The program is offered fully online.

This degree is based on the National Fire Academy-Fire and Emergency Services Higher Education (FESHE), Model Curriculum Bachelor's Degree 2008. Our curriculum is designed to maintain FESHE "Certificate of Recognition". The fire courses are also intended to meet higher education criteria set forth by the National Fire Protection Association and the International Association of Fire Chiefs.

We are now accepting applications for the October term, so complete your application today or contact an enrollment counselor with questions you may have about the program.

**Apply Today** | Contact us with comments about your experience exploring our university. | 1-800-XXX-XXXX

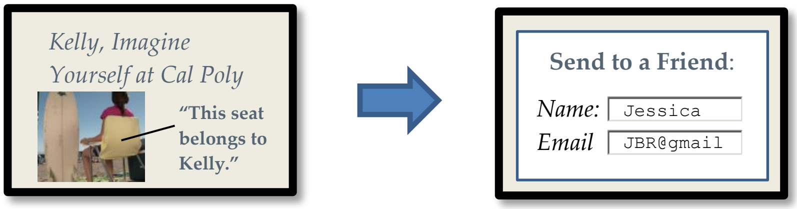
*This sample e-mail was generously provided by Embry-Riddle Aeronautical University, Marketing and Enrollment .Management.*

# Tool #7: Tell-a-Friend E-Mail Campaigns Tool (cont.)

## 2. Model Infotainment: Personalized Message and Video for Forwarding to Peers

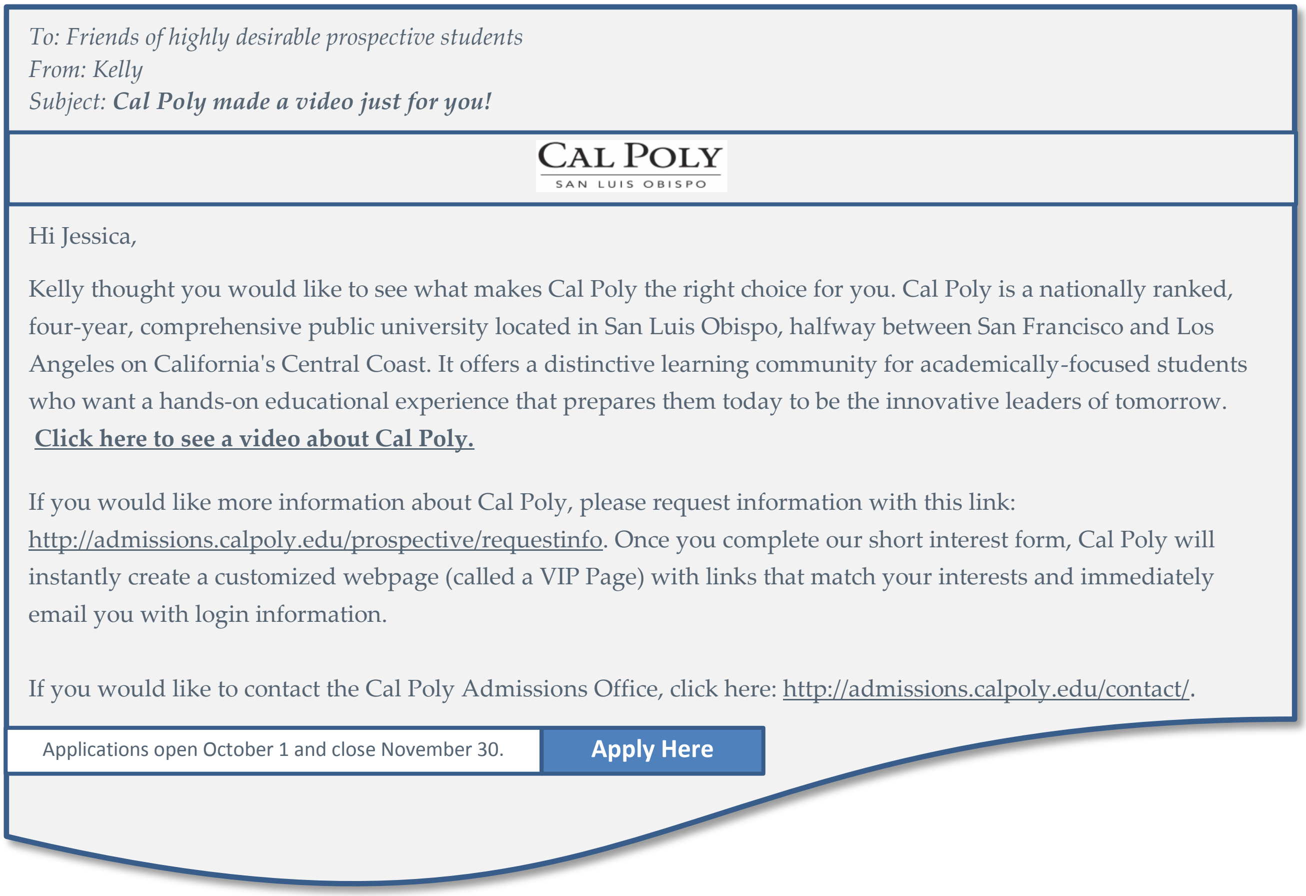
Toward the end of an application period, Cal Poly San Luis Obispo's undergraduate admissions office reminds its top-choice prospective students to apply with a short e-mail and a link to a personalized video. The video features images of students enjoying labs, lectures, and the coastal campus. At roughly even intervals throughout the video, the prospective student's name appears on an application form, on a football stadium scoreboard, and on a beach chair, all images that remind prospects to imagine themselves at Cal Poly.

At the end of the short video, prospective students are prompted to send the same video to a friend but the forwarded video will be personalized with the friend's name. Some prospects might send the forward because it's a clever piece of media and others might view the forward as a helpful reminder for friends. In either case, high-achieving prospective students encourage peers to consider Cal Poly in a fun and low pressure way.



Name: Jessica
Email JBR@gmail

In the model e-mail below, Cal Poly admissions staff approach Jessica as a friend of a prospect, using the same video but now personalized with Jessica's name, which is stored in the admissions database along with her e-mail address. Although this tactic is derived from an undergraduate admissions office, consider how to adapt content so that increasingly social-network-savvy adults can help your leverage the power of "share-with-a-friend" marketing.



*To: Friends of highly desirable prospective students*
*From: Kelly*
*Subject:* ***Cal Poly made a video just for you!***

CAL POLY
SAN LUIS OBISPO

Hi Jessica,

Kelly thought you would like to see what makes Cal Poly the right choice for you. Cal Poly is a nationally ranked, four-year, comprehensive public university located in San Luis Obispo, halfway between San Francisco and Los Angeles on California's Central Coast. It offers a distinctive learning community for academically-focused students who want a hands-on educational experience that prepares them today to be the innovative leaders of tomorrow. **Click here to see a video about Cal Poly.**

If you would like more information about Cal Poly, please request information with this link: http://admissions.calpoly.edu/prospective/requestinfo. Once you complete our short interest form, Cal Poly will instantly create a customized webpage (called a VIP Page) with links that match your interests and immediately email you with login information.

If you would like to contact the Cal Poly Admissions Office, click here: http://admissions.calpoly.edu/contact/.

Applications open October 1 and close November 30. **Apply Here**

# Tool #7: Tell-a-Friend E-Mail Campaigns Tool (cont.)

## 3. Representative Email: Industry Insights Webinar[1]

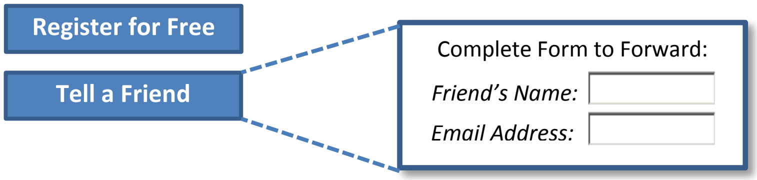
*To: Cold leads interested in a M.Ed. (prospective students inactive longer than 90 days)*
***Subject: How to incorporate computer science into secondary school curriculum***

We at Example University are looking forward to hosting a discussion about computer programming and coding instruction in secondary schools.  With a healthy and consistent demand for software engineers in the labor market, some educators think offering computer science training is an imperative but have little curriculum flexibility to do so. For example, only nine states consider computer science a math or science credit toward graduation.  Join a Google Hangout to discuss these topics with Example University's professor of education, Dr. J. Flowers, and Example University alumnus, Ryan Furtado, 12th grade teacher of mathematics at Rolling Hills High.

<u>The Future of Computer Science in Secondary Schools</u>
Google Hangout
Presented by School of Education Instructor, Dr. J Flowers, and Alumnus, Ryan Furtado
**May 13, 2013 • 2:00pm ET**

**Agenda**

- Take away ideas about how you can bring computer science training to your school by partnering with third-party organizations like Microsoft Technology Education and Literacy in Schools, which funds part-time computer science instruction, or CodeHS, which offers a self-directed online platform through which teachers of all disciplines can bring computer science training to their students
- Discuss how to present an argument for computer science education to your local school board
- Learn more about careers that demand computer and software programming expertise



Ready to pursue your degree but have questions?  <u>Let us know</u> and a recruitment counselor will get back to you.

**Implementation Tip**

If technologically feasible, design an interface that requires prospective students to enter friends' email addresses and names in order to forward the message (similar to interface through which nytimes.com readers can share e-mail articles with friends).  If technology is prohibitive, simply encourage e-mail recipients to forward messages to their friends and colleagues in a post script or some other visible location.

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[1] Adapted from Embry-Riddle Aeronautical University Worldwide, Marketing and Enrollment Management. Content source: http://www.codehs.com/about/ and http://www.usnews.com/education/blogs/high-school-notes/2012/10/01/high-schools-not-meeting-stem-demand

## 4. Representative Email: Industry Conference Invitation[2]

*To: Cold leads interested in Certificate in Health Coaching (prospective students inactive longer than 90 days)*
*Subject:* ***Save the Date: Join Example University at Health Coach Summit in October***

**Health Coach Summit–October 7-10, 2013**
You're invited to the Health Coach Summit, hosted at Example University and open to prospective students, current students, and alumni. The 2013 program will feature thought leaders and representatives of vendors and corporations innovating around health coach services. Speakers include:

- Margaret Rowan, CEO, Orange River Bank, Voted Healthiest Place to Work in 2012
- Suzanne Van Rooyen, Director, Health Coaches for Hire
- Phillip Oliver, editor at *Healthy Working Places*

**>>To register, please visit the Health Coach Summit website.**

**>>Tell a Friend**

Special rates for matriculated students apply for those who register before September 1st.

**Visit us at the Example University booth in the Florence Nightingale Hall**

- Speak to current students and alumni
- Pick up your application fee waiver card at the booth
- Test out a "stress source identification" simulation

Adapt message for any conference where your institution hosts a booth, regardless of location

Ready to pursue your degree but have questions? Let us know and a recruitment counselor will get back to you.

## 5. Representative Email: Webinar Introduction to Course Delivery Formats[3]

*To: Cold leads interested in Certificate in Health Coaching (prospective students inactive longer than 90 days)*
*Subject:* ***Example University offers 5 learning formats—choose the one best for you***

It's time--get comfortable with your e-learning options. Technology-enabled learning is ever evolving, and Example University is here to help you understand the type of course delivery formats available to School for Continuing Studies students. Whether you are deciding about returning to school at all or you are selecting the program best suited to your learning style, our upcoming webinar will offer a foundation for these important decisions; the results of a free self-assessment following the webinar will further inform your choice of formats.

**Overview of Course Delivery Formats and Choosing One for You**
Live Webinar, Format Preference Assessment to Follow
**May 20, 2013 ● 8:00pm ET**

Understand the nuances of these formats and learn about text, video, and computer-interactive instruction incorporated in each format:

- Synchronous video conferencing from home
- Synchronous video conferencing from satellite campuses
- Asynchronous online learning
- Blended classroom/online learning
- Self-paced, asynchronous online learning

**>>Register here for free** **>>Tell a Friend**

Ready to pursue your degree but have questions? Let us know and a recruitment counselor will get back to you.

---

[2] Adapted from Embry-Riddle Aeronautical University Worldwide, Marketing and Enrollment Management.

[3] Ibid.

# Tool #8: Corporate Alumni Club Builder

In aiming to leverage word-of-mouth advertising, COE units are on the hunt for pockets of alumni (main campus or COE) who are also likely to need to enroll in another course, certificate, or degree in the future. Based on COE Forum interviews, corporate alumni clubs offer universities a way to remind alumni of continuing education offerings, to establish name recognition that may lead to contract education, and to serve as an introduction to potential internship sponsors for programs with field-based components. The Alumni Club Builder is designed to help COE units evaluate the goals and strategy for corporate "alumni clubs," cohorts of alumni at individual businesses or organizations where the COE unit may find and connect with prospects.

Successful corporate alumni clubs host events to gather prospective student names; the COE Forum recommends relying on alumni cohorts at each employer to promote such events, building upon the idea of peer-to-peer recruiting. Finally, consider the resources available and assess whether corporate alumni club events can be expanded to include select guests or can be opened to all employees. The steps outlined in this Builder will help COE units select potential employer hosts, weigh the invitation and promotion considerations, and plan a corporate alumni club event.

Use the profile below to set goals for future alumni club events. This profiled institution launched alumni clubs because of its history of serving industry with practitioner faculty frequently teaching at the university. In developing alumni clubs, the profiled institution learned valuable lessons about identifying alumni volunteers and ensuring that events are well-attended by the right people.

### Case in Brief: A Master's University Corporate Alumni Club

This club is designed for traditional alumni and is organized by the central alumni office, though COE unit graduates are welcome to join; the host employer is a software firm with offices near the university campus:

| | | | |
|---|---|---|---|
| **$200-300**<br>Cost of Breakfast Event | **2-4 Events**<br>Per Location, Per Year | **75 attendees**<br>At Alumni-Only Event | **Prospect Offer**<br>Application fee waivers |

### Implementation Advice

Contacts at the institution profiled in the case study below offered the following advice for universities or individual units launching corporate alumni clubs:

- ✓ Identify potential alumni-employee volunteers at regional alumni events
- ✓ Alumni who receive invitations will invite other alumni not registered as employees in university database
- ✓ Alumni-employees know which executives or team leaders should receive special invitations because of a potential for contract education or internship/job placement

## Instructions for Launching an Alumni Club

### Step 1: Gather Information from External Departments and Units

1. Ask the central alumni office if they are willing to share a list of alumni volunteers (not donors to avoid sensitivity) and the names of their employers.
2. If the COE unit maintains an alumni database, determine if the alumni administrator can run a short e-mail campaign designed to motivate alumni to update their contact and employer information. When the alumni information is as complete as possible, export from the COE database as many names of COE alumni and their employers as possible. Alternatively, if the unit does not maintain a database of alumni information, ask program directors for names of active or particularly successful alumni and their employers.
3. Contact the corporate education department at your COE unit and collect a list of contract education partners that have requested a customized program within the past five years.

# Tool #8: Corporate Alumni Club Builder (cont.)

## Step 2: Identify Corporate Hosts

Answer the questions below in the space provided to help your team brainstorm potential corporate hosts.

- Which employers regularly hire your graduates (traditional or continuing education)?

  ________________________________________ ________________________________________

  ________________________________________ ________________________________________

- Which employers have engaged in contract education?

  ________________________________________ ________________________________________

  ________________________________________ ________________________________________

- Which employers participate in advisory boards?

  ________________________________________ ________________________________________

  ________________________________________ ________________________________________

- If applicable, with which employers do continuing education students participate in internships or co-ops?

  ________________________________________ ________________________________________

  ________________________________________ ________________________________________

- Consider the occupations most prevalent at the employers above. Consult market research staff and faculty members about which firms or organizations listed above are most likely to be interested in pursuing continuing education. Circle the three firms where employee occupations are best suited to continuing education.
- Of the employers listed above, star three firms or organizations that employ alumni who actively engage (i.e., volunteer, mentor, serve as adjuncts) with the continuing education unit or volunteer with the main campus alumni group.

The organizations with both circles and stars make the best candidate for a pilot corporate alumni club. After identifying an employer suitable for a corporate alumni club, complete the steps below to refine the purpose of the club and define responsibilities of alumni-employees who volunteer to lead the club.

## Step 3: Articulate the Goals of the Corporate Alumni Club:

Invite contract education, alumni affairs (main campus and/or COE unit-specific departments), the recruitment office, and career services to discuss the goals of the program. Complete the exercises below with these stakeholders.

**Goals**
Check the goals that apply:

- ☐ Offer enrichment to audience (e.g., a faculty member presenting on industry topic)
- ☐ Highlight university goings-on and achievements (e.g., a university staff presenter)
- ☐ Collect the names of prospective students
- ☐ Advertise applicable continuing education programs
- ☐ Establish name recognition among employees
- ☐ Identify internship placement opportunities for current continuing education students
- ☐ Other:________________________________________________________________________

**Strategies**

The COE Forum recommends offering discounts and promotions in conjunction with an event, which makes the event more memorable and special.  Events also ensure that the COE unit can collect the names of those who receive a discount or other type of promotion. *Check the following strategies that the COE unit is willing to pursue*:

- ☐ An event designed for a guest speaker
- ☐ An event designed for mixing and mingling
- ☐ Discounts on courses for alumni (specify type of course:___________________________)
- ☐ Other promotions for alumni (e.g., application waivers, university paraphernalia, tuition discounts, etc.)
- ☐ Discounts on courses for all employees (specify type of course:___________________________)
- ☐ Other promotions for all employees (e.g., application waivers, university paraphernalia, tuition discounts, athletic event promotions, etc.)

**Scope**

Consider budget and staff time and then specify the number of events the unit would like to host at an employer site per year: ________

Contacts recommend about two events per year per employer.

## Step 4: Develop Relationship with Alumni-Employee Liaisons

- Identify one to three alumni at the organization identified in step 2:
    - ○ _______________________________
    - ○ _______________________________
    - ○ _______________________________
- E-mail the alumni identified above and explain the goals of a partnership.  Ask if they are interested in serving as liaisons between the employer and continuing education unit.  Explain that the primary responsibility is organizing [x] number of events per year but that in return they will receive incentives (e.g., bookstore paraphernalia, course discount vouchers for their personal use or for distribution to friends, and/or tickets to main campus sporting events).

## Step 5: Plan an Alumni Club Recruiting Event

Complete the checklist below when launching an alumni club and planning associated events.

**Coordinating with Employer HR Department:**

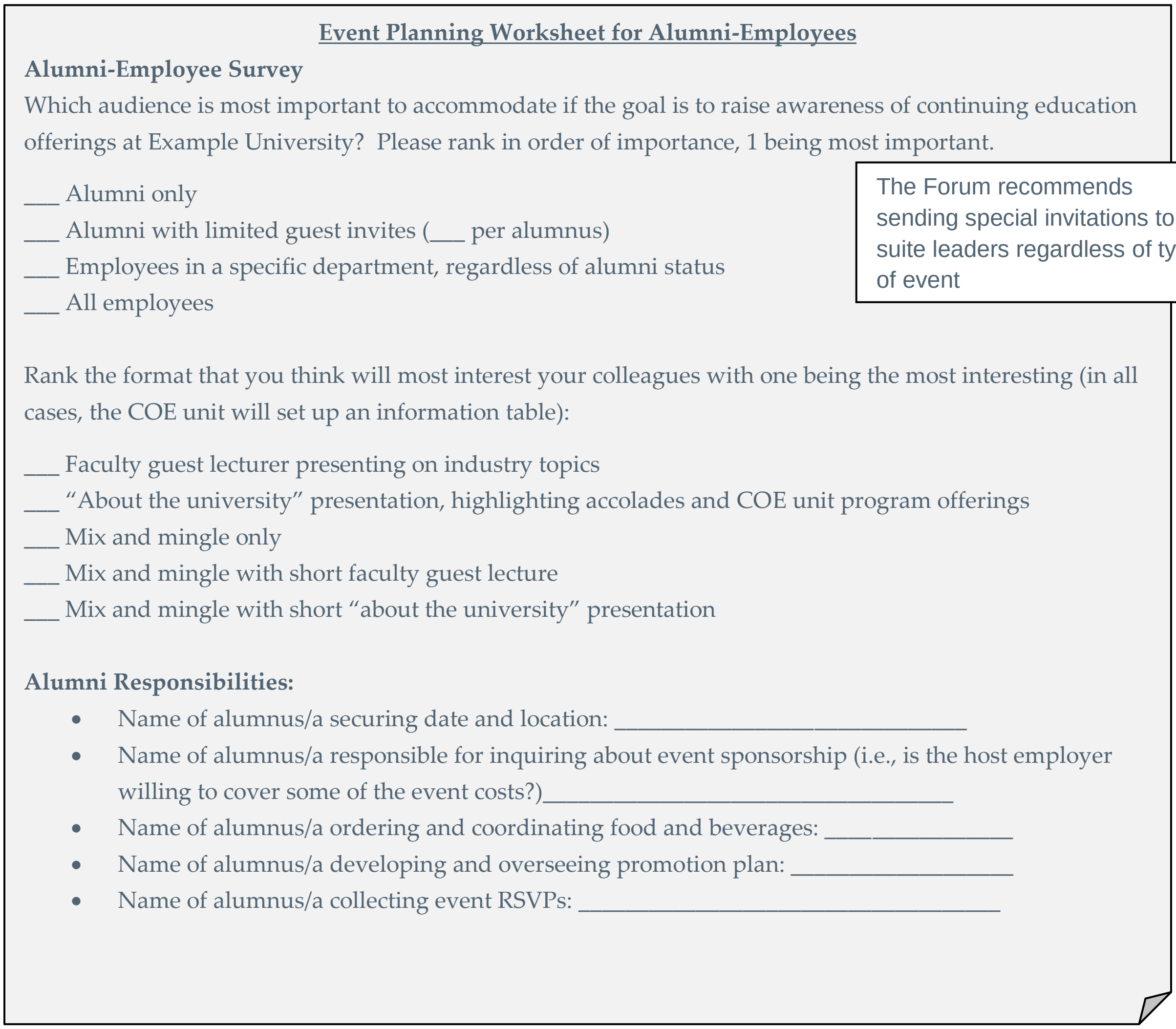
- ☐ Ask for liaison alumni-employee(s) to set up a meeting with COE unit recruiter, HR  representative, and other alumni who would like to be involved in event planning
- ☐ Determine how involved they or another internal party would like to be in the event planning

## Step 5: Plan an Alumni Club Recruiting Event (Cont.)

**Event Planning**

- ☐ Set a budget and assign alumni to inquire about event sponsorship (see worksheet below)
- ☐ Conduct alumni-employee survey and assign alumni responsibilities (see worksheet below)
- ☐ Schedule a guest speaker if applicable
- ☐ Send alumni electronic invitations to distribute
- ☐ Determine who (alumni or university representatives) should reach out to C-suite level guests and offer a personal invitation
- ☐ Determine best way to collect prospective student information and specify information  that should be collected (e.g., via information table, a sign-up sheet,  RSVPs, when distributing discount cards)
- ☐ Determine who from the university will staff
- ☐ Assign event responsibilities (e.g., collecting lead names, greeting guests, answering questions, etc.)

# Tool #8: Corporate Alumni Club Builder (cont.)



## Event Planning Worksheet for Alumni-Employees

**Alumni-Employee Survey**

Which audience is most important to accommodate if the goal is to raise awareness of continuing education offerings at Example University? Please rank in order of importance, 1 being most important.

___ Alumni only
___ Alumni with limited guest invites (___ per alumnus)
___ Employees in a specific department, regardless of alumni status
___ All employees

The Forum recommends sending special invitations to C-suite leaders regardless of type of event

Rank the format that you think will most interest your colleagues with one being the most interesting (in all cases, the COE unit will set up an information table):

___ Faculty guest lecturer presenting on industry topics
___ "About the university" presentation, highlighting accolades and COE unit program offerings
___ Mix and mingle only
___ Mix and mingle with short faculty guest lecture
___ Mix and mingle with short "about the university" presentation

**Alumni Responsibilities:**

- Name of alumnus/a securing date and location: ______________________________
- Name of alumnus/a responsible for inquiring about event sponsorship (i.e., is the host employer willing to cover some of the event costs?)___________________________________
- Name of alumnus/a ordering and coordinating food and beverages: ________________
- Name of alumnus/a developing and overseeing promotion plan: ___________________
- Name of alumnus/a collecting event RSVPs: ____________________________________

# Tool #9: Alumni Leads Passer Sign-Up Form

This tool presents questions that a COE unit might post to alumni before training them to serve in a leads-passing capacity. The sample sign-up form queries alumni about community engagement, helping the recruitment office identify alumni with the connections and community respect needed to serve as a spokesperson. Additionally, outlined expectations connote that the position requires a significant investment of time and effort, helping ensure that only alumni who will take the time to identify genuinely qualified leads will apply. This form is adapted from the Lesley University Advocates program, a pioneer in organizing and incentivizing alumni leads passers. Lesley University graciously provided details about the development of the Advocates Program for this publication.

## Alumni Leads Passer Application

### Position Overview

Alumni leads passers promote Example University's School of Education programs to local teachers, principals, and school district leaders. Once accepted, leads passers receive printed informational materials by mail as well as the contact information of an Example University recruitment counselor, who can answer questions as they arise.

Leads passers will receive $30 for every person who expresses genuine interest in learning more about Example University after a conversation with a leads passer. Before receiving compensation, leads passers must correctly enter prospective students' names and contact information in the recruitment database, accessible through a web portal. A recruitment counselor will then contact interested prospective students via phone and/or e-mail.

### Position Expectations

- ✓ Complete an online training module before generating new inquiries
- ✓ Enter a minimum average of five prospective student names in the database each month

### Background Information

First Name

Last Name

State of Residence

Mobile Number

E-mail Address

Street Address

City

Zip

**Are you a graduate of Example University?**

☐ Yes ☐ No ☐ I attended Example University courses but did not complete a program

**If you attended courses within a program or completed an Example University program:**

- Select the name of the program:
- Were program courses delivered wholly online? ☐ Yes ☐ No
- If not delivered wholly online, enter the name of the city where the program was held:

### Short Answer Questions

- ➢ Please explain your current occupation and how this role prepares you for the alumni leads passer role?
- ➢ Please describe your community involvement (e.g., volunteer or board member roles) and explain how your experience in these positions will help you connect with prospective students and/or will prepare you to serve as a spokesperson for Example University's professional development courses/programs.

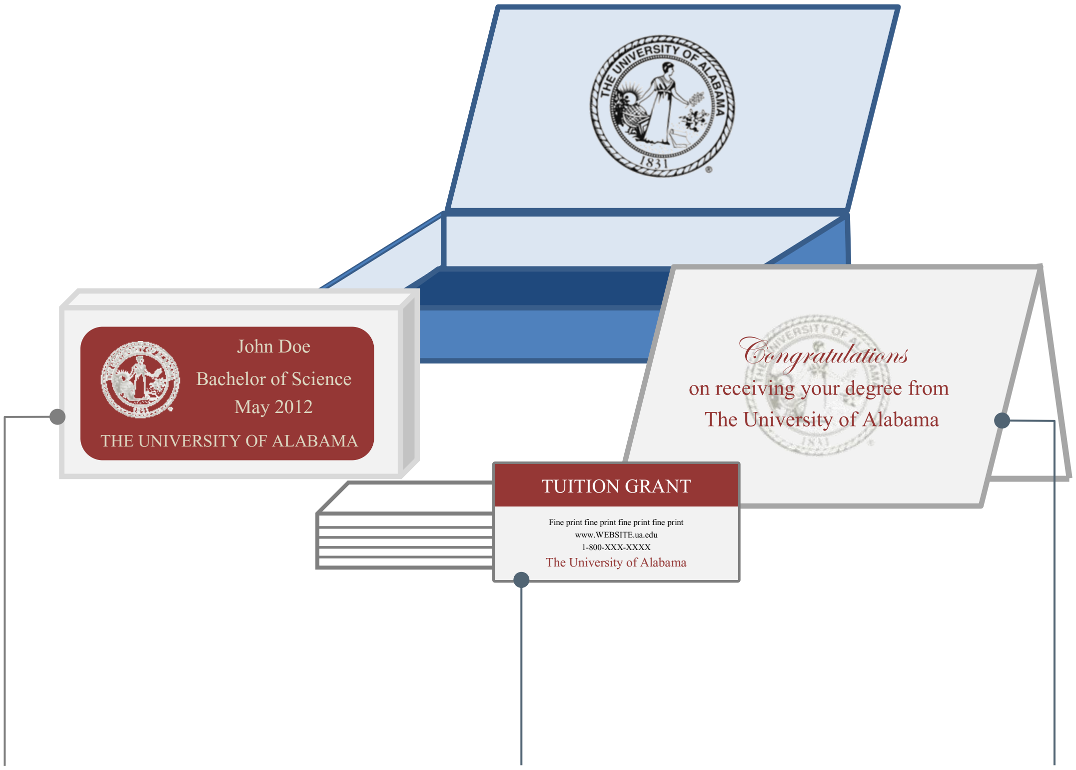
# Tool #10: Anatomy of a WOM-Building Gift

The University of Alabama's College of Continuing Studies has developed a strong word-of-mouth campaign, "Build on Bama," by providing recent online graduates with a gift as well as transferrable next-course-free vouchers, provided the student is admitted to another Distance Learning program. In addition, alumni can pass the vouchers on to friends, who can use it to help kick start their own distance learning program. This tool provides a replica of the contents of that graduation gift including the free course vouchers.

Implementation Note: As you consider the University of Alabama's word-of-mouth campaign, think about the kinds of gifts that would be easy and inexpensive to assemble and deliver. One of the keys to Alabama's success is that the administrative and fulfillments costs for the gifts are very low. The gifts are entirely fulfilled by the on-campus print shop and, once mailed, the only administrative workload comes from those alumni or prospective students who want to "cash in" the free course voucher. Also give thought to the groups of students and/or alumni who would react most positively to the campaign. The University of Alabama's campaign was successful in part because they targeted their gifts to online graduates, a group of students that didn't get to develop as strong a tie with campus.

## Recent Alumni Graduation Gifts

*Received via mail shortly after graduation*



**Marble Paperweight**

Engraved by the print shop, the paperweight features the graduate's name, awarded credential, and the month/year of graduation. This is a token similar to what students would be able to purchase from the campus bookstore.

**Tuition Vouchers**

Featuring a website and phone number recipients can use to get more information, the vouchers feature the "free course" carrot prominently.

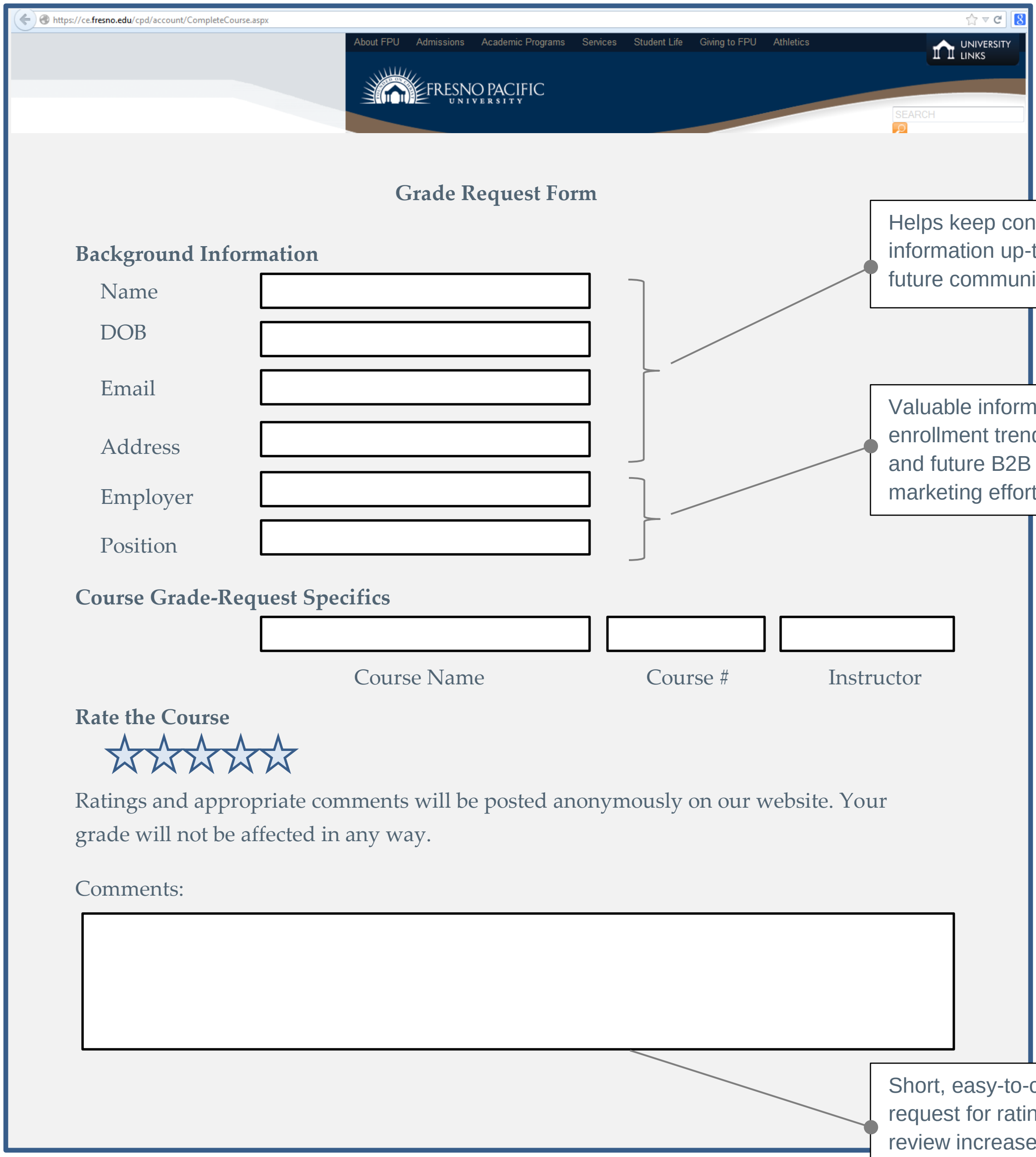
**Congratulatory Letter**

This letter, written and signed by the Dean of the division, congratulates the graduate on his/her accomplishment, explains the gift, and introduces the tuition vouchers.

# Tool #11: Course Star-Rating Feedback Form

Search and Shop consumers place a great deal of value in the experiences of consumers like them. Fresno Pacific University's Continuing Education unit acknowledged this when they devised a way of incorporating course reviews and ratings on each course's webpage. One key to this high value-add component of their marketing and recruiting is a request for ratings and reviews that is well-timed and easy to grant. Students receive the ask when they are submitting their request for a grade, the capstone activity in completing their professional development course. At the bottom of that form is a space to rate and review their course. Nearly 100% of students complete the form. This tool provides a replica of the form Fresno Pacific uses to request student feedback.

*With thanks to Fresno Pacific University's Continuing Education unit for sharing their practice.*



**Grade Request Form**

**Background Information**

Name

DOB

Email

Address

Employer

Position

**Course Grade-Request Specifics**

Course Name

Course #

Instructor

**Rate the Course**

☆☆☆☆☆

Ratings and appropriate comments will be posted anonymously on our website. Your grade will not be affected in any way.

Comments:

Helps keep contact information up-to-date for future communications

Valuable information for enrollment trend analytics and future B2B and marketing efforts

Short, easy-to-complete request for rating and review increases likelihood of completion

# Tool #12: Follow-Up Conversation Scripting Tool

Programs with dedicated frontline student/prospect services staff typically equip call center staff with tried and tested scripts. However, not every unit (or every program in every unit) employs call center staff and instead may rely on staff with other responsibilities (e.g., program directors) or student workers for prospect outreach. This tool offers simple guidelines to make sure that whoever particpates in prospect phone outreach gathers the information needed to fill out prospects' profiles. Additionally, the tool maps prospect responses to segmentation tactics featured in Tools #16, 17, and 18: Segmentation Briefing Sheets on Demographics, Motivations, and Actions Taken and Tool #2: Guidelines for When to Call a Prospect.

**Implementation Note**
Establish a process and shared space for recording prospect responses. Discuss options with IT.

### Phone Conversation Script

**Corresponding Segmentation Tactic**

Fill Out Prospective Student Profiles

1. "I noticed you are undecided about selecting a program."
2. "Did you know that some employers offer tuition reimbursement? Who is your current employer?"

Questions build upon optional inquiry fields that were left blank.

Illuminate a Prospective Student's Motivations

3. "What are some of the considerations you're weighing as you choose a program? Which program do you think you're most ready for?"
4. "What factors will affect your program start date? What is your estimated starte date?"
5. "What are your educational goals? Why are you interested in enrolling in a degree or certificate program?" *[Note to recruitment advisor: try to categorize responses into one of the categories below.]*

   Possible Prospective Student Answers:
   a. To advance in my current career
   b. To change careers
   c. For personal enrichment

6. "Do you have any questions or concerns about returning to school?" *[Note to recruitment advisor: be prepared with thoughtful responses to time management concerns, any opportunities your instituion offers for prospective students to test the LMS or test a course, and success anecdotes.]*

**Segment by Motivation**
Consider motivation when differentiating communication: **See Tool #17: Segmentation Briefing Sheet: Motivations**

Understand a Prospective Student's Demographic

7. "Which institutions have you attended in the past?"
   a. "What did you study? What did you like about those courses? What study tips will you apply in future courses?"
   b. "What challenges did you face at your last institution?"
8. "Tell me about your career history."
9. "What responsibilities occupy most of your time? Let's talk about flexibility within those obligations and Example U's curriculum."

**Segment by Demographic**
Consider demographics when differentiating communication: **See Tool #16: Segmentation Briefing Sheet: Demographics**

# Tool #13: Inquiry Form Builder

COE units face a daunting set of decisions when constructing their inquiry or “request for information” forms: should they use a short form that reduces barriers to completion but collects incomplete information or a long form that intimidates some prospective students but provides rich data on those who follow through and submit the form? Still other units divide their traditional inquiry questions among several sequential forms pushed to prospects through emails throughout the recruitment pipeline. This tool outlines essential and secondary information, tips for constructing an inquiry form, and guidelines for selecting the form format that best matches your prospect audience.

## Most Essential Information

The sample form below includes the essential questions that will serve as the entirety of a short inquiry form or as the first half of a long form (see below for secondary information that make up the latter half of a long form). This form is designed as a general inquiry form accessed from the COE unit main website.

**Request-for-Information Form: Example University**

*Please complete the questions below, and we will send more information to the e-mail address you provided.*

1. Please enter your name.*

   __________[First Name]______________

   __________[Last Name]______________

**Make Clear Required Fields**
If required fields are clearly marked, the form appears more manageable. Prospects who want personalized outreach can still complete easy-to-find optional fields.

2. Please enter your e-mail address.*

   _____[address@example.com]______

3. Please indicate your military status if applicable:
   - ☐ *Active duty*
   - ☐ *Veteran*
   - ☐ *National Guard reserve*
   - ☐ *Military family member*
   - ☐ *DOD civilian*

**An Implicit Welcome Message**
Asking about military status is a subtle way to show the community that the university works to accommodate military members and their families.

4. Please select the area of study you are most interested in pursuing. If you’re having a difficult time selecting just one interest, please check the “undecided” box and a recruitment advisor will be in touch.*

   ✓ *Allied Health* ☐ *Teacher Preparation* ☐ *Business*
   ☐ *Criminal Justice* ☐ *Undecided*

   If you know the name of the specific program to which you will apply, please select the program name from the drop down menu below in addition to checking one of the boxes above (e.g., check “Allied Health” above and select “PhD in Nursing Science” from the menu above):

   ☐ ▾

**Discipline versus Program-Specific Data?**
Broad disciplines allow for e-mail customization without forcing prospects to commit to a specific credential. Consider collecting part 2 of question 4 over the phone or in a subsequent form.

5. What is your current state of residence?

   ☐ ▾

**Required*

**Implementation Note**
Gathering information about home state helps staff prepare to meet state authorization requirements.

## Secondary Information

### For a Long or Subsequent Inquiry Form

COE units typically feature the following questions in longer version of the basic inquiry form, in which a combination of the questions below are marked as optional. Other units gather the answers to the questions during phone conversations with prospects, and still others send prospects incremental surveys featuring the questions below at various points in the recruitment pipeline.

6. If you would like to receive a phone call from a recruitment advisor, please enter your phone number.
   ___________[101-011-1100]_______________

Contacts report that making fields like "phone number" optional can bolster prospects' trust in the institution.

7. What is your intended program start date?
   ☐ *Fall 2013* ☐ *Spring 2014* ☐ *Undecided*

8. What is your highest level of education?
   - ☐ *High school or GED*
   - ☐ *Bachelor's degree*
   - ☐ *Associate's degree*
   - ✓ *Graduate or professional degree*
   - ☐ *Some post-secondary course*
   - ☐ *Some graduate courses*
   - ☐ *Some undergraduate courses*
   - ☐ *Unsure*

**To save space**, consider building a drop-down menu for responses.

9. Have you ever enrolled at Example University?
   - ☐ *Yes*
   - ✓ *No*

10. What is your intended program start date?
    - ☐ *Fall 2013*
    - ✓ *Spring 2014*
    - ☐ *Undecided*

**Implementation Tip**

Institutions with flexible start dates may frame the options as such:

- ☐ In eight weeks
- ☐ In sixteen weeks
- ☐ In more than sixteen weeks

11. Who is your current employer
    Type employer name here:

12. In what year were you born?

## Choosing between Long Initial Form or Series of Subsequent Forms

| | Advantage | Disadvantage |
|---|---|---|
| **Single Short Form** | Prospects face minimal barriers to expressing interest | The recruitment office collects a bare minimum of contact information with little fodder for personalization of future communications |
| **Single Long Form** | Prospects may prefer to give as much information as possible in one form. | A long form may deter prospects from submitting an inquiry |
| **Series of Forms (2-3 Inquiries)** | Follow-up forms allow COE units to keep the initial inquiry form short while still collecting a wealth of information | Students may become annoyed with a series of surveys that collect personal information. A portion will never complete subsequent forms |

The best approach to inquiry form delivery (single versus multiple) varies by student demographics and program type. For example, a career-advancing certificate program prospect might value a single, short inquiry form because he or she associates some urgency with enrolling and completing a certificate. However, a certificate program designed for enrichment (e.g., creative writing) attracts prospects who are willing to complete a long form and appreciate personalized communication.

### Conduct A/B Testing

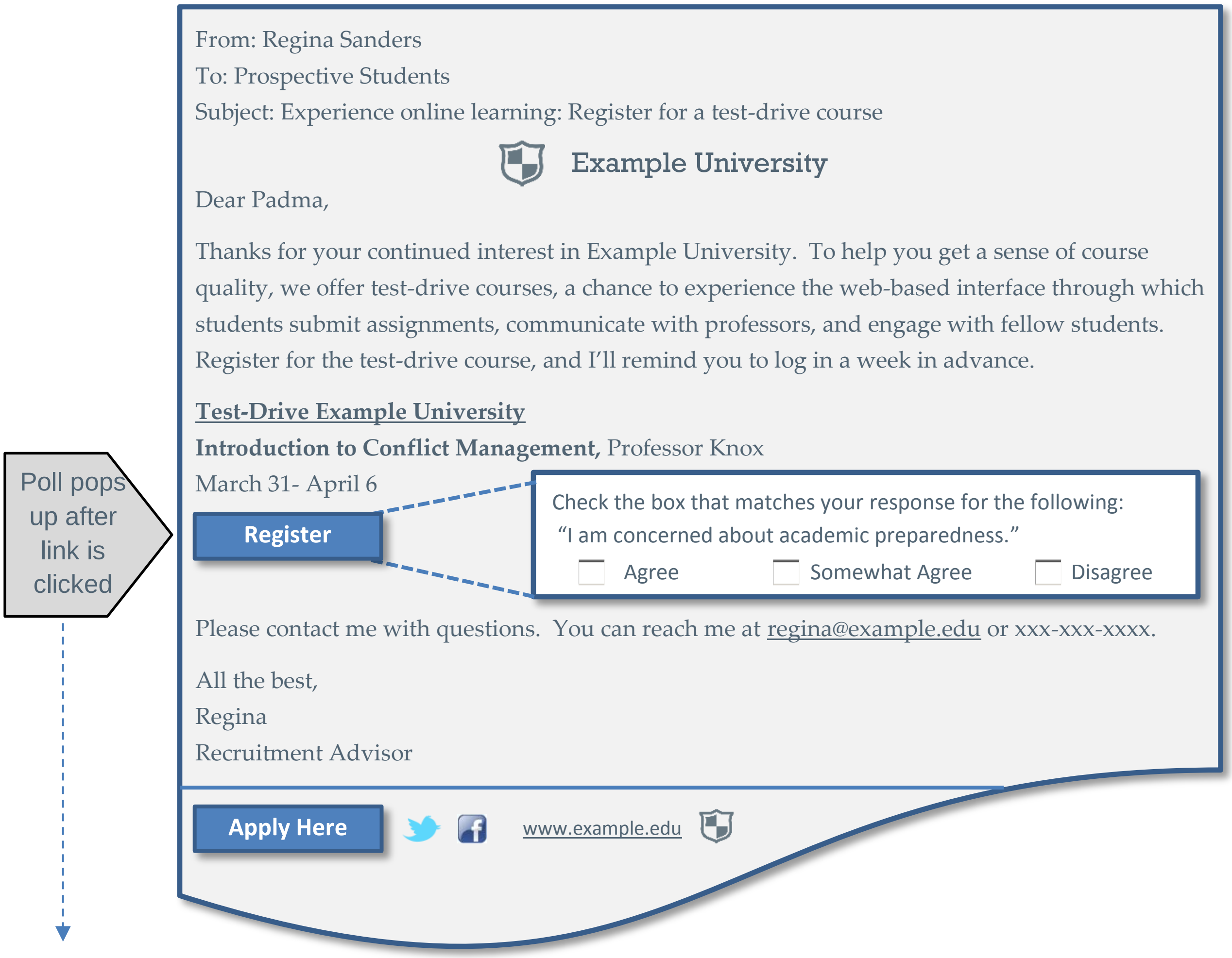
Many units have found A/B testing to be effective in determining exactly the right inquiry form format. Test strategies against one another to determine whether the recruitment staff gathers more prospective student information with all non-essential questions as optional fields in a single inquiry form or whether a series of follow-up forms yield more responses and richer information. Additionally, use A/B Testing to test the sequence of questions and to determine the best size for your forms in terms of pixel size.

### Outline Intended Application of Prospect Responses

The COE Forum recommends that all information collected in inquiry forms or during conversations corresponds to a planned piece of personalized correspondence. In other words, collect information about military status only if marketing staff have dedicated resources to developing military-specific phone scripts, email campaigns, or military-oriented paragraphs that are incorporated into otherwise general email messages. Consider the role each piece of information collected from the inquiry form will play in planned correspondence before asking students to provide a response and before selecting the type of inquiry form most appropriate for testing.

# Tool #14: Quick Poll Questions Guide

Many COE units struggle to get a full understanding of prospects' needs and motivations, especially when many prospects shy away from long inquiry forms. Without a detailed form response, recruitment advisors often call these prospects over the phone to gather missing details but sometimes fail to do so. In response, a few innovative institutions ping prospects with a one-question poll as an intermediate step between a call-to-action link (e.g., a "register" button) and the corresponding landing page. This tool provides one design example for linking quick, pop-up polls to URLs embedded in emails and offers poll questions that contribute to a prospect's profile.



From: Regina Sanders
To: Prospective Students
Subject: Experience online learning: Register for a test-drive course

Example University

Dear Padma,

Thanks for your continued interest in Example University. To help you get a sense of course quality, we offer test-drive courses, a chance to experience the web-based interface through which students submit assignments, communicate with professors, and engage with fellow students. Register for the test-drive course, and I'll remind you to log in a week in advance.

**Test-Drive Example University**
**Introduction to Conflict Management,** Professor Knox
March 31- April 6

Register

Check the box that matches your response for the following:
"I am concerned about academic preparedness."
☐ Agree ☐ Somewhat Agree ☐ Disagree

Please contact me with questions. You can reach me at regina@example.edu or xxx-xxx-xxxx.

All the best,
Regina
Recruitment Advisor

Apply Here www.example.edu

Poll pops up after link is clicked

## For Every Call-To-Action Link, Insert One-Question Poll

Call-to-Action Link in E-mail

- Download a Curriculum Map
- Schedule an Appointment with Recruitment Counselor
- Register for Info Session
- Watch Video Testimonial
- Register for Freemium Content (e.g., Test-Drive Course)
- Register for Webinar

| Sample Poll Prompts | Corresponding Recruiter Actions | |
|---|---|---|
| | **"Agree"** | **"Disagree"** |
| "I am satisfied with the expected academic rigor." | Classify as Hot Lead | Send faculty profiles |
| "I have the support of family/friends /employer." | Classify as Hot Lead | Offer time management tips |
| "I am concerned about financial burden of tuition." | Send financial planning info | Classify as Hot lead |
| "I have a clear idea of my academic goals and how they relate to career goals." | Classify as Hot Lead | Refer to subject matter expert |

# Tool #15: Cold Lead Email Preference Template

For many adult students, especially those considering a full degree and balancing complicated personal responsibilities, the decision cycle around pursuing continuing education is a long one—and those who linger in indecision are classified as cold leads. As such, although COE leaders know that they don't want to bother cold leads with too many emails, keeping in touch with them is important because cold prospects may become interested in the program later, or they may pass information about a program to friends. An email preference survey allows prospects to opt into themed email campaigns that both help the COE unit stay in touch and help COE unit campaigns feel less like spam. Furthermore, such a survey catalogs prospective students' interests.

The E-mail Preference Template highlights sample categories of messages, about which prospects may be interested (or uninterested) in receiving messages but which do not pertain directly to recruiting and admissions. Send a message prompting cold prospects to specify their e-mail preferences in a survey like the one modeled below. Using the sample email themes as a guide, COE units can tailor message themes based on the university's strengths and the prospective students' programs of interest.

## What Would You Like to Know About Example University?

*Email Preferences Survey**

Would you like to specify the type of messages you receive from Example University? In addition to e-mails from our recruitment and admissions advisors, we at Example University want to share news from our faculty, staff, and students; we can customize the e-mail communication you receive based on the preferences you select below. Simply check the boxes that correspond to the types of messages you would like to continue to receive.

✓ You will receive emails about topics with check marks next to the topic name

☐ You will *not* receive emails about topics *without* check marks next to the topic name

### Continuing and Online Education Preferences

✓ **Plan for Tuition Costs**
Information about financial aid and financial planning

✓ **Career Tips**
Our career counselors offer their advice for interviewing, networking, and job searching

☐ **Stress Management Tips**
Academic advisors highlight their most effective advice for juggling family, job, and school responsibilities

☐ **Geography-specific events**
Stay in the know about events going on in your region

**Adult-Friendly Content**

Interviews with hundreds of COE units show that COE prospective students are most interested in career- and financial planning-related content. Consider developing e-mail content around these themes to engage across a long decision cycle.

### Engineering Department Preferences

☐ **Engineering Faculty and Leaders**
Faculty biographies and their advice for prospective students

✓ **Industry Insights**
Faculty and alumni experts comment on trends in the field

☐ **Student Profiles**
Student profiles and information about student community

**Implementation Tip**

Use existing email content from department and university communication teams, saving COE staff time and adding variety to prospective students' inboxes.

# Tool #15: Cold Lead Email Preference Template (cont.)

*Email Preferences Survey (Continued)**

**General Email Preferences**

- ✓ **Live streamed lectures and webinars**
  Learn something new from Example University's top professors
- ☐ **University-wide news**
  General university announcements
- ☐ **University arts and music**
  Discover the artists visiting our stages and galleries and learn how to purchase tickets
- ✓ **University athletics announcements**
  Follow the highlights from Example University's 15 varsity teams

To change your preferences for e-mails from our admissions office about prospective student events, applications, and other student-university transactions, please visit www.example.edu/unsubscribe.

**Spotlight on the Wider University**

Highlighting the positive attributes of the university as a whole demonstrates the value of pursuing continuing education at a university recognized in the community.

*Adapted for a prospective student audience from Cornell University's Office of Alumni Affairs

# Tool #16: Segmentation Briefing Sheet: Demographics

Demographics data plays an important role in segmentation—though not necessarily on its own. Information about age, sex, and professional status, among others provide valuable insight into the preferences and expectations of prospective students. It would be a mistake, however, to rely solely on demographic information to segment and customize interaction. As one expert from the banking field, which has a long history with segmentation practices, noted, “two individuals can look identical for all intents and purposes—same age, same income, same educational background—and be in completely different places in their lives.”

Demographic data is most useful for blunt segmentation purposes—applied introspectively to current students to identify potential hotspots to target marketing and recruiting efforts and directed externally to customize communications with prospects. If you pursue the latter option, the COE Forum recommends doing so with proper attention paid to the words of the banking expert above. To get the most use out of demographic information, cross segment with more nuanced information about motivations for returning to school (see Tool #17: Segmentation Briefing Sheet: Motivations for more information).

This tool will outline the most commonly used demographic parameters used for segmentation as well as the unique features of various demographic groups. It will then explore how demographics are used to segment prospective students at one case institution.

## Common Demographic Groups and their Key Features

| Demographic Parameter | Source of Data | Inferences and Deductions that Can be Used to Customize Communications, Develop Strategy, etc. |
|---|---|---|
| Age | • Inquiry forms*<br>• Purchased lists<br>• Communications with prospect | **Motivations:**<br>Younger (22-25): recent college graduates are less likely to have specific professional development goals in mind and are more likely to be pursuing graduate-level education as the logical next step on the educational path<br>Middle-age (25-55): are more likely to be re-approaching education for professional reasons<br>Older prospects (55+): are more likely to be interested for non-professional reasons |
| Gender | • Possibly inquiry forms*<br>• Purchased lists<br>• Communications with prospects | **Concerns**:<br>Women: more likely to have questions about convenience and schedules and to doubt their qualifications. They are also more likely to be dissatisfied with pre-enrollment services<br>Men: are less likely to inquire and to have admissions and funding questions when they do |
| Location | • Inquiry forms*<br>• Purchased lists | **Hotspots**:<br>This information can be used to identify the most likely locations the customers in each of the segments may be found and, therefore, further help determine how to reach them |
| Professional status | • Possibly inquiry forms*<br>• Purchased lists<br>• Communications with prospects | **Motivations**:<br>Employed: more likely to be interested in additional credentials or switching fields<br>In a troubled field: likely looking to re-skill<br>Retired: Most likely either looking for enrichment or an encore career |
| Previous education | • Possibly inquiry forms*<br>• Purchased lists<br>• Communications with prospects | **Likelihood to need support:**<br>Students transferring from community colleges, first generation students, and recent graduates: all more likely to need additional assistance |

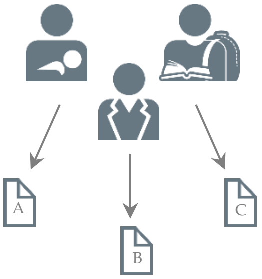
*For more information about designing inquiry forms that capture valuable information while remaining appealing to prospective students, see Tool # 13: Inquiry Form Builder.

# Tool #16: Segmentation Briefing Sheet: Demographics (cont.)

## Demographics Segmentation at Work: Mini-Profiles

### University of Pennsylvania's Professional and Liberal Studies Plans to Use Demographics to Push Outcomes Collateral

Though program of interest is the primary factor influencing communication content, University of Pennsylvania's Professional and Liberal Studies is in the process of implementing a practice of using demographic information to identify segments of prospective students that are likely to have significantly different needs from and expectations of their return to education. Contacts identified those segments and their unique features by analyzing trends in current students 'and past prospects' questions and concerns. Some of the microsegments they consider are military students, job market re-entrants, and community college transfers. Once classified, prospects receive "students-like-me" profiles that explore the experiences and outcomes of students from the same microsegment. Contacts believe that, by addressing the dominant features, concerns, and motivations of the segment, the profiles will help prospects envision their success at the University of Pennsylvania.



Demographics data allows recruiters to provide prospects with content that helps them envision their future with the institution.

### Capitol College uses Demographics to Develop Strategic Growth Plans

Capitol College is a small, private institution with approximately 1,200 students. It has carved out a unique STEM and computer science/cybersecurity training niche to meet the needs of local corporations (mostly contractors like Honeywell and CSC and government agencies like the National Security Agency and the Department of Homeland Security). While Capitol's graduate school does not self-identify as a continuing and online education unit *per se*, all seven of the graduate programs it offers are exclusively online and cater to full-time employees.

Demographic information about its prospects, specifically their geographical location, has helped Capitol College develop a data-driven expansion plan.

Capitol has traditionally relied on word of mouth to grow enrollments in and around the mid-Atlantic region. However, a recent analysis of inquiries discovered that an increasing number of leads were coming from Arizona, California, and Texas. With this information in hand, Capitol has developed a strategic growth plan that invests resources in these states. Contacts expect their geographical segmentation and targeting to drive a 12% annual enrollment growth.

# Tool #17: Segmentation Briefing Sheet: Motivations

One danger of segmentation is settling on a parameter that draws meaningless lines between prospective students. Just because you can classify your prospects into males and females, professionals and unemployed, and so on does not mean their primary concerns about and interests in returning to school stem from—or are in any way related—to those features. The banking industry ran into this unhappy truth about segmentation several years ago. They realized that segmenting according to life changes was far more effective. By accessing motivations, the banks were able to make a stronger case for how they could support those life changes.

Segmenting according to motivations is a powerful way of indicating to a prospective student that a specific institution or program is best able to help accomplish their goals. This tool will outline how to identify individuals in each microsegment as well as their unique shopping behaviors.

Implementation note: exact identifying features used to classify a prospect into a motivational segment, decision timeframes, communication preferences, etc. are likely different for each organization's target population—and even within an organization's portfolio. This tool synthesizes members' lessons learned into a guide for staff to create their own motivational segment profiles.

## Key Motivational Categories

Below are descriptions of the motivational categories uncovered by 100+ conversations with COE marketing leaders. Use the profiles to understand how to identify and cater to the needs of each microsegment.

**Constituency 1:**

**Enrichment-Seekers**

**Description**: Typically older individuals considering a return to education for personal improvement reasons unattached to professional growth; less likely to be looking for "quality" and more likely to make decisions according to loyalty and convenience.

**Identification Checklist:**

- ☐ 55+ years old
- ☐ "Leisurely browsing" tone during conversations
- ☐ Unemployed
- ☐ Interested in individual courses

**Decision Timeframe**: ~10-16 weeks

**Consideration Pool**: 2-3 programs, quite possibly multiple at the same institution

**Desired Product**: Individual courses

**Cross or Up-sell**: Financially comfortable individuals (as suggested by career information) might be interested in an encore career in a more humanitarian field. Such individuals could be interested in a certificate.

**Critical Information to Address in Communications**:

- ✓ Variety of courses to choose from
- ✓ Course delivery
- ✓ Schedule
- ✓ Institutional loyalty (target alumni or family and friends of alumni)

# Tool #17: Segmentation Briefing Sheet: Motivations (cont.)

**Constituency 2:**

**Hesitant Graduate Student**

**Description**: Typically younger prospects (22-25 years old), recently departed from undergraduate programs, who are considering a master's program but are not certain. These prospective students have of questions about most everything—the institution, specific programs of interest, faculty members, etc—because they have not done as much research or spent as much time ascertaining their needs and preferences. They typically reach out to the institution earlier in their decision-making process and they are more swayable than other microsegments. Hesitant graduate student are more likely to be interested in certificates or freemium offerings as a "test run."

**Identification Checklist (**a prospect needs only have a majority of these features to confidently placed in the microsegment)**:**

- ☐ 22-25 years old
- ☐ Graduated from college within the last 2 years
- ☐ Stated interest in a graduate degree program
- ☐ Has many questions and undefined needs
- ☐ Takes more than 2 days to respond to emails from the institution

**Decision Timeframe** (from start of active research to application submitted): 30+ weeks

**Consideration Pool**: 3-4 programs

**Desired Product:** Master's degree

**Cross/Up-sell**: Could be sold on a certificate that counts toward a graduate degree

**Critical Information to Address in Communications**: (in addition to the basic information about cost, quality, and outcomes that most microsegments desire):

- ✓ Reputation of school overall
- ✓ Reputation of school in field of study
- ✓ Faculty
- ✓ Availability of freemium resources

**Constituency 3:**

**Career Builders**

**Description**: Typically 25+ years old, seeking additional education for professional mobility or certification. These prospective students will have done their homework. They will reach out to the institution later in their decision-making cycle when they have specific questions the answers to which they know they cannot find on the website. They will expect prompt responses to questions and will respond promptly themselves.

**Identification Checklist**:

- ☐ 25+ years old
- ☐ Employed
- ☐ Reach out with specific questions
- ☐ Respond to emails and phone calls within 24 hours

**Decision Timeframe**: ~16 weeks, ~24 weeks if interested in a master's degree

**Consideration Pool**: 2-3 programs

**Desired Program**: Certificates and certification courses; master's degrees if looking for a career change or a more substantial move up the career ladder

# Tool #17: Segmentation Briefing Sheet: Motivations (cont.)

**Cross/Up-Sell:** Additional certificates and executive education courses that will help in the "journey to the corner office"

**Critical Information to Address in Communications:**

- ✓ Faculty's practical experience in the field
- ✓ Reputation of the school in the field
- ✓ Specialized accreditation
- ✓ Career status of alumni
- ✓ Tuition reimbursement and preferred provider arrangements with employers

If a motivational group that you commonly encounter is missing from the profiles above, you can use the fields of information to guide your own brainstorming.

## Motivational Segmentation in Action at Seton Hall University

Stand-out institutions seek to classify prospective students into motivational categories as early as possible, recognizing that motivations greatly influence the type of information the prospect wants and how quickly they want it. Seton Hall University does this, despite a limited budget, by developing a communications plan that encourages individuals to respond. Once the admissions advisor is in a one-on-one conversation with a prospect via email or phone (75% of all prospects), he can identify the prospect's motivations using the trigger actions outlined above. This contact estimates that he can classify 90% of prospects from the first conversation. Once he has identified the motivation microsegment of a prospect, the contact customizes the information he provides the prospect in light of the critical information outlined above. Anecdotally, he notes that motivational segmentation saves him time by helping him deduce the ideal content to deliver to a prospective student; an increase in conversion rates suggests that his strategy is just as helpful in the eyes of the prospect.

# Tool #18: Segmentation Briefing Sheet: Actions Taken

Though segmentation is still in its nascent stage within many continuing, online, and professional education units, progressive marketing teams have embraced the practice of segmenting according to actions taken. It can be a powerful tool for identifying those leads that are most likely convert and allocating attention accordingly. The challenge of segmenting according to actions taken is developing a set of identifiable trigger behaviors.

This tool will provide a baseline set of those behaviors as well guidance for adding to the list.

## Action-Based Segmentation Triggers

The chart below presents the behavioral profiles of hot, warm, and cold leads. You can add to the list of triggers to any additional behaviors corresponding to communication stimuli. However, the list of triggers should be manageable—typically 5-15. The Forum also advises that you select only those triggers that are easy to notice—ideally they are automatically detected and recorded by a CRM or other system. Remove from the list any triggers that would be difficult or impossible to identify given your current technological capabilities.

| Behavioral Trigger | Hot | Warm | Cold |
|---|---|---|---|
| Opens emails but doesn't click on links | • | • | • |
| Used the net price calculator | • | • | • |
| Explored credit transfer | • | • | • |
| Responds to first or second email | • | • | |
| Clicks on a link to register for a course or program by never completed the registration | • | • | |
| Proactively asks questions before submitting an inquiry form | • | • | |
| Responds to 3rd+ email | • | • | |
| Registers for an event | • | • | |
| Attends an event | • | | |
| Attends a one-on-one meeting | • | | |
| Responds to first or second email within 12 hours of receiving it | • | | |
| Starts application but does not complete it | • | | |
| Calls an advisor | • | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |

1

**Not Enough on Their Own**

These triggers on their own are not enough to place prospects in a segment. Consider how each behavior might differ according to extent of motivation (e.g., someone who explores credit transfer well before intended start date or start of academic term is likely quite interested and should be considered either warm or even hot; someone who opens emails but doesn't engage in any other way may not be comfortable on the internet and is therefore a good candidate for phone follow-up).

2

**Invest Attention Here**

These are actions of an interested prospect. Develop communication plans for these prospects that feed them information and gradually move them through the funnel.

3

**Hot Leads**

These actions are indicative of significant interest in a program. Make sure these prospects have all the information they need (possibly through accelerated communication plans) and a high-touch experience, if they seem to need one (i.e., if they haven't exhibited a preference for self-service).

# Tool #18: Segmentation Briefing Sheet: Actions Taken (cont.)

## Features of the Hot, Warm, and Cold Segments

The schematic below explains the various features of constituents of hot, warm, and cold microsegments. Use this information to develop a communication strategy that caters to the characteristics and preferences of each group.

| **Hot**<br>Motivated and/or self-sufficient | **Warm**<br>Interested but needs support or a nudge | **Cold**<br>Shopping; little intention of applying |
|---|---|---|
| • Typically seeking education for professional reasons; these prospects have done their homework and know what they need to do to complete the application<br>• Use phone conversations and personal emails to ensure informational needs are met as soon as possible | • These prospects are interested but not sold on the program; they will take some initiative, but still need encouragement down the path to application<br>• Court over the course of several emails and conversations; do not smother with attention | • These prospects likely feel no immediate pressure to attain more education; they are perusing the market and for many of them, no amount of hand-holding will lead them to apply<br>• Provide regular emails and offers for more high-touch interaction |

**Accepting the long tail…**
Many institutions realize that the adult student decision-making cycle can be on the order of years for some prospects and therefore provide long-term communications to their cold prospects. One institution reports that 5-10% of their applications each cycle come from prospects who had been inactive for more than six months and two percent of them had been inactive for more than a year. As a result of this behavior, it is difficult to know when to stop communicating with long-cold prospects.

**…And letting “prospects” go**
On the other hand, the majority of those prospects that go silent after six months of alerting the institution to their presence will not reactivate in the traditional sense—they will never fill out an application. Smart institutions have realized, however, that this does not make them useless. Sophisticated institutions are able to find value in this group by identifying “influencers” and targeting newsy material to them that they can forward on to others in their network.

# Tool #18: Segmentation Briefing Sheet: Actions Taken (cont.)

## A Mini-Profile of Action-Based Segmentation

Embry Riddle Aeronautical University Worldwide uses a hot-warm-cold segmentation scheme based on time in the funnel and actions taken to determine type and frequency of communication to prospects. Time in the funnel earns the prospect a basic hot, warm, or cold classification. Actions taken add a further level of lead scoring and communication customization. For example, “Hot App” is a designation for leads that recently submitted an inquiry form and started an application soon after. “Warm Re-engaged” is a designation for leads that were silent for a long period and re-initiated activity (ERAU WW works with many deployed military personnel). ERAU WW developed a communication plan for each of several designations.

This methodology was developed in response to a 90% stealth representation in the application pool—primarily because Worldwide staff were letting so many prospects slip through the cracks or fall of the radar.

The new practice, along with the automated workflow creation that went into developing it, has yielded impressive results. Not only have conversion rates gone up, the number of complaints received from irate prospects who weren’t receiving enough (or any) attention has drastically fallen.

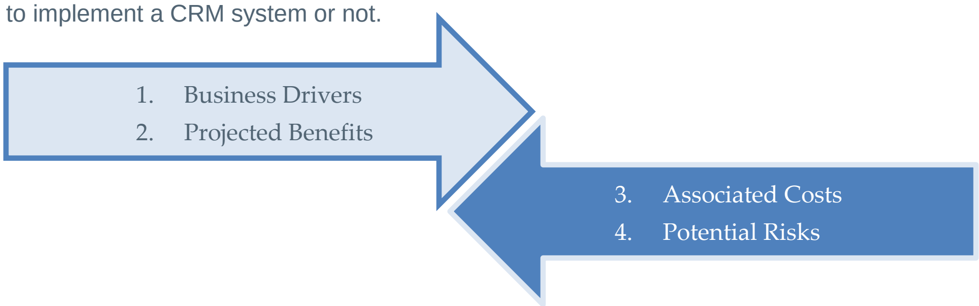
# Tool #19: CRM Business Case Template

Developing a sound business case for CRM is the first step toward a robust implementation; it is critical for determining whether a CRM system is an attractive solution. Without a business case, implementers are more likely to underestimate cost, downplay risks, and overlook barriers to success. A well-thought-out business case is also a strong tool when gathering buy-in from leadership. All too often, however, the decision to implement CRM is not supported by a thorough business case. Instead, it is a foregone conclusion based on anecdotal information and the thrill of finding a technology tool that seems like it will solve all customer relationship management problems.

The CRM Business Case Template is a series of tables and examples that will guide users through consideration of the key factors that should inform the decision to implement CRM—or not.

## Anatomy of a Business Case

The diagram below depicts the components of a business case that captures the information needed to decide whether to implement a CRM system or not.



**Implementation Note**: contacts report that insight into business drivers is compelling information to executives, who attach to the bottom-line perspective the business drivers section provides. On the other hand, end-users resonate with the projected benefits section of the business case as it allows them an opportunity to vent about current processes and gives them a preview of the improved future state. While the business case should be used holistically to determine whether CRM is a good solution for a unit, pieces of it can and should be leveraged when engaging with specific audiences.

## Developing a Business Case

Fill out the following tables to collect the information needed to develop a sound CRM business case. In each table, the first consideration has been filled in with a hypothetical, example response. Each table also includes customizable cells for considerations that are not already listed.

### 1. What are the Business Drivers?

| Consideration | Inputs that would impact the driver |
|---|---|
| Increased revenues from optimized enrollments | • Increased conversion rate due to better communication plans, self-service features, improved website<br>• Decreased time to conversion due to better and faster communications with prospects and more efficient delivery of needed information<br>• More conversions due to greater volume of prospects at the top of the funnel (and carrying down it) as a result of improved and greater numbers of inquiry forms |
| Decreased costs from more efficient marketing and recruiting operations | |
| Custom: | |

## 2. What are the Projected Benefits?

| Consideration | Current pain points | Post-CRM objectives | Potential barriers to accomplishing post-CRM objectives |
|---|---|---|---|
| Inquiry/lead management | • Tracking inquiries and leads is entirely manual right now, which means it's time consuming and prone to mistakes.<br>• Different systems used by each enrollment counselor make knowledge management difficult, especially when a counselor leaves. | A highly automated management process that collects and organizes standardized information and manages the communication flow | • Staff resistance to giving up shadow systems which are inefficient but comfortable<br>• Inability to complete thorough business process review needed to develop automated workflows and best practices |
| Workflow management | | | |
| Lifecycle management | | | |
| Contact management | | | |
| Web-based self-service | | | |
| Campaign automation | | | |
| Analytics | | | |
| Scalability | | | |
| Customer service | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |

## 3. What are the Associated Costs?

| Consideration | Estimated cost (per unit time, if applicable) |
|---|---|
| Hardware and software licenses | ~ $30,000-50,000 |
| Anticipated cost and frequency of upgrades | |
| Service gap during implementation downtime | |
| Installation service costs | |
| Implementation service and staffing costs | |
| Staff training | |
| Change management | |
| Ongoing maintenance costs/user help desk support costs | |
| Costs on top of your existing enterprise IT infrastructure | |
| Custom: | |
| Custom: | |
| Custom: | |
| Total estimated cost: | |

# Tool #19: CRM Business Case Template (cont.)

## 4. What are the Potential Risks?

| Consideration | Risk drivers | Ways of avoiding risk |
|---|---|---|
| Behind schedule and over-budget implementation | - Too many (planning and execution) cooks in the kitchen<br>- Too few (planning and execution) cooks in the kitchen<br>- Staff resistance to adoption<br>- Lack of leadership support throughout the process | - Identifying staff representation needed at each stage of the road to CRM<br>- Incorporating end-user input early<br>- Outlining a projected timeline and budget early on to set expectations<br>- Issuing regular email updates to end-users on the implementation so that it doesn't get bogged down by staff pushback to being left in the dark<br>- Issuing regular email updates to leadership specifically that outline progress and explicit ways in which leaders can continue to provide support |
| Poor end-user adoption | | |
| Disrupted business processes | | |
| Compromised "customer service" | | |
| Poor integration with other systems | | |
| Lack of tangible results | | |
| Isolated implementation | | |
| Custom: | | |
| Custom: | | |
| Custom: | | |
| Custom: | | |

## Additional Resources for Making the Case for CRM

Contacts reported using the following resources to make the business case for CRM to campus constituents.

http://www.slideshare.net/stetsonhatter/customer-relationship-management-crm-theory-and-practice

http://www.slideshare.net/Intelliworks/datamonitor-intelliworks-crm-in-he-cytc8580-0708

http://www.slideshare.net/Intelliworks/is-your-crm-performing-like-a-rock-star-or-an-amateur

http://www.slideshare.net/Intelliworks/taking-off-with-intelliworks

http://www.slideshare.net/trobin/prospect-management-and-the-crm-advantage

# Tool #20: Stakeholder Process Improvement Forms

Staff left out of the CRM decision and planning processes are more likely to be disengaged with or even resistant to adoption, which can be crippling to any unit's CRM implementation. This tool highlights resources for garnering staff input, for fostering buy-in during planning and implementation, and for efficiently stewarding training resources (after assessing which staff are resistant to process or technology change).

## Tool Table of Contents

## Roadmap for Involving Staff

The timeline below shows basic implementation phases to the left of the arrow and corresponding staff management steps to the right. The □ directs readers to resources within this tool and within the larger toolkit. The right-most column outlines staff roles explained in Tool 32: CRM Leadership Structure Guide.

| **Implementation Phases** | **Staff Management Steps** | **Description and Toolkit Resources** | **Staff Involvement*** |
|---|---|---|---|
| | Identify CRM Leaders and Stakeholders | Identify CRM leadership team and organize staff into user groups according to job function<br>✓ *Planning Worksheet 1 in this Tool, p. 3* | • CRM Program Lead<br>• IT Representative<br>• Business Analyst |
| Review Business Processes | | Understand the gaps between units current state and end-vision state<br>✓ *Tool 21: Guide to Understanding Your CRM Needs* | • Steering Committee |
| Plan Timeline for Implementation | | Anticipate implementation milemarkers and hurdles<br>✓ *Tool 28: CRM Risk Point Map*<br>✓ *Tool 22: Example CRM Implementation Timeline* | • Implementation Team |
| | Collect Staff Input | Collect recommendations for process improvement in these areas: communication, technology, and organization.<br>✓ *User Group Activity 1 in this Tool, p. 4* | • CRM Program Lead (if possible)<br>• Departmental Champions/Subject Matter Experts |

* See Tool 31: CRM Leadership Structure Guide for an explanation of responsibilities and qualifications of the roles described here.

# Tool #20: Stakeholder Process Improvement Forms (cont.)

| | | |
|---|---|---|
| Craft CRM Goals and Roadmap | Plan for CRM adoption<br>✓ *Tool 27: CRM Resource Intensity Comparison Chart*<br>✓ *Tool 37: CRM KPI Builder*<br>✓ *Tool 25: Vendor Selection Scorecard* | • Steering Committee |
| Select a Vendor | ✓ *Tool 25: Vendor Selection Scorecard*<br>✓ *Tool 26: Vendor Selection Committee Guidelines* (for selection committee members who are seeking input from their teams) | • CRM Vendor Selection Committee |
| Announce CRM; Collect Staff Input about Goals | Announce decision to adopt CRM, showing staff contribution; announce vendor selection (if applicable); collect and incorporate staff input about goals.<br>✓ *User Group Activity 2 in this Tool, p. 5*<br>✓ *User Group Activity 3 in this Tool, p. 6* | • Program Lead<br>• Departmental Champions<br>• Steering Committee |
| Design, Test System | Determine implementation timeline<br>✓ *Tool 22: Example CRM Implementation Timeline* | • Steering Committee |
| Identify Reticent Staff | Identify resistant staff and accommodate them with specialized training<br>✓ *Planning Worksheets 2 in this Tool, p. 3* | • Department Champions |
| Initiate Training | Survey staff about training preferences and deliver training<br>✓ *User Group Activity 4 in this Tool, p. 7*<br>✓ *Tool 33: CRM Training Curriculum Outline* | • Department Champions<br>• User Trainers |
| **"Go Live"** | | |

* See Tool 31: CRM Leadership Structure Guide for an explanation of responsibilities and qualifications of the roles described here.

## Staff Management Resources for Leaders

Use the worksheets in this section to plan user group activities and special training for staff resistant to change.

### Planning Worksheet 1. Assigning Staff to User Groups

Directions: Select the functional areas that should be represented in each user group. Consider these job functions: marketing/recruitment staff, admissions staff, IT staff, academic and retention advisors, and faculty members, and program directors.

| User Group Name | Departments Represented | Staff Names |
|---|---|---|
| *Example: Pre-enrollment Users* | *Marketing specialists, recruitment advisors and/or admissions counselors* | *John Mustard, Sylvia Peacock, Richard Green, Mildred White* |
| | | |
| | | |
| | | |

### Planning Worksheet 2. Training Development for Resistant Staff

Directions: Use the table below to outline special training for reticent staff. Consider the following when designing training:

**Content**

- Exercises that build empathy between the staff member and the student (e.g., role play)
- Practice time with new technology in a sandbox
- Case studies that illustrate how process and technology changes will improve staff's productivity and increase quality of work
    - http://emaspro.com/wp-content/uploads/2011/11/SNHU-Case-Study_v1_01-07-11.pdf
    - http://www.jisc.ac.uk/media/documents/programmes/bce/teeside_casestudy.pdf

**Delivery**

- Contacts recommend an informational tone with little to no discussion of punitive repercussions
- One-on-one conversations allows for better professional development
- Consider pros and cons of trainers: peer, supervisors, non-departmental personnel

| | |
|---|---|
| Staff name | |
| Content | Activities that meet guidelines above: |
| Delivery | Intended tone, format, trainer: |
| Frequency | |
| "Mission Accomplished" Indicator | |

## Staff Buy-In Activities

### User Group Activity 1: Staff Input on Process Improvement

“Suggestions Box” Worksheet: User Group Meeting, mm/dd/yy

As we plan for the future, Example University’s COE unit is in the process of evaluating its communication with prospective and current students, including staff-student interaction. We would like to hear your suggestions about how we can change the unit’s communication processes and technology to help you do your job better. We know that you work hard to serve prospective and current students; by putting in place right tools and system improvements, we hope to help you and, in turn, improve communication with students. Please complete this worksheet and return it to your supervisor by mm/dd/yy.

1. **Please list the core functions of your job:**
    - *Example for triage desk staff: To answer prospective students’ questions about the application process*
    - ________________________________________________________________________
    - ________________________________________________________________________
    - ________________________________________________________________________
2. **Please describe inefficiencies or technological limitations that prevent you from doing the best job possible in the core functions listed above:**
    - *Example for recruitment counselor: I call prospective students to see if they need help applying. I have to scroll through a long spreadsheet to determine their program of interest and 50 percent of the time no program of interest is listed, so I’m working with very little information when reaching out.*
    - ________________________________________________________________________
    - ________________________________________________________________________
    - ________________________________________________________________________
3. **When, how, and why do you communicate do you have with prospective or current students?**
    - *Example for program director: I meet prospective students at corporate events and conferences (about 20 per year) and promoting our online programs for professionals*
    - ________________________________________________________________________
    - ________________________________________________________________________
    - ________________________________________________________________________
4. **What do you think are the prospective and current students’ main concerns or complaints about their interaction with staff in your role?**
    - *Example for program director: If a prospective student expresses interest, I pass along the student’s name and contact information to the recruitment team but I am never looped in about whether the student applies or enrolls. I would enjoy learning about the outcome of the prospective student interest I generate.*
    - ________________________________________________________________________
    - ________________________________________________________________________
    - ________________________________________________________________________
5. **Please list any other suggestions for improved communication processes or organization.**

    ________________________________________________________________________

    ________________________________________________________________________

# Tool #20: Stakeholder Process Improvement Forms (cont.)

## User Group Activity 2: Email Acknowledging Suggestions

This email template offers a model for acknowledging staff suggestions and mapping them to planned improvements.

From: CRM Leaders
To: All COE Unit Staff
Subject: Thank you for the suggestions!  We've built an improvement plan around them.

Dear colleagues,

Thank you for completing the "Suggestion Box" Worksheet at your last user group meeting.  Based on your input, Dean Humboldt has directed a team of [insert department names e.g., marketing and IT)] representatives to plan and lead a series of communication and business process improvements based on customer relationships management (CRM) philosophy.  Under this philosophy, we will develop smarter processes for communicating with prospective students so that our unit better retains the attention of prospective students, better answers their questions and concerns based on their needs, and ultimately improves conversion from prospect to applicant to enrolled student.

To accomplish these improvements, we've decided to partner with a technology vendor, [insert vendor name], and an implementation consultant, [insert consultant name].  Both partners have excellent track records and have worked with our peers like [insert peer university names].  We are at the beginning of designing these process improvements with the help of our vendor partners, but we wanted to give you some examples of how your suggestions have informed our first-draft efforts.

| **Staff's Suggestion** (*From User Group Activity 1*) → | **Process Improvement Planned** → | **Vendor Improvements** |
|---|---|---|
| 1. If a prospective student expresses interest, I pass along the student's name and contact information to the recruitment team but I am never looped in about whether the student applies or enrolls. I would enjoy learning about the outcome of the prospective student interest I generate at conferences. | Marketing staff will generate reports based on lead source and will send reports about conference-generated leads (across unit and across each program individually) to program directors.  Program directors and their peers will see the fruits of good conference recruitment. | Vendor technology will allow both program director staff and recruitment staff to access prospective student records. |
| 2. I call prospective students to see if they need help applying. I have to scroll through a long spreadsheet to determine their program of interest and usually no program of interest is listed; I'm working with scarce information when reaching out. | Changes to inquiry form will collect more robust prospective student information | Consultant will devise the best way to collect broad discipline of interest even from the undecided prospects.  How can this question be incorporated into an initial or later inquiry form? |

Thank you again for you again for your suggestions.  We will keep you updated as we finalize our first draft of goals for CRM implementation. Stay tuned for information about your next user group session and training and resources that will help staff take advantage of CRM tools and techniques.

All the best,

Julie Furtado (marketing), Karishma Ackerman (admission), Brian Helinek (IT)
CRM Leaders Team

# Tool #20: Stakeholder Process Improvement Forms (cont.)

## User Group Activity 3: Codifying Staff Contributions to CRM Goals

Your Contributions to CRM: User Group Meeting, mm/dd/yy

In this session, the meeting facilitators will review your input from the first user group session and will outline our goals for customer relationship management (CRM) philosophy-informed goals. In the middle column, explain how you can contribute to the unit's proposed goals for improved communication. In the right column, modify or make additions to the goals stated in the left-most column.

| | **How You Can Contribute** | **Goal Additions/Modifications** |
|---|---|---|
| Revenue Goals | | |
| *Example goal inserted by CRM leaders:* *reduce cost per lead* | *Sample comment from hypothetical recruitment advisor:* *I can convert more of our pay-per-click advertising leads to applicants by better tailoring phone or email outreach to prospective students' goals/motivations.* | *Sample suggested additions:* *Improve percentage of pay-per-click leads reached by phone. Improve conversion rates after initial phone conversation.* |
| | | |
| | | |
| | | |
| | | |
| Marketing and Operational Excellence | | |
| *Example goal inserted by CRM leaders:* *increase email open rates* | *Sample comment from hypothetical information technology specialist:* *I can work with the marketing staff to develop an A/B test for subject lines.* | *Sample suggested additions:* *Complete at least one A/B test on subject lines per month.* |
| *Example goal inserted by CRM leaders:* *increase number of repeat students* | *Sample comment from hypothetical marketing director:* *My staff and I can develop alumni-oriented email campaigns that encourage alumni to re-engage with the unit.* | *Sample suggested additions:* *Develop at least six new pieces of alumni-oriented email content for pilot campaign. Set goal for open rate and track improvement with each new campaign.* |
| | | |
| | | |
| | | |
| Goal Category: ________________________ | | |
| | | . |
| | | |
| | | |
| | | |
| | | |

# Tool #20: Stakeholder Process Improvement Forms (cont.)

## User Group Activity 4: Staff Survey about Training Preferences

What Type of Training is Best for You?

Directions: As part of the road to CRM implementation, we'll be offering a series of trainings. Please check *only one box* that corresponds to your *most-preferred* option for each category.

### Training Format

- ☐ In-person discussion with take-home computer assignments
- ☐ In-person discussion with computer demonstration in computer lab
- ☐ Self-paced, online module with comprehension quiz and with comments submission via e-mail

### Training Audience

- ☐ Mostly unit-wide trainings
- ☐ Mostly department-wide trainings
- ☐ Mostly trainings based on small, job function groups

### Training Schedule

- ☐ Intensive format (e.g., over 2-day, in-office retreat)
- ☐ Once per week over 6-8 weeks
- ☐ Twice per week over roughly one month

### Resources for Additional Training

- ☐ One-on-one sessions with your department's "super user"
- ☐ One-on-one sessions with your supervisor
- ☐ Shadow days, following a peer with above-average speed of adoption

# Tool #21: Guide to Understanding Your CRM Needs

## Understanding your CRM Needs

Many organizations buy a CRM solution without first considering what business issues they really want to address. However, the premature and poorly planned implementations severely undercut likelihood of success. Industry analysts like Gartner, Forrester and Butler suggest that 50% to 70% of CRM projects do not deliver a return on investment or fail altogether for such reasons.

By highlighting the key issues you want to solve within your business, you will be better informed to choose a CRM solution that is capable of meeting these needs effectively. Additionally, a system that has been implemented based on its ability to solve business issues is one that will drive success throughout the organization, will be adopted well by your staff, and is therefore most likely to generate a return on your investment.

Use the table below, informed in part by the Extended Campus at Oregon State University's CRM needs assessment, to prioritize your team's CRM-related needs.

**Implementation Note:** This tool should be used before the process of selecting a vendor begins.  It is best applied when brainstorming customer relationship management trouble spots and goals. The magnitude of those needs (i.e., the gap between current and envisioned processes) should inform the decision to pursue a CRM system as well as the determination of who will be using the CRM ( a question that not only influences cost, via the number of licenses needed, but the desired capabilities and outcomes as well).  The tool can also support change management by fostering consensus among various constituents.

| Desired Capability or Outcome | Priority Level |
|---|---|
| **Sales Force Automation** | |
| We need a central repository to hold all our prospective student data and interactions across the organization so everyone is on the same page. | H M L |
| We need a better way to assign, track and prioritize leads so our recruiting team does not miss any 'hot' leads. | H M L |
| We need better visibility into our pipeline and forecasts so we can plan better. | H M L |
| We need our recruiting team to spend less time on administrative tasks, like creating management reports. | H M L |
| We need to be able to identify the status and history of leads and opportunities at the click of a mouse. | H M L |
| We need a more effective way to share knowledge and information so we can learn and improve our processes. | H M L |
| We want to be able to create, easily access, and use a selection of email templates to save us time when replying to common questions or follow-up activities. | H M L |
| We want to know which of our recruiting staff people is under/over performing so we can provide extra coaching or learn from best practice. | H M L |

# Tool #21: Guide to Understanding Your CRM Needs (cont.)

| | |
|---|---|
| We need to track customer contracts and manage renewals so we don't miss any contract education renewal opportunities. | H M L |

| **Marketing Automation** | |
|---|---|
| We want better visibility into the sources that generate the highest quality leads, so we can alter our budget spend accordingly. | H M L |
| We want a way of calculating accurate marketing campaign ROI and the success (or lack thereof) of marketing campaigns. | H M L |
| We want to be able to capture leads directly from our website and follow up on these in a more effective way. | H M L |
| We want to streamline our communications with prospects by using automatic communications plans. | H M L |
| We need a better way to segment and filter our data, so we can generate more targeted marketing campaigns. | H M L |
| We need to de-duplicate data collected from different sources in order to make data analysis and marketing campaign development easier. | H M L |
| We need greater visibility into the outcome of leads after we pass them on to our colleagues in other departments. | H M L |
| We advertise using Google Adwords and want to know which key words and pay-per-click campaigns are the most successful at generating conversions. | H M L |
| We have a lot of data collected through various channels and want to easily import and store all this data in one central system. | H M L |

| **Communications with Prospects** | |
|---|---|
| We need a better way of assigning, tracking and prioritizing cases for more effective follow-up. | H M L |
| We want to establish a greater understanding of what issues our customers are having most frequently so we can get to the root of the problem, whether this be more training, improved processes etc. | H M L |
| We need our recruiting team to have visibility of any issues their customers are having so they can respond more appropriately. | H M L |
| We need a more effective way of reporting on the problems our customers have in order to help us improve our business processes. | H M L |
| We want the ability to monitor how our support teams are performing so we can improve our handling of cases and learn from best practices. | H M L |
| We have a 'Help' section on our website and want our customers to be able to raise cases directly from our website so it's easier for them to report issues. | H M L |
| Our business is a services organization; we want to be able to track how efficiently we engage with our prospects. | H M L |

# Tool #21: Guide to Understanding Your CRM Needs (cont.)

| | |
|---|---|
| We want to be able to see a particular customer's order history and to track and report on the progress of orders, helping to give us better insight into our customers purchasing behavior. | H M L |
| We have various 'groups' of staff, and for security reasons only want specific groups and people to be able to access certain student and/or prospect data. | H M L |
| **Events** | |
| We want to be able to better advertise, register participants, and organize online and in-person events | H M L |
| **Vendors** | |
| We do not have the skills in house to install and effectively manage a CRM system. We want to ensure our data is secure but at the same time provides guaranteed Service Levels for the availability of the application. | H M L |
| We want a vendor that has experience within the Higher Education industry, and will happily show me other customers of a similar size and with similar requirements to mine, who are successfully using the application. | H M L |
| We want a solution where all the upgrades and telephone support we need is included within the cost. | H M L |
| We may require occasional consulting or 'refresher' training. If we need extra help, we want a way of accessing this on a 'pay as you go' basis. | H M L |
| We want an annual subscription to a solution where there is an incentive to ensure that we're successful on an on-going basis. | H M L |
| **Platform Features** | |
| We want to be able to access our CRM wherever we are via a universal, web-based interface that works in any modern browser as opposed to one that is unique to the computer(s) on which it is installed. | H M L |
| Our department does not control enterprise computing installations on campus, so we want the CRM vendor to be responsible for the software releases/versioning and patches as needed via a Software-as-a-Service (SaaS) delivery option. | H M L |
| We need a solution that has proven to integrate well with our SIS | H M L |
| We want a solution that integrates with chat or social media services like Facebook | H M L |

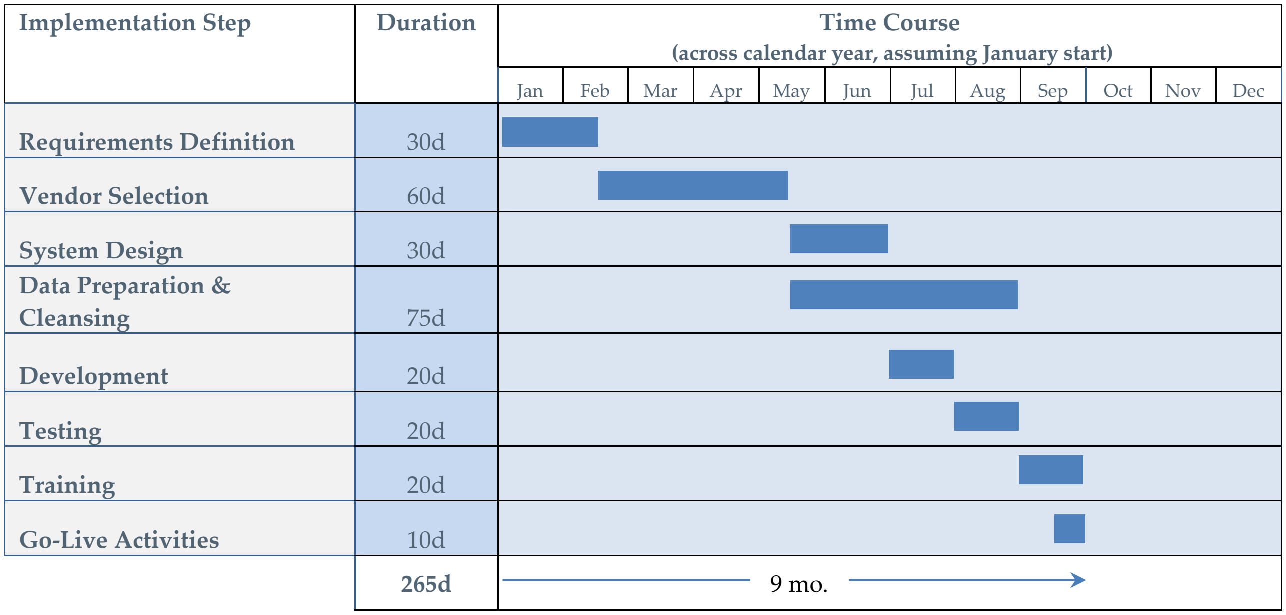
# Tool #21: Guide to Understanding Your CRM Needs (cont.)

**Notes**

# Tool #22: Example CRM Implementation Timeline

“How long will it take to implement a CRM system?” is one of the basic questions that implementers struggle to answer. Without an answer, they launch an implementation that slowly comes together—bypassing the efficiencies of parallel processing and losing valuable momentum. The end result is often an implementation that is behind schedule, over budget, and stagnant. Staff are also often not invested, undercutting future utilization. Without a realistic project outline, an otherwise successful CRM implementation can be labeled a failure because it does not deliver against unachievable expectations.

The Example CRM Implementation Timeline outlines a project plan and corresponding timeline. The estimates below are for a moderate 20-50 user implementation of a standard, mid-market CRM application. Processes and times to completion should be essentially the same regardless of whether the implementation is an “in the cloud” or “on-premise” deployment.



| Implementation Step | Duration |
|---|---|
| Requirements Definition | 30d |
| Vendor Selection | 60d |
| System Design | 30d |
| Data Preparation & Cleansing | 75d |
| Development | 20d |
| Testing | 20d |
| Training | 20d |
| Go-Live Activities | 10d |
| | **265d** |

## Top Lessons Learned About CRM Implementation

**Don’t Forget About the Front-End Preparation**. The plan above does not include the preliminary feasibility and planning activities that inform the decision to move forward with CRM. The time elapsed while considering whether to undertake a CRM project can dwarf the time it takes to execute once the decision is made.  See Tool #19: CRM Business Case Template for decision guidelines for pursuing CRM.

**Note the Importance of Back-End On-Boarding.** The plan also suggests that the project finishes once the live phase is complete. The reality is that there is normally an intensive period of “on-boarding” with new users until the desired usage patterns are established. The plan also assumes all users will go live together, which in practice may not be the case, and on-boarding will need to occur as each group goes live.

**Rushing Early On Will Hurt Later.** In the above plan, estimated development time is less than the time dedicated to other activities, which reflects the flexibility of the current generation of mid-market CRM packages. However, if the requirements-gathering and design phases are not comprehensively and competently completed, the development phase will likely grow significantly.

**Remain Flexible as Needed to Account for the Unexpected.** While there is a measure of contingency built into the plan above, it still depicts a fairly aggressive timeline, and it doesn’t factor in some of the day-to-day business realities that can disrupt projects, such as key staff being unavailable.  Additionally, other business priorities can put a project onto the back burner. Absolute fidelity to the timeline above should not be a goal so much as the timeline should set general expectations and trigger planning accordingly.

# Tool #22: Example CRM Implementation Timeline (cont.)

**Finally, a Few Reasons Why this Timeline May Vary.** Contacts remark that vendors do not always accurately define or communicate how long a CRM project will take to plan and launch. Be it due to a desire to finalize a sale or an underestimate of the magnitude of the implementation, vendors tend to lowball time estimates.

Additionally, varying definitions of what “implementation” includes also contribute to discrepancies in timeline estimates. Quotes of a 12-week roll-out, for example, are almost certainly not referring to a process beginning with initial planning and feasibility studies and ending with satisfactory levels of user adoption. Instead, the estimator probably is including only the phases from development to first-users-going-live. As the timeline above displays, the phases you take into account affect quoted duration of a CRM implementation.

# Tool #23: RFP Creation Template

Many CRM champions are forced into the unfamiliar territory of writing an RFP due to institutional procurement policies. A well-crafted RFP can save staff time otherwise spent watching parades of vendor demos that don't meet university needs by helping the right vendor find you. The Request for Proposal (RFP) template and sample RFP list is designed to help you draft the RFP that will attract vendors who can come closest to your technical, support, and cost ideals. Review the template first, with descriptions of each part of the RFP, then visit the seven CRM RFP samples hyperlinked at the end of this document. The template and the sample RFPs are intended to give you an overview of the many ways to structure your RFP and the content that you want to include; the template is not exhaustive and may not have items that your particular unit will need to include.

## Typical CRM RFP Structure[4]

| | |
|---|---|
| **1. Institutional Information** | **1.1 University/Unit overview**: provide a description of your organization including student and staff sizes, locations, number of system users, current CRM capabilities and systems, stakeholders, system expansion plans, and business goals you are looking to achieve.<br>**1.2. Technology environment:** Provide a detailed description of your technology environment including a combination of the following: LAN diagram, telephony systems, server operating system, student information system, desktop operating system, programming languages, web architecture, applications, etc. |
| **2. Statement of Work** | **2.1 Purpose:** The purpose of this Request for Proposal (RFP) process is to invite vendors to submit their proposal to provide a Customer/Student Relationship Management (CRM) system outlining product functionality and corresponding cost. This document contains the business and system requirements necessary for a successful CRM system implementation for any organization.<br>**2.2 Scope:** Provide a description of each department that will be using the CRM system. Additionally, document what is in scope for this project and explicitly state what is not in scope. If you are planning on a phased approach, provide a summary of what each phase will look like from your perspective.<br>**2.3 Project Schedule:** Subject to change:<br>RFP Delivered to Vendors: mm/dd/yy<br>Technical Question Period Ends: mm/dd/yy<br>RFP Close Date: mm/dd/yy<br>Conduct Vendor Evaluations: mm/dd/yy<br>Award Contract to Vendor: mm/dd/yy |
| **3. Proposal Submission Procedure** | **3.1 Vendor RFP Response:** By responding to this RFP, the vendor agrees to be responsible for fully understanding the requirements and details of the RFP and will ask any questions to ensure such understanding is gained. [Insert your institution's name] retains the right to disqualify vendors who do not demonstrate a clear understanding of our needs. Furthermore, the right to disqualify a vendor extends past the contract award period and [Insert your institution's name here] will be at no fault, cost, or liability. |

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[4] Adapted from Demand Metric's "CRM System RFP Template," available here: http://www.docstoc.com/docs/11760060/CRM-System-RFP-Template.

# Tool #23: RFP Creation Template (cont.)

| | |
|---|---|
| **3. Proposal Submission Procedure** | **3.2 Good Faith Statement:** All information provided by [insert your institution's name] is offered in good faith. Specific items are subject to change at any time based on business and organizational circumstances. [Insert your institution's name] retains the right to disqualify vendors who do not demonstrate a clear understanding of our needs. Furthermore, the right to disqualify a vendor extends past the contract award period and [insert your institution's name] will be at no fault, cost, or liability.<br>**3.3 Communication and Proposal Submission Guidelines:** Communications shall not be effective unless a specified procurement executive who is responsible for managing the RFP process formally confirms these communications in writing. In no case shall verbal communication govern over written communications.<br>Please submit your proposal by [insert RFP close date].<br>Please send questions related to this RFP and vendor proposals to:<br>[Insert your institution name]<br>[Insert department name]<br>[Insert mailing address]<br>Attention:<br>[Insert contact name and title]<br>[insert phone/email/fax contact information]<br>**3.4 Evaluation Criteria**<br>All proposals will be evaluated systematically, based on the following key criteria. The purpose of this section is to identify suppliers with the interest, capabilities, and financial stability to supply a CRM system, as defined in the Scope of Work.<br>Following is a prioritized list of our key evaluation criteria:<br>1. [Insert Criterion]<br>2. [Insert Criterion]<br>3. [Insert Criterion]<br>4. [Insert Criterion]<br>5. [Insert Criterion]<br>**3.5 Short-list Selection:** Vendors who have demonstrated their capacity to meet our needs will be contacted via phone and/or mail to be notified of their selection to move forward in the RFP process. Vendors who have not been selected will not be contacted. |
| **4. Scope of Work and Business Requirements** | This section will provide a categorized list of business and system requirements, with an associated description for each requirement. These requirements will provide the foundation for vendor presentations, discussions, and negotiations.<br>**4.1 General Features and Requirements**<br>1. Secure Web Access—the CRM system can be accessed remotely by users.<br>2. Shared Calendars—calendars can be viewed based on role and permissions.<br>3. Activity Planning and Tracking—tasks can be assigned and tracked on an individual basis and/or generated automatically based on business rules.<br>4. Microsoft Office Integration—ability to integrate with Outlook, Exchange, Word, and Excel, including ability to import/export Excel and CSV files.<br>5. Accounting System Integration—ability to integrate with QuickBooks<br>6. Workflow Automation—ability to integrate and automate business processes<br>7. Customization of Reports—flexible and intuitive report generation |

# Tool #23: RFP Creation Template (cont.)

**4. Scope of Work and Business Requirements**

**4.2 Technical Features and Requirements**

1. User and Group Security Settings—role–based security and permissions
2. PDA Integration—online/offline access and integration with wireless devices such as blackberries; ability to synchronize data remotely; call handling; dispatching, and scheduling
3. Microsoft System Integration—supports Windows 7 operating system, Microsoft IIS, Microsoft SQL DB
4. Customization Capabilities—flexible administration and customization
5. Integration with Third Party Application—provides interface of API to integrate other third party applications such as quote generators
6. Supports XML—internal/external data is exchanged using XML industry standards, not a proprietary language

**4.3 Contact Management Features and Requirements**

1. Account history and Tracking—simple, user-friendly interface to add account information such as contacts, phone, address, email, fax, website, preferences, “do not contact” or other account related details
2. Call/Email History and Tracking—ability to record phone calls and emails
3. Customizable User interface—ability to customize views and interfaces
4. Mail Merge – the CRM system can leverage marketing databases to insert contact information into documents such as letters or mailing labels
5. Customizable Objects and Fields—ability to create custom fields/objects
6. Advanced Search—ability to search contacts, notes, email/call history
7. List Building and Management—ability to create lists of contacts, tasks, etc.
8. Contact Hierarchy Management—ability to generate organizational charts
9. Time/Date Stamped Notes—automatic time/date stamping for all notes

**4.4 Student Service and Support Features and Requirements**

1. Case/Ticket Management—system provides a ticketing system for the creation, assignment, and resolution of student support issues.
2. Case Routing and Escalation Management—system provides customizable escalation management features to ensure high-severity student tickets are resolved quickly
3. Billable Time-Tracking—ability to monitor and track time spent on cases
4. Student Service Reports—ability to generate reports such as open cases, total cases created, closed cases, total cases created by agent, etc.
5. Student Service Dashboard—key metrics visualized with dashboard
6. Student web access to cases—ability for student to track case online
8. Student Self-Service Portal—system provides online self-service portal where students can login and access information, update account details, make payments, view order and shipping status, download support documents, etc.
9. Best practices knowledge base—students and support agents have online access to best practices with self-help documents and how-to guides

# Tool #23: RFP Creation Template (cont.)

| | |
|---|---|
| **4. Scope of Work and Business Requirements** | **4.5 Marketing Features and Requirements**<br>1. Campaign Management—the CRM system provides tools designed to track the return on investment for multi-channel campaigns. Campaign management features provide a simple interface for building, monitoring, and adjusting campaigns<br>2. HTML Email Marketing—system can send tracked HTML emails<br>3. Customizable Campaign Fields—the system is customizable and allows for an unlimited amount of campaign types to be entered and tracked. Specific fields for each campaign type can be created, modified, or removed.<br>4. Compliance with CAN-SPAM—system ensures adherence to CAN-SPAM<br>5. Student Segmentation and Profiling—the CRM system can segment students and prospects by demographic criterion<br>6. Student Survey Tools—the system can capture online/offline student survey data, or can easily be integrated into an existing survey system<br>7. Marketing Collateral Management—staff can easily retrieve all marketing collateral. There is no limit on the amount of document storage.<br>8. Campaign Response Metrics—all student/prospect responses from campaigns, such as click-through rates, can be reported on<br>9. Campaign ROI Measurement—all campaign-related expenses and revenues can be entered and reported on for campaign ROI analysis<br>10. Budget and Expense Monitoring—system tracks campaign budget/expenses<br><br>**4.6 Sales Features and Requirements**<br>1. Sales Process Methodology—integration with sales process methodologies<br>2. Web lead capture—ability to integrate forms to capture/assign web leads<br>3. Territory management—system can automatically assign leads and accounts based on user-defined territory criteria such as geographic region, company, size, etc.<br>4. Contact Center Features—ability to record calls; provide call statistics and metrics, auto dial, integrate with current IP/PBX phone system.<br>5. Integration with Prospecting Tools—ability to integrate with lead generation prospecting tools and applications<br>6. Lead Management—system supports lead scoring, nurturing, assignment, re-assignment, qualification, activity reporting, prospect list building<br>7. Opportunity Management—system provides reporting on sales opportunity pipeline, can be customized to fit our sales stages and cycle. Provides weighted forecasting based on opportunity stages, win/loss reports, and identifies stalled opportunities<br>8. Sales Reports and Dashboard—provides high-level view of key performance indicators based on sales reports that can be rolled up or drilled down on.<br>9. Partner Relationship Management—ability to view partner sales funnels<br>10. Student Lifecycle Task Manager—tasks generated based on lifecycle |
| **5. Vendor Information** | Vendors must submit the following information to be considered:<br>1. Corporate Overview—legal name, year of incorporation, number of employees, income statement if available<br>2. Products and services—description of all products and services supplied<br>3. Markets served—description of geographic/industry markets served<br>4. Partners—list of technology partners and implementation partners (in regional area), and roles in the product's ecosystem |
| **6. Estimated Budget and Resources Required** | All vendors must provide a breakdown of costs related to the implementation of their CRM system. Costs include, but are not limited to, hardware, software licensing, middle-ware, training, consulting services, integrations, data migration, documentation, etc. Vendor must agree to keep the quoted pricing in their proposals for a minimum of 90 days after proposal submission. Additionally vendors must provide options for deployment models, such as hosted, client server, or other model. Finally, all proposals must include a project schedule and work plan, which identifies timelines, key milestones, project phases, or other project information. |

## Publicly Available Sample CRM RFPs

1. Binghamton University, State University of New York
   http://www2.binghamton.edu/purchasing/crmrfpspeconly.pdf
2. Bowling Green State University
   http://www.bgsu.edu/downloads/finance/file67374.pdf
3. Minnesota State Colleges and Universities (MnSCU)
   http://www.academicaffairs.mnscu.edu/studentaffairs/documents/StudentMarketingCRMRFP2.pdf
4. Oregon State University
   https://secure.ous.edu/bid/system/attachments/262/original/WY157758P%20CRM%20System%20RFP.pdf?1326409048
5. Southern Utah University
   http://www.suu.edu/ad/purchasing/pdf/StudentRelationshipManagement.pdf
6. University of Maryland University College
   http://www.umuc.edu/visitors/corporate/upload/RFP-90979.pdf
7. University of Oregon
   https://secure.ous.edu/bapp/bopps/view/2928

# Tool #24: Higher Education CRM Vendor Primer

Because a multitude of factors contribute to an administrator's evaluation of vendors, COE executives are often searching for a starting point in assessing vendor strengths. This tool offers a baseline of vendor information including typical pricing models for CRM providers and a list of vendors that the COE Forum encountered during the research on the topic. Please note that it is not exhaustive and cannot substitute the process of scoring vendors based on the unique needs of the unit. See Tool #25: Vendor Selection Scorecard for more information on this topic. Next to each vendor is a link to its website, a list of its clients in higher education, and a basic description of their pricing model.

### Typical CRM Pricing Formula

**Implementation Fee** } Up front, one-time cost

**Maintenance Fee**
\+ **License Fee** } Recurring costs (either monthly or annual)

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**Total Cost** } Varies widely (from <$5k to >$100k) depending on:

- Scope of the implementation (how many units/programs will be using the new system)
- Complexity of data integration with other systems on campus
- Level of customer service (some vendors offer various levels of service including onsite consulting)
- Number of users with access to the system

### Vendor Comparisons Based on COE Forum Research[5]

| Vendor | Key Notes | |
|---|---|---|
| blackbaud | Reported Strengths | Fundraising, alumni relations |
| | Pricing Structure | • User license For their Raiser's Edge product (a back-end CRM), customers pay a (typically around $10k-$12k/year/user,<br>• Institutions then have the option of adding on functionality modules that can range in cost from $10k to over $100k |
| | Customers | McNeese State University Office of Alumni Relations, U.S. Naval Academy Office of Alumni Relations, UT Dallas Alumni |
| | Website /Phone | https://www.blackbaud.com/education/#tileContent1 |

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1. All information in this table is available either on the website of the vendor or was derived from The Advisory Board Company interviews and analysis.

# Tool #24: Higher Education CRM Vendor Primer (cont.)

| Vendor | Key Notes | |
|---|---|---|
| CampusCE | Reported Strengths | • Corporate education, payment platform integration, registration outside of semester-bound timelines |
| | Price/Pricing Structure | • Upfront cost:Initial License/Implemnation Fee: <$10k->$100k<br>• Maintenance cost: <$6,000 - $60k<br>• Pricing is different for the credit side requiring an individual consultation. |
| | Customers | Bellvue College Continuing Education, Kennesaw State University, Illinois Central College Division of Corporate and Community Education, Furman University Center for Corporate and Professional Development, University of Minnesota OSHER Institute for Lifelong Learning |
| | Website | http://www.campusce.com/ |
| ellucian. | Reported Strengths | CRM packages include two-way web integration with Banner SIS because Banner is owned by Ellucian. Ellucian also provides the source code for its solutions to its client community so they can make changes to configure the solutions to their needs |
| | Price/Pricing Structure | • Prices for CRM products ranges significantly across each client, but a minimum baseline price is around $50,000 with additional per user license fees offered in volume discounts.<br>• This baseline price includes two-way web integration services to ensure data transfer from the CRM to Banner and Colleague SIS (which also offer semester, term, and open entry/exit enrollment tracking options).<br>• Pricing/payment structure can be flexible according to the university's payment needs but is typically offered initially as an "on premise" or "Software as a Service" (SaaS) deployment. |
| | Customers | *Ellucian did not release customer names.* |
| | Website | http://www.ellucian.com/educationservices/ |
| Enrollment Rx | Reported Strengths | Changes are relatively easy to make to the platform as the compnay operates on a "clicks not code" philosophy. |
| | Price/Pricing Structure | • Implementation and Professional Services: $50k->$100k<br>• Licenses: $1,188/user/year; if non-profit they qualify for 10 Salesforce licenses and additonal individual salesforce licenses at an 80% discount after reaching ten. |
| | Customers | Lasell College, Babson College Olin Graduate School of Business, Michigan State University Broad Graduate School of Management |
| | Website | http://www.enrollmentrx.com/ |

# Tool #24: Higher Education CRM Vendor Primer (cont.)

| Vendor | Key Notes | |
|---|---|---|
| HOBSONS | Reported Strengths | VIP Portals; Owns Intelliworks CRM |
| | Price/Pricing Structure | *Hobsons did not respond to discuss pricing information.* |
| | Customers | *Clients listed on their website:* Purdue University, Stetson University, Presbyterian College, George Mason University, Villanova University, The College of William and Mary, St. Bonaventure University, University of Texas at El Paso |
| | Website | http://www.hobsons.com/education-solutions/solutions/engage-enroll/education-crm-suite/ |
| INTELLIWORKS CONNECT WITH PURPOSE | Reported Strengths | Customizable and user-friendly interfaces; Owned by Hobsons |
| | Price/Pricing Structure | *Intelliworks did not respond to discuss pricing information, but research contacts indicate that pricing is similar to the $40,000 base range, extending upward depending on the service package an institution selects.* |
| | Customers | Empire State College Enrollment and Admissions, Virginia Commonwealth University Graduate Studies, Concordia University Texas Admissions Department, Lourdes College Graduate Admissions, CSU Sacramento External Graduate Programs |
| | Website | http://www.hobsons.com/crm-for-higher-education |
| JENZABAR | Reported Strengths | The Higher Reach product is designed to serve the needs of continuing education units, including non-credit enrollments |
| | Website | http://www.jenzabar.com/higher-ed-solutions/continuing-education-workforce-development / |
| | Price/Pricing Structure | *Jenzabar did not respond to requests to discuss their pricing structure.* |
| | Customers | *Clients listed on their website:* California State University-San Marcos, Hofstra University, Flagler College, Lousiana State University |
| N2N INNOVATION 2 ACTION | Reported Strengths | Can be customized to allow for data transfer with any SIS Product suite spans the student lifecycle with a focus on mobile applications to improve contact between recruiters and prospects |
| | Price/Pricing Structure | One-time product license prices range from $15,000 to $75,000 in addition to annual maintenance fee of 20% of the license fee. |
| | Customers | Kanawha Valley College, Mohawk College, Georgia Perimeter College, Vicennes University |
| | Website | http://n2nservices.com/ |

# Tool #24: Higher Education CRM Vendor Primer (cont.)

| Vendor | Key Notes | |
|---|---|---|
| RightNow | Reported Strengths | Works well for managing multiple public interfaces (websites) with the same back-end system; owned by Oracle |
| | Price/Pricing Structure | • Pricing structure is primarily determined by the number of end users at the institution; all of whom have full access to the product's capabilities<br>• Charged as a monthly subscription to the SaaS product |
| | Website | http://www.oracle.com/us/products/applications/rightnow/overview/index.html?origref=http://en.wikipedia.org/wiki/RightNow_Technologies# |
| | Customers | Distance Minnesota, Minnesota State Colleges and Universities (MNSCU), University of Southern Queensland |
| salesforce foundation | Reported Strengths | Very cost effective if selected for Salesforce Foundation access |
| | Price/Pricing Structure | • Salesforce Foundation offers non-profit institutions access to 10 free user licenses through an application proces,<br>• if the institution wants additional user licenses they can purchase them for $360/user/year<br>• Typical implementation and customization consultation engagements can range from $5k to $20k |
| | Customers | Fresno Pacific University, IESE Business School |
| | Website | http://www.salesforcefoundation.org/ |
| SUGARCRM COMMERCIAL OPEN SOURCE | Reported Strengths | Very low cost depending on the extent of service assistance needed; service costs typically decrease over time as staff are better trained |
| | Price/Pricing Structure | • No upfront implementation fee<br>• Annual user access fee (typically $420-$720/user/year) which includes system functionalities and customer support<br>• Optional implementation consulting service packages are available (typically around $1,500) |
| | Customers | Sim University (Singapore), HEC Groupe (France), Summa College (the Netherlands) |
| | Website | http://www.sugarcrm.com/ |
| TALISMA A Campus Management Solution | Reported Strengths | User-friendly for leads and prospect management |
| | Price/Pricing Structure | *Talisma did not respond to requests for a discussion about pricing structures.* |
| | Customers | Indiana University, University of Illinois at Urbana Champaign, University of Notre Dame |
| | Website | http://www.talisma.com/en-us/products_services/talisma_crm/Pages/TalismaCRM.aspx |

# Tool #24: Higher Education CRM Vendor Primer (cont.)

| Vendor | Key Notes | |
|---|---|---|
| TargetX | Reported Strengths | Company leadership have substantial experience working in higher education |
| | Price/Pricing Structure | • Pricing structure includes an upfront licensing fee for the institution (typically around $40,000) which includes 10 users on campus<br>• Additional users can be added for approximately $120-$250 per user per year<br>• Jenzabar Higher Reach (a continuing education ERP) sells Target X as an optional part of the package, the pricing can fluctuate a bit in sales through Jenzabar |
| | Customers | Pepperdine University, Birmingham Southern College, Southern Polytechnic State University, Alfred University, College of William and Mary, Saint Joseph's University, American University, Kettering University |
| | Website | http://targetx.com |

# Tool #25: Vendor Selection Scorecard

The vendor selection scorecard is intended to help members conduct an objective evaluation of a short list of final candidates. The tool, which helps members focus their assessment on a collection of attributes, can be used during vendor meetings or after the fact. The Scorecard can also be used in the early stages of CRM consideration to help determine your CRM needs or to prime a list of questions for courting vendors.

**Implementation Note**: This scorecard is not meant to be exhaustive. Instead, it should be customized to suit your CRM goals and preferences (see Tool #21: Guide to Understanding You CRM Needs for more assistance).

| | **Vendor 1**<br>______________ | **Vendor 2**<br>______________ | **Vendor 3**<br>______________ |
|---|---|---|---|
| **Track Record** | | | |
| Has experience with Higher Education | | | |
| Has experience with continuing/online/professional education units | | | |
| Is willing to share references | | | |
| References are positive about their overall experience with vendor and product | | | |
| Custom: | | | |
| **Integration** | | | |
| Has integrated with my SIS at other institutions | | | |
| Can integrate (or anticipates being able to integrate) with my SIS | | | |
| Other institutions that integrated the same systems describe the process positively | | | |
| No third party (middleware) necessary for integration with SIS | | | |
| Data import/export will be sufficiently smooth | | | |
| Integrates with my knowledge base (e.g., repository of FAQ answers used by enrollment advisors) | | | |
| Integrates with my legacy system | | | |
| Integrates with my application and admissions software | | | |
| Custom: | | | |
| Custom: | | | |
| **General Features** | | | |
| Saas (Software-as-a-Service) Delivery | | | |
| Interface is simple and intuitive | | | |
| Preferred platform (web-based, Mac, Windows, etc.):<br>________________________ | | | |
| **Marketing Automation Features** | | | |
| Email marketing tool tracks responses and calculates ROI; is robust in terms of managing email volume, design customization, and analytics | | | |
| Can manage mailing list | | | |
| Can track referrals | | | |

# Tool #25: Vendor Selection Scorecard (cont.)

| | **Vendor 1** ________________ | **Vendor 2** ________________ | **Vendor 3** ________________ |
|---|---|---|---|
| Can manage territories | | | |
| Can track the source of inquiries from initial click | | | |
| **Recruitment Automation Features** | | | |
| Can present contact history | | | |
| Can serve as a contact scheduler | | | |
| Provides a prospect database | | | |
| Can manage leads (i.e., can assign stages and score, route, and assign leads) | | | |
| Includes activity tracking and history features | | | |
| Outbound phone calls are easily loaded into system | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| Custom: | | | |
| **Collaboration Features** | | | |
| Chat | | | |
| Mail merge | | | |
| Mobile access | | | |
| Remote tracking | | | |
| Workflow rules and management based on prospect status, prospect action, or time elapsed | | | |
| **Customization Features** | | | |
| Forms and data fields are customizable | | | |
| Features are customizable | | | |
| User interface is customizable | | | |
| **Miscellaneous Features** | | | |
| Can consolidate data from multiple, potentially non-SQL sources | | | |
| Includes an event management tool that can handle invitations, registrations and reminders | | | |
| Forms can still be hosted or appear to be hosted on my site's .edu domain via full HTML or embedded iframes that feed into the CRM (as opposed to running forms from CRM's domain) | | | |

# Tool #25: Vendor Selection Scorecard (cont.)

| | Vendor 1 ______________ | Vendor 2 ______________ | Vendor 3 ______________ |
|---|---|---|---|
| Integrates with social media platforms like Facebook | | | |
| Contact management portion of software is robust and intuitive | | | |
| CRM's built-in data translation/data matching options is adequately mature. (An ideal matching tool includes criteria for finding student data and de-duplicating records. | | | |
| **Reporting** | | | |
| Can produce advanced charts | | | |
| Can build custom reports | | | |
| Can produce customizable forecasting | | | |
| Contains easy-to-use dashboards (overall) | | | |
| Dashboards are customizable | | | |
| Can array multiple dashboards on homepage | | | |
| Dashboard can organize opportunities by lead source | | | |
| Dashboard can visualize sales pipeline | | | |
| Can arrange pre-built reports | | | |
| Can arrange scheduled reports | | | |
| Can arrange SQL reports | | | |
| **Costs** | | | |
| Per-User-Per-Month | | | |
| Are there additional costs for xxx,xxx/unlimited emails? | | | |
| Preferred fee structure: ______________________________ | | | |
| Required hardware | | | |
| Add-On (feature) pricing | | | |
| Additional storage costs | | | |
| Projected total cost | | | |
| Custom: | | | |
| Custom: | | | |
| **Vendor Service** | | | |
| Provides robust assistance during implementation (e.g., onsite representative) | | | |
| Provides continued service post-implementation | | | |
| Customer service and company representatives are friendly and available during the exploration phase | | | |
| Customer service and company representatives consistently have solid answers to questions and when they don't, they are not evasive or vague | | | |
| Custom: | | | |
| Custom: | | | |

# Tool #25: Vendor Selection Scorecard (cont.)

**Notes**

# Tool #26: Vendor Selection Committee Guidelines

Although the COE Forum recommends that the most efficient vendor selection processes typically consists of only the three to five members of the CRM leadership team (with input from different issue and process owners as needed), some organizations choose to create larger vendor-selection committees for staff buy-in purposes. Large vendor-selection committees can facilitate sharing of needs and goals among staff across unit departments but they can also require a greater time commitment from more staff and also extend the implementation time frame. The resources below are intended to help members expedite the committee process and build consensus among diverse stakeholders on vendor-selection committees. The tool also provides committee members with resources for collecting input from their respective departments. Although designed for use among COE units and their department representatives, this tool could also be brought to bear in a university-wide CRM implementation.

## Selecting Department Representatives

Ask department staff to complete the worksheet below if leaders plan to organize a vendor selection committee.

### Nominations for Vendor Review Committee Members

Please review the responsibilities of committee members listed below and nominate a representative from your department. A selection will be made from the nominees with the top three highest number of votes.

Responsibilities of Committee Members

- Meet six times over the course of three months; committee members must provide their availability to the committee coordinator and attend at least 75 percent of meetings
- Read and be prepared to discuss all vendor proposals
- Collect input from their department and share input with the rest of the committee.
- Make a final recommendation with majority consensus to unit leaders (*[include titles here]*), who will make final selection with strong consideration for the committee's recommendation

| Department | Nominee | Department | Nominee |
|---|---|---|---|
| Marketing and Recruitment | | Instructors | |
| IT and Analytics | | Program Administrators | |
| Advising and Retention | | Corporate Training | |
| Non-credit Staff | | Other: | |

# Tool #26: Vendor Selection Committee Guidelines (cont.)

## Gathering Department-Wide Feedback on Vendor Functionality

Complete the worksheet below using Tool 25: Vendor Selection Scorecard by checking the functionality or characteristic that each prospective vendor offers.  Then distribute the worksheet to department liaisons and ask them to collect colleagues' input in the right-most column.

### Sample Department Meeting Agenda

Facilitator: Committee member representing department

Directions

- Review the scorecard below and circle criteria  of greatest importance for each category
- Keeping your circles in mind, enter a #1 choice for each criteria category (e.g., track record or integration)
- Discuss outcome with the committee representative

Representative Scorecard Completed with Hypothetical Scores

| | **Vendor 1**<br>Alpha Vendor | **Vendor 2**<br>Beta Vendor | **Vendor 3**<br>Gamma Vendor | **Top Choice Vendor** |
|---|---|---|---|---|
| **Track Record** | | | | **#1:** |
| Has experience with Higher Education | ✓ | ✓ | | |
| Has experience with continuing/online/professional education units | | ✓ | | |
| Is willing to share references | ✓ | ✓ | ✓ | |
| References are positive about their overall experience with vendor and product | | | ✓ | |
| **Integration** | | | | **#1:** |
| Has integrated with my SIS at other institutions | ✓ | | | |
| Can integrate (or anticipates being able to integrate) with my SIS | ✓ | | ✓ | |
| **Other Categories as Applicable** | | | | |
| [Add criteria here.] | | | | |

Department staff opine here

# Tool #27: CRM Resource Intensity Comparison Chart

CRM, though well-established in other industries, is still rather nascent in the postsecondary education space. CRM champions working within continuing, professional, and online education units typically bring with them some CRM experience that encourages them to advocate for implementing a system. This experience, however, does not necessarily equip them with an understanding of the funding, staff, and time required for implementation. This information is critical both for making the case for CRM to unit leadership and for accurately budgeting resources.

The CRM Resource Intensity Comparison Chart is informed by interviews with over 100 COE units that went through the implementation process and is designed to help decide between the three levels of customization are appropriate given a unit's goals, budget, and organizational readiness  for change.

## Factors Informing Investment

- **Complexity of CRM Needs**. The answers to the following questions should allow you to classify your CRM needs into one of the three categories listed below:
    - What are your short- and long-term goals for CRM?
    - How much customization will your CRM solution require? Will forms, fields, and workflows all need to be configured to meet special requirements or unique business processes?
    - Will CRM need to be cross-function, encompassing multiple departments? How many other systems will CRM need to integrate with?

**Categories of CRM Needs**

- Basic CRM: an "out-of-the-box" deployment that will allow you to use the system as-is; a deployment that is contained to one or two units with little-to-no cross-functionality
- Tailored CRM: an implementation that will require some customization of forms, fields, and workflows in the system to better align with your organization's processes; will also likely require some customized reporting tools; may involve a small amount of cross-functionality
- Extended CRM: an advanced implementation that requires extensive customization, integration, reporting, and cross-functionality

- **CRM Readiness of Organization.** CRM is an intrinsically human-driven set of processes that is supported by technical infrastructure. Therefore, staffs' readiness to adopt CRM is a big X factor when determining the time and resources (both human and financial) the project will require. See Tool #20: Stakeholder Process Improvement Forms for guidance on how to encourage staff buy-in.

## Overview of CRM Investment

| Your Investment in: | Basic CRM | Tailored CRM | Extended CRM |
|---|---|---|---|
| **Estimated Time to Go Live** | 1-2 months | 6-9 months | 12 months+ |
| **Estimated Services Budget*** | $15-20K | $25-45K | $50K |
| **Recommended Human Resources**<br>(can be drawn from current staff if expertise is present) | Power user, process expert(s) | System admin., IT staff, process expert(s) | CRM database admin., IT director, process expert(s) |

* This does not include cost of the software package, which can vary widely. For more guidance on this topic, see Tool #24: Higher Education CRM Vendor Primer.

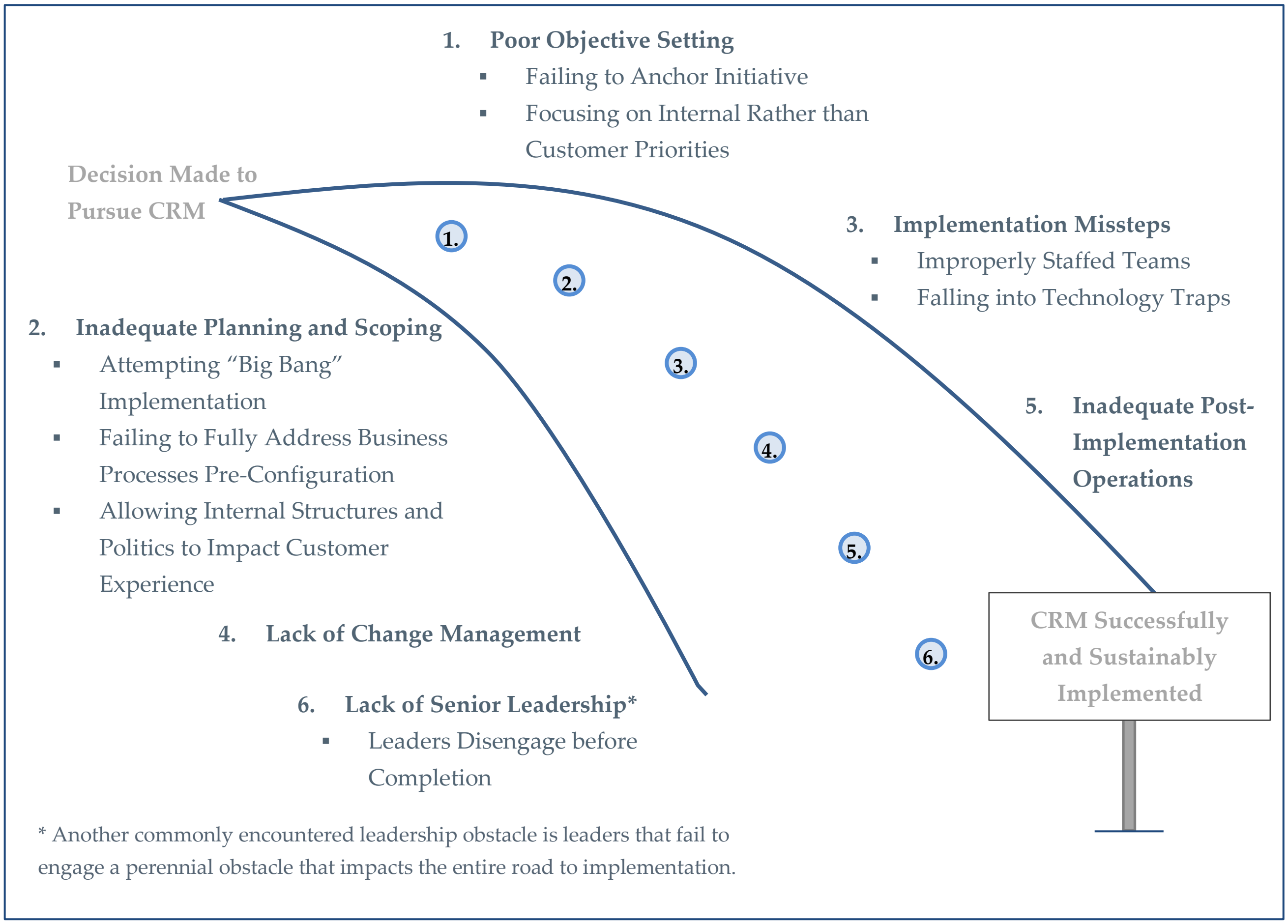
# Tool #28: CRM Risk Point Map

Because CRM changes the way an organization interacts with constituents and therefore the jobs of many staff members, CRM implementations are quite susceptible to failure. Pulling insight from CRM's long and often rocky track record in for-profit industries, the aim of the Map of CRM Risk Points is to counter the potential for failure by alerting CRM leaders to the most common roadblocks.

**Implementation Note**: The CRM Risk Point Map is best used to foster discussion among the CRM Steering Committee (See Tool #31: CRM Leadership Structure Guide for more information about who should be included on this team). More specifically, the contents of this tool should be top-of-mind as the Steering Committee builds out the CRM Roadmap and considers how best to reverse engineer implementation steps in light of the common obstacles outlined here.

## Obstacles along the Road to Successful Implementation

The following roadmap depicts the obstacles that most commonly impede progress towards successful CRM implementation. Observe the summary here, and move on to the rest of the tool for in-depth explanations of the obstacles.



1. **Poor Objective Setting**
    - Failing to Anchor Initiative
    - Focusing on Internal Rather than Customer Priorities
2. **Inadequate Planning and Scoping**
    - Attempting "Big Bang" Implementation
    - Failing to Fully Address Business Processes Pre-Configuration
    - Allowing Internal Structures and Politics to Impact Customer Experience
3. **Implementation Missteps**
    - Improperly Staffed Teams
    - Falling into Technology Traps
4. **Lack of Change Management**
5. **Inadequate Post-Implementation Operations**
6. **Lack of Senior Leadership***
    - Leaders Disengage before Completion

* Another commonly encountered leadership obstacle is leaders that fail to engage a perennial obstacle that impacts the entire road to implementation.

# Tool #28: CRM Risk Point Map (cont.)

## 1. Poor Objective Setting

These failures relate to the overall aims of the CRM initiative. In many ways, these are the most common causes of CRM failures because poorly defined goals complicate downstream efforts and undermine end results.

### *Failing to Anchor the Initiative*

Planning and implementing CRM projects is a difficult job requiring experienced program managers capable of shepherding policy, processes, people, and technology change while keeping all branches of an organization and the vendor(s) in concert. Successful initiatives tend to be anchored firmly in the objectives they set. Three common objectives include 1) making select strategic changes, 2) re-platforming existing processes, or 3) converting current process to best practices.

Without clarity around the type of goals being pursued, projects tend to default to a hodge-podge of all three objectives. In this unsatisfactory situation, few within the organization agree on the goals. Without alignment and strong leadership, decision making is difficult, compromises are rife, and initiatives tend to limp across the finish line late and without fully satisfying any stakeholders.

### *Focusing on Internal Rather than Customer Priorities*

In pursuing CRM, many organizations focus on existing customer processes rather than enhancing or building new interactions that customers may prefer. In these cases they succumb to a common pitfall:  spending too little time critically evaluating their current operations from the customer's perspective.

## 2. Inadequate Planning and Scope Setting

After objectives have been set, organizations often stumble at the critical planning stage. Attempting too much, failure to address vital changes to business processes, and organizational roadblocks are all commonly encountered hindrances.

### *Attempting "Big Bang" Implementations*

Organizations often try to satisfy the needs of too many areas with each initiative, bloating the scope in a "boil the ocean" approach to CRM—a COE unit might, for example, try to implement a CRM solution that immediately involves marketing, recruiting, student retention, and alumni affairs.  Over-configuration makes CRM tools difficult to use, and an incomplete business process review can leave new processes suboptimal, thereby hindering new system "stickiness." Overly ambitious goals can also severely slow down launches.

A more incremental, localized approach to CRM implementation is much easier to manage, though it can hinder firm-wide buy-in. However, continuing education practitioners are quick to realize the benefits of the smaller-scale implementation. Typical small-scale CRM launches occur in the marketing or recruiting division and grow to other departments from there.

### *Failing to Adequately Address Business Processes Pre-Configuration*

Surveys of CRM project successes and failure reveal that lack of time and attention to business processes is one of the most common failure factors. Well-outlined processes define the sequence of recruitment or marketing events and help identify the information passed from one person or department to another. If new tools enable new tasks or alter existing ones, the impact on business process needs to be defined before technology launch. Even if the users of the tools understand the reasons for change in their procedures, the people in neighboring departments might not.

# Tool #28: CRM Risk Point Map (cont.)

Another common failure in defining scope is a tendency to automate current practices without addressing the redundancies, outmoded practices, and other problems that might be engrained in existing business processes. In migrating to a new system, business users tend to fixate on not losing any current functionality. Yet few spend enough time objectively assessing how valuable current functionality really is. Some dangers of “digitizing the cow paths” follow:

- Perpetuating existing process flaws. Duplicating current processes in new software packages without addressing flaws, outmoded practices, or redundancies in current processes.
- Over-investing in nonstrategic processes. Spending too much effort on re-automating or improving practices that do not provide competitive advantage. This can result in over-customization of the CRM tool, leading to technical complexity, buggy software, poor usability, and poor performance. Over-investing in the wrong areas also result in under-investing in processes that do provide advantages.
- Overwriting unique processes. Undermining the unit’s advantage by overwriting important proprietary processes with generic best practices.
- Failing to update processes. Failing to update key processes to reflect the implementation of new tools.

New tools can be very difficult to use effectively and envisioned success difficult to realize if old processes remain untouched.

### *Allowing Internal Structure and Politics to Affect Customer Experience*

Organizations often fail to realize the extent to which their internal structure affects customer experience. Prospects are often frustrated as they attempt to find answers to their questions and to submit all application materials. One of the goals of CRM is to improve enterprise-wide coordination for the benefit of customers, but often, well-designed front-end customer interactions are foiled behind the scenes by outdated internal workings. For insight into how one institution encouraged staff to keep customers top of mind, see Tool# 34: Profile of a CRM Rotation Program.

## 3. Implementation Missteps

Many implementation missteps are common to the management of any major initiative, including following a proven methodology, risk analysis and mitigation, scope creep, and sound schedule and budget management. Improperly staffed teams and ”technology traps” comprise two particular challenges for CRM implementations.

### *Improperly Staffed Teams*

Most for-profit organizations staff teams with too many technical people and not enough business users. In continuing education, the opposite is quite common; technical representation is minimal and involved in discussions pertaining to the basics of integration. Without well-balanced teams, tasks cannot be achieved in the allotted timeframe and decisions tend to be skewed. The omission of technical representatives results in a CRM system that does not integrate with other systems and other fundamental incompatibilities that severely restrict the usability of the tool.

Even when technical staff and business users are represented, teams can be poorly balanced with one particular group or business area, typically an original sponsor of the initiative or the most active participant in the implementation, dominating representation. Additionally, since CRM initiatives require so much interaction, personal relationships can override sound decision making.

### *Falling into Technology Traps*

Although technology is typically not the most common cause of failure, its complexity requires projects to be carefully planned and properly budgeted and staffed. In addition, delays in policy, process, and organizational decisions can cause teams to rush through vital engineering and technology tasks. In many cases, technology teams are forced to make assumptions about system functionality due to long delays in business decisions. Mistakes require time-

# Tool #28: CRM Risk Point Map (cont.)

consuming rework or cause disconnects between how business and technology staff believe the system should be working.

In general, technology issues arise when:

- Using new and untested technologies in critical situations
- Dedicating inadequate little testing time to the technology implementation
- Failing to spend enough time understanding, gathering, and preparing organizational data
- Underestimating the complexity and cost of integrating one technology system with another
- Over-customizing CRM tools, leading to installations that are buggy and slow

## 4. Lack of Change Management

CRM initiatives significantly impact job roles, skills, and the daily routine of an organization. They are often disruptive and initially unpopular among staff. Without adequate preparation, employees and even entire departments will be apathetic or even hostile to the change. Yet many organizations fail to assign time in their plans to help staff prepare for change. In fact, change management is often the first item struck from proposed plans and budgets because executives who have bought into the initiative may assume that employees are as excited as they are. On the other hand, generating excitement about CRM can lead to inflated expectations, which erodes confidence, satisfaction, and sustained use of the system. Instead, set realistic expectations about change in their job activities and related business process goals. See Tool #20: Stakeholder Process Improvement Feedback Forms for more guidance on this topic.

## 5. Inadequate Post-Implementation Operation

CRM is an ongoing process not an event. It must be carefully managed over time, even after a successful rollout. Even if excellent user adoption is at first achieved, success will fade if CRM is not engrained in the management and process and philosophy of an organization. As long as it remains just another initiative, project, or computer system, CRM is likely to fail. To avoid this, organizations must define measures of success and monitor the results of new approaches and tool usage.

## 6. Lack of Senior Leadership

In many organizations, top management is either not engaged with CRM initiatives at all, loses interest once the initial high-level decisions have been made, or does not focus long enough to ensure successful post-implementation operation. These kinds of leadership shortfalls can have a significant negative impact on CRM initiatives.

### *Leaders Fail to Engage*

Organizational leaders should be involved early in the CRM initiative to ensure that plans for the new system map to strategic goals. Their voice is also critical to encouraging early utilization and clean data (i.e., intelligent coding, consistent input, etc.). Successful implementations require healthy executive-level leadership for vision and cheerleading in addition to leadership from a steering committee that incorporates IT and business owners.

Newly hired executives unsupportive of current or past CRM initiatives represent another leadership hurdle. Often, these leaders have their own ideas of process reform, which leads to confusion, apathy, and even opposition.

# Tool #28: CRM Risk Point Map (cont.)

## *Leaders Disengage before Mission is Accomplished*

Even after high-level planning and approval is achieved, senior executives must stay informed about the program through completion and beyond. Executives often damagingly lose interest once the project is underway with teams losing control and the various areas of the organization becoming unaligned. Additionally, after implementation, organizations often fail to carry out measurement procedures to assess how well the initiative is performing in light of original goals and bottom-line metrics. Executive leadership is instrumental in setting an ongoing expectation for up-to-date ROI metrics and KPIs.

# Tool #29: End User Memorandum of Understanding Builder

Many CRM leaders encounter difficulty when encouraging staff utilization. The wide scope of many CRM implementations can leave staff with a limited understanding of how the implementation will affect their roles, thereby slowing CRM adoption. If staff are to follow-through with CRM utilization, they must first understand their new responsibilities under the new system. Some CRM leaders have found it useful to garner this commitment and communal understanding through a Memorandum of Understanding (MOU) that covers all end-users.

The End-User Memorandum of Understanding Builder will outline the key components that should be included in such a document while also providing an example of one higher education institution's CRM MOU with end-users in the undergraduate and graduate divisions.

## Anatomy of a CRM End-User MOU

**University X CRM Service Levels MOU**

I. Summary
II. Service Descriptions
III. Roles and Responsibilities
IV. Service Levels
V. Service Review and Auditing
VI. Signatures

**I. Summary**

- a. Subjects of the MOU listed out according to the most appropriate organizational unit (e.g., offices, units, divisions, etc.)
- b. CRM platform + vendor relationship addressed in the MOU
- c. Aim of the MOU (e.g., articulating responsibilities, defining scope, identifying participating units)
- d. Protocol for updates to the MOU

**II. Service Description**

- a. Scope of CRM (i.e., functionality categories and specific business processes)
- b. Intended purpose (i.e., what the CRM will be used for)
- c. Restrictions (i.e., what the CRM will not be used for)

**III. Roles and Responsibilities**

- a. For each group of constituents (e.g., business units, application owners, IT, vendor, end-users) an outline of CRM-related responsibilities

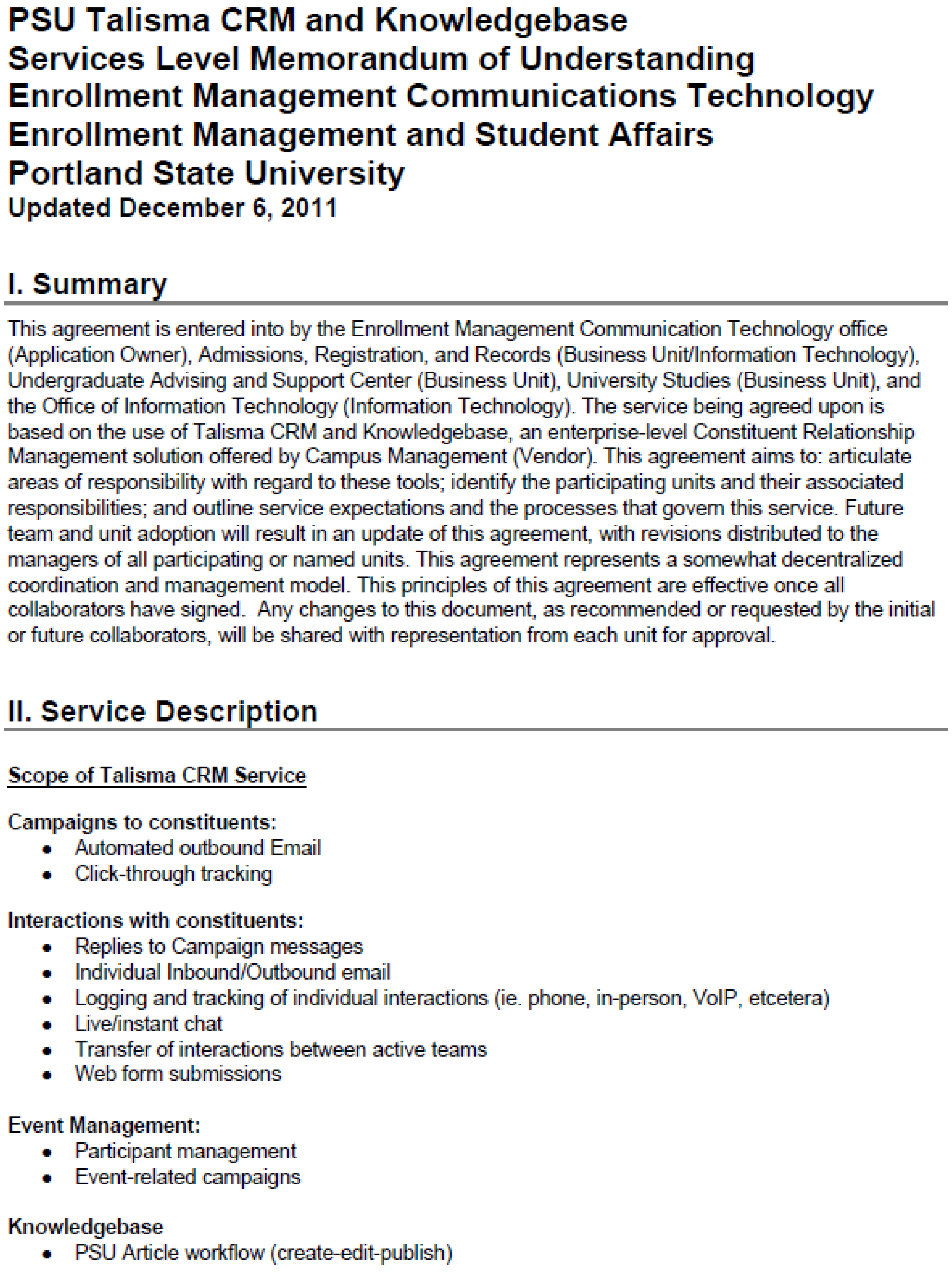
**IV. Service Levels**

- a. Service expectations:
    - **i.** Operating times (i.e., the business hours during which end-users should be active in the CRM system)
    - ii. Maintenance times (i.e., the hours during which the system will undergo planned maintenance by the vendor)

        - **iii.** Backup and recovery (i.e., the schedule for automatic updates and backups and the contingency plan in the case of a total system failure)
    - b. Service support services
        - **i.** Source of support for different user "tiers" (assigned based on degree of administrative access to and familiarity with the system) and how to report questions and difficulties
        - **ii.** List of constituents each tier supports (if applicable)
        - **iii.** Expectations for response time to most common support requests
    - c. Managing changes to CRM system
        - **i.** Definitions of types of changes (e.g., business configuration, localized application, data integration, etc.)
        - **ii.** Model for defining the roles and responsibilities of parties involved in the change
    - d. Process of initiating a change to the CRM system (i.e., the different types of changes and the protocol associated with initiating and executing each)
    - e. Change conflict (i.e., the recourse followed if a proposed change leads to conflict and the issue must be escalated)
    - f. Change documentation (i.e., the party responsible for collecting and maintaining all change-related documentation)
- **V. Service Review and Auditing**
    - a. Parties responsible for different types of service review and auditing (e.g., with the addition of new business units, ongoing review, yearly review, executive review, etc.)
- **VI. Signatures**
    - a. Relevant office/unit/department leaders and CRM leaders
    - b. Conference session (e.g., once all approvals have been received, MOU is made available to all end-users for review and consultation)

## Example of a CRM End-User MOU

*Many thanks to Portland State University for sharing their MOU, a modification of a Services Level Agreement provided to them by Penn State University.*



# PSU Talisma CRM and Knowledgebase
# Services Level Memorandum of Understanding
# Enrollment Management Communications Technology
# Enrollment Management and Student Affairs
# Portland State University

**Updated December 6, 2011**

## I. Summary

This agreement is entered into by the Enrollment Management Communication Technology office (Application Owner), Admissions, Registration, and Records (Business Unit/Information Technology), Undergraduate Advising and Support Center (Business Unit), University Studies (Business Unit), and the Office of Information Technology (Information Technology). The service being agreed upon is based on the use of Talisma CRM and Knowledgebase, an enterprise-level Constituent Relationship Management solution offered by Campus Management (Vendor). This agreement aims to: articulate areas of responsibility with regard to these tools; identify the participating units and their associated responsibilities; and outline service expectations and the processes that govern this service. Future team and unit adoption will result in an update of this agreement, with revisions distributed to the managers of all participating or named units. This agreement represents a somewhat decentralized coordination and management model. This principles of this agreement are effective once all collaborators have signed. Any changes to this document, as recommended or requested by the initial or future collaborators, will be shared with representation from each unit for approval.

## II. Service Description

**Scope of Talisma CRM Service**

**Campaigns to constituents:**
- Automated outbound Email
- Click-through tracking

**Interactions with constituents:**
- Replies to Campaign messages
- Individual Inbound/Outbound email
- Logging and tracking of individual interactions (ie. phone, in-person, VoIP, etcetera)
- Live/instant chat
- Transfer of interactions between active teams
- Web form submissions

**Event Management:**
- Participant management
- Event-related campaigns

**Knowledgebase**
- PSU Article workflow (create-edit-publish)

- Constituent Portal Management
- End-User Access to Knowledge Base administrative tools

**User Workspace:**
- End-User Access into Talisma system
- Customizable workspaces to help end-users manage daily tasks
- End-User documentation for training purposes

**Supplemental Data Collection and Integration:**
- Batch - Routine imports/exports
- On-Demand – Occasional imports/exports available upon request

**Reporting:**
- Metrics on operations within scope of Talisma CRM
- Campaign results/ROI

### Assumptions

Systems of Record: Talisma will become the system of record for Admissions prospects/recruits and constituent communication. Other data provided to the Talisma CRM is governed by the originating data source. Currently data is being imported from Banner, Enterprise LDAP, and StarRez. On-demand University Studies survey data will also be imported into Talisma CRM. Authority of these systems lives with the relevant system mangers. The expectation is that business updates and management of data is completed in the appropriate system of record in as timely a fashion as possible and within the constraints of the business operation.

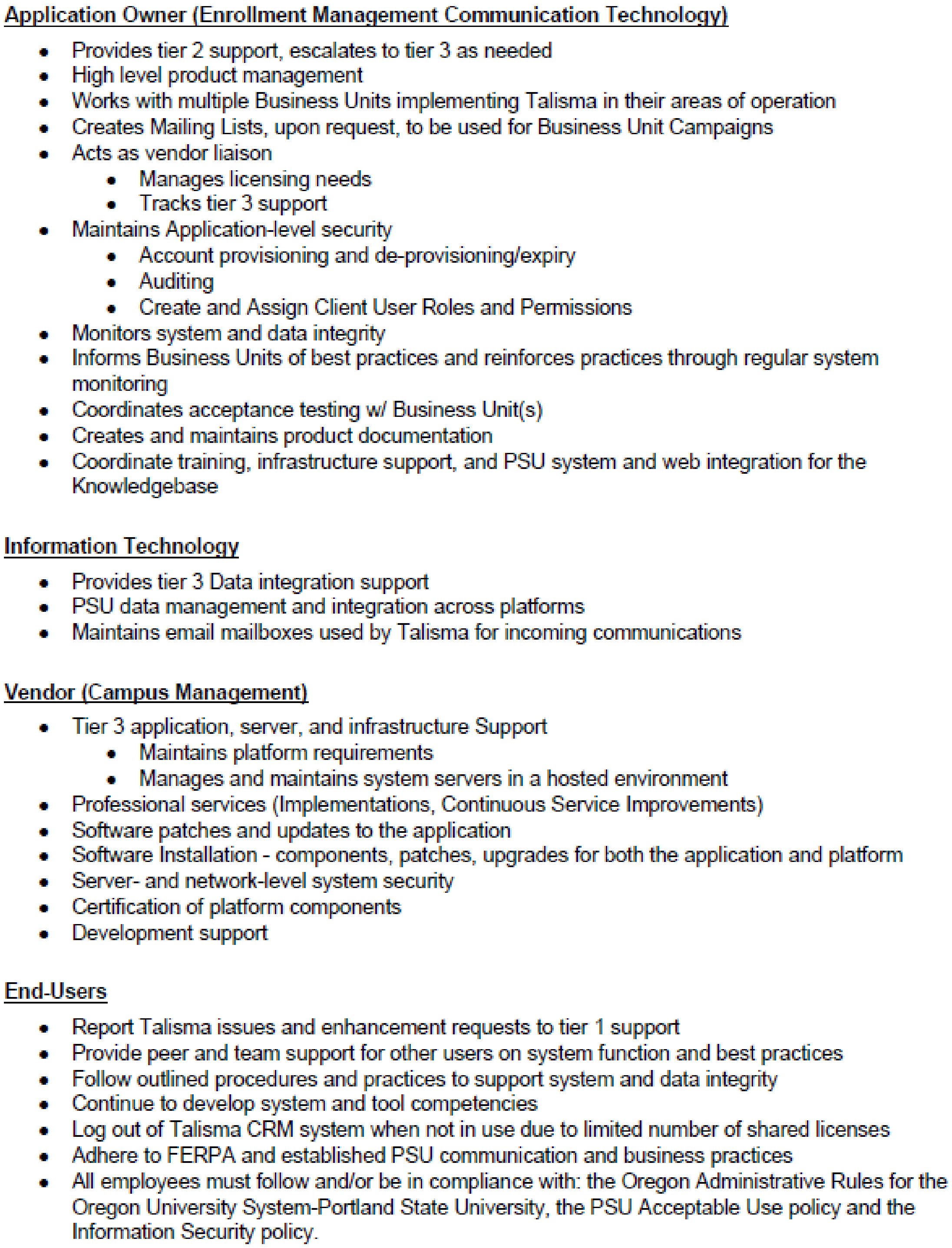
**Talisma is for:**
- Undergraduate & graduate prospect/recruit repository
- Constituent communications management
- Reporting on communication and recruitment efforts
- Limited data access for official University business purposes

**Talisma is NOT for:**
- Admissions application Management
- General University data reporting
- Official University reporting on data that is not native to Talisma

## III. Roles and Responsibilities

### Business Units

- Provide tier 1 end-user support, escalates to tier 2 as needed
- Client installation and configuration
- Facilitate/coordinate Talisma End-user training and adherence to best practices
- Monitoring of Business Configuration
  - Key performance metrics
  - Campaign firing
- Acceptance testing w/ Application Owner as future software upgrades are implemented
- Knowledgebase content creation and management



### Application Owner (Enrollment Management Communication Technology)

- Provides tier 2 support, escalates to tier 3 as needed
- High level product management
- Works with multiple Business Units implementing Talisma in their areas of operation
- Creates Mailing Lists, upon request, to be used for Business Unit Campaigns
- Acts as vendor liaison
    - Manages licensing needs
    - Tracks tier 3 support
- Maintains Application-level security
    - Account provisioning and de-provisioning/expiry
    - Auditing
    - Create and Assign Client User Roles and Permissions
- Monitors system and data integrity
- Informs Business Units of best practices and reinforces practices through regular system monitoring
- Coordinates acceptance testing w/ Business Unit(s)
- Creates and maintains product documentation
- Coordinate training, infrastructure support, and PSU system and web integration for the Knowledgebase

### Information Technology

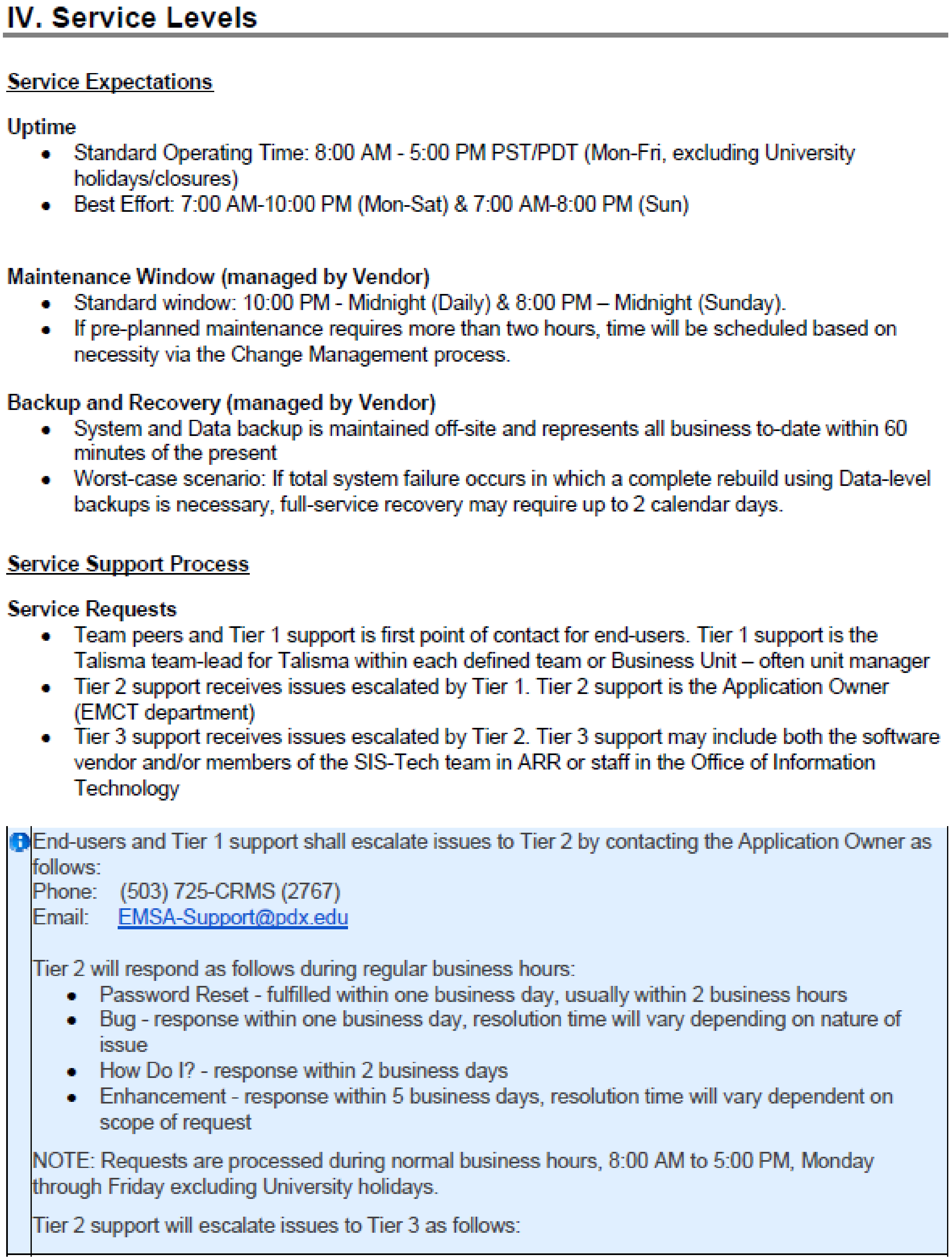
- Provides tier 3 Data integration support
- PSU data management and integration across platforms
- Maintains email mailboxes used by Talisma for incoming communications

### Vendor (Campus Management)

- Tier 3 application, server, and infrastructure Support
    - Maintains platform requirements
    - Manages and maintains system servers in a hosted environment
- Professional services (Implementations, Continuous Service Improvements)
- Software patches and updates to the application
- Software Installation - components, patches, upgrades for both the application and platform
- Server- and network-level system security
- Certification of platform components
- Development support

### End-Users

- Report Talisma issues and enhancement requests to tier 1 support
- Provide peer and team support for other users on system function and best practices
- Follow outlined procedures and practices to support system and data integrity
- Continue to develop system and tool competencies
- Log out of Talisma CRM system when not in use due to limited number of shared licenses
- Adhere to FERPA and established PSU communication and business practices
- All employees must follow and/or be in compliance with: the Oregon Administrative Rules for the Oregon University System-Portland State University, the PSU Acceptable Use policy and the Information Security policy.



## IV. Service Levels

**Service Expectations**

**Uptime**

- Standard Operating Time: 8:00 AM - 5:00 PM PST/PDT (Mon-Fri, excluding University holidays/closures)
- Best Effort: 7:00 AM-10:00 PM (Mon-Sat) & 7:00 AM-8:00 PM (Sun)

**Maintenance Window (managed by Vendor)**

- Standard window: 10:00 PM - Midnight (Daily) & 8:00 PM – Midnight (Sunday).
- If pre-planned maintenance requires more than two hours, time will be scheduled based on necessity via the Change Management process.

**Backup and Recovery (managed by Vendor)**

- System and Data backup is maintained off-site and represents all business to-date within 60 minutes of the present
- Worst-case scenario: If total system failure occurs in which a complete rebuild using Data-level backups is necessary, full-service recovery may require up to 2 calendar days.

**Service Support Process**

**Service Requests**

- Team peers and Tier 1 support is first point of contact for end-users. Tier 1 support is the Talisma team-lead for Talisma within each defined team or Business Unit – often unit manager
- Tier 2 support receives issues escalated by Tier 1. Tier 2 support is the Application Owner (EMCT department)
- Tier 3 support receives issues escalated by Tier 2. Tier 3 support may include both the software vendor and/or members of the SIS-Tech team in ARR or staff in the Office of Information Technology

End-users and Tier 1 support shall escalate issues to Tier 2 by contacting the Application Owner as follows:

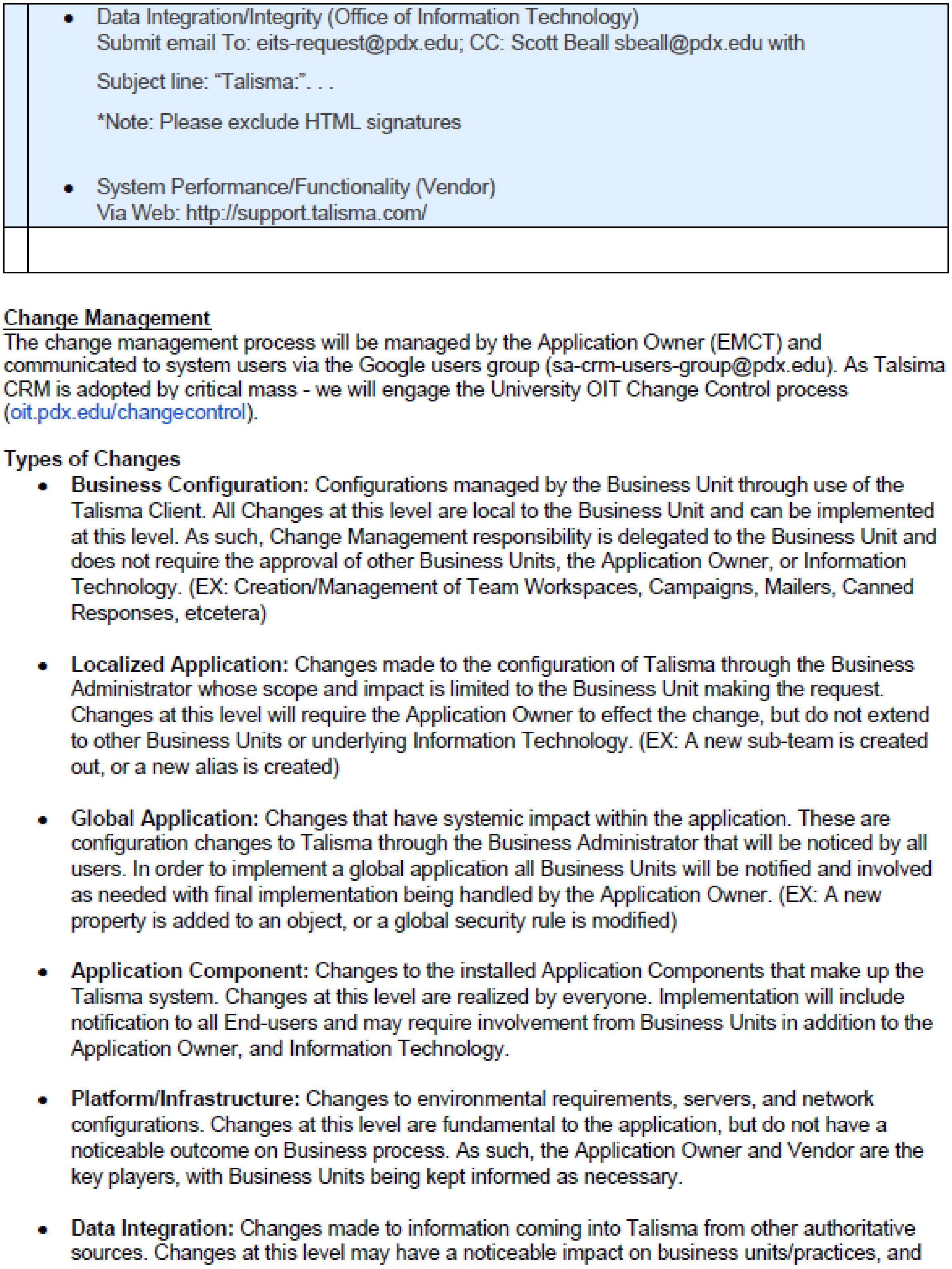
Phone: (503) 725-CRMS (2767)
Email: EMSA-Support@pdx.edu

Tier 2 will respond as follows during regular business hours:

- Password Reset - fulfilled within one business day, usually within 2 business hours
- Bug - response within one business day, resolution time will vary depending on nature of issue
- How Do I? - response within 2 business days
- Enhancement - response within 5 business days, resolution time will vary dependent on scope of request

NOTE: Requests are processed during normal business hours, 8:00 AM to 5:00 PM, Monday through Friday excluding University holidays.

Tier 2 support will escalate issues to Tier 3 as follows:



| | |
|---|---|
| | • Data Integration/Integrity (Office of Information Technology)<br>Submit email To: eits-request@pdx.edu; CC: Scott Beall sbeall@pdx.edu with<br>Subject line: “Talisma:”. . .<br>*Note: Please exclude HTML signatures<br>• System Performance/Functionality (Vendor)<br>Via Web: http://support.talisma.com/ |
| | |

**Change Management**
The change management process will be managed by the Application Owner (EMCT) and communicated to system users via the Google users group (sa-crm-users-group@pdx.edu). As Talsima CRM is adopted by critical mass - we will engage the University OIT Change Control process (oit.pdx.edu/changecontrol).

**Types of Changes**

- **Business Configuration:** Configurations managed by the Business Unit through use of the Talisma Client. All Changes at this level are local to the Business Unit and can be implemented at this level. As such, Change Management responsibility is delegated to the Business Unit and does not require the approval of other Business Units, the Application Owner, or Information Technology. (EX: Creation/Management of Team Workspaces, Campaigns, Mailers, Canned Responses, etcetera)

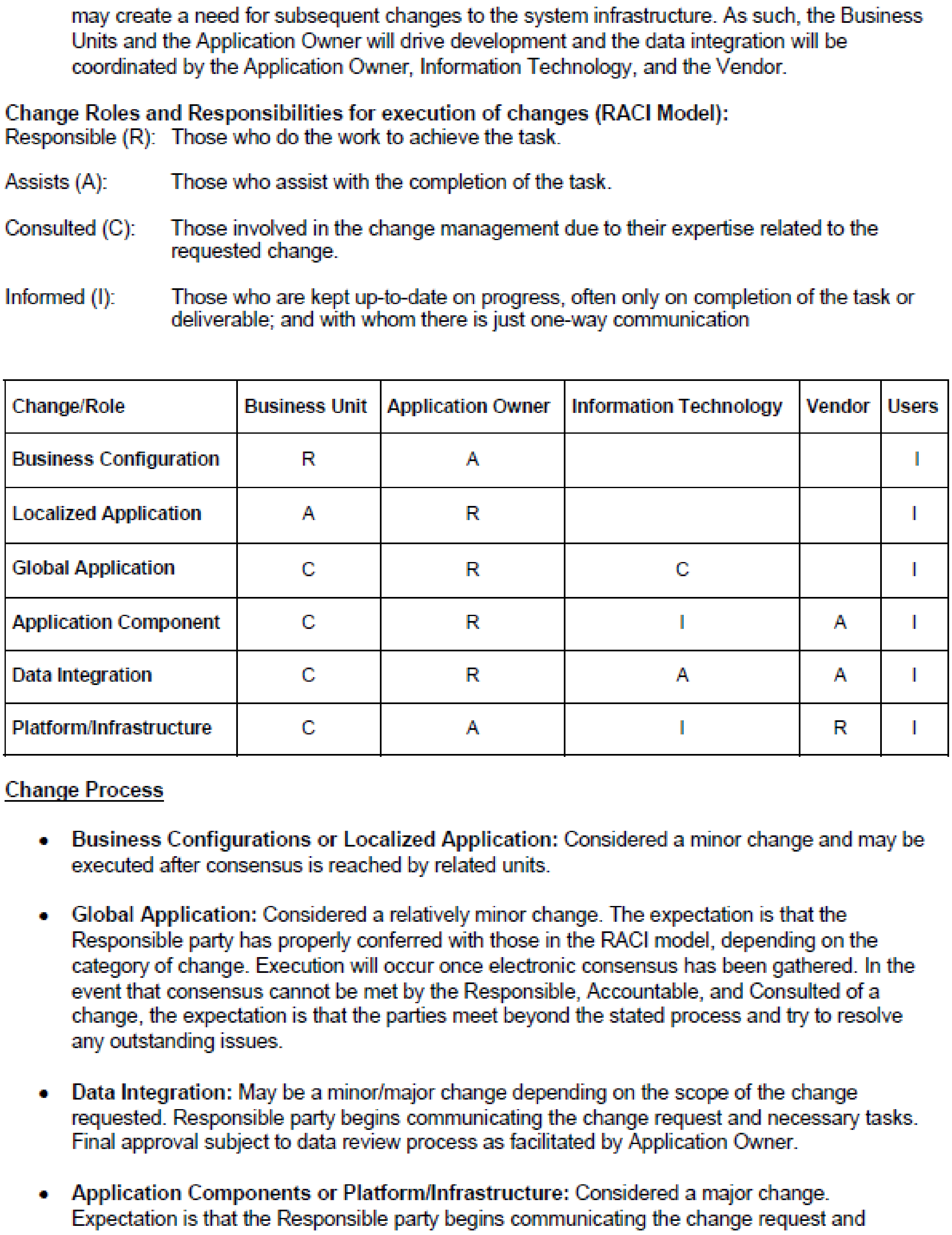
- **Localized Application:** Changes made to the configuration of Talisma through the Business Administrator whose scope and impact is limited to the Business Unit making the request. Changes at this level will require the Application Owner to effect the change, but do not extend to other Business Units or underlying Information Technology. (EX: A new sub-team is created out, or a new alias is created)

- **Global Application:** Changes that have systemic impact within the application. These are configuration changes to Talisma through the Business Administrator that will be noticed by all users. In order to implement a global application all Business Units will be notified and involved as needed with final implementation being handled by the Application Owner. (EX: A new property is added to an object, or a global security rule is modified)

- **Application Component:** Changes to the installed Application Components that make up the Talisma system. Changes at this level are realized by everyone. Implementation will include notification to all End-users and may require involvement from Business Units in addition to the Application Owner, and Information Technology.

- **Platform/Infrastructure:** Changes to environmental requirements, servers, and network configurations. Changes at this level are fundamental to the application, but do not have a noticeable outcome on Business process. As such, the Application Owner and Vendor are the key players, with Business Units being kept informed as necessary.

- **Data Integration:** Changes made to information coming into Talisma from other authoritative sources. Changes at this level may have a noticeable impact on business units/practices, and



may create a need for subsequent changes to the system infrastructure. As such, the Business Units and the Application Owner will drive development and the data integration will be coordinated by the Application Owner, Information Technology, and the Vendor.

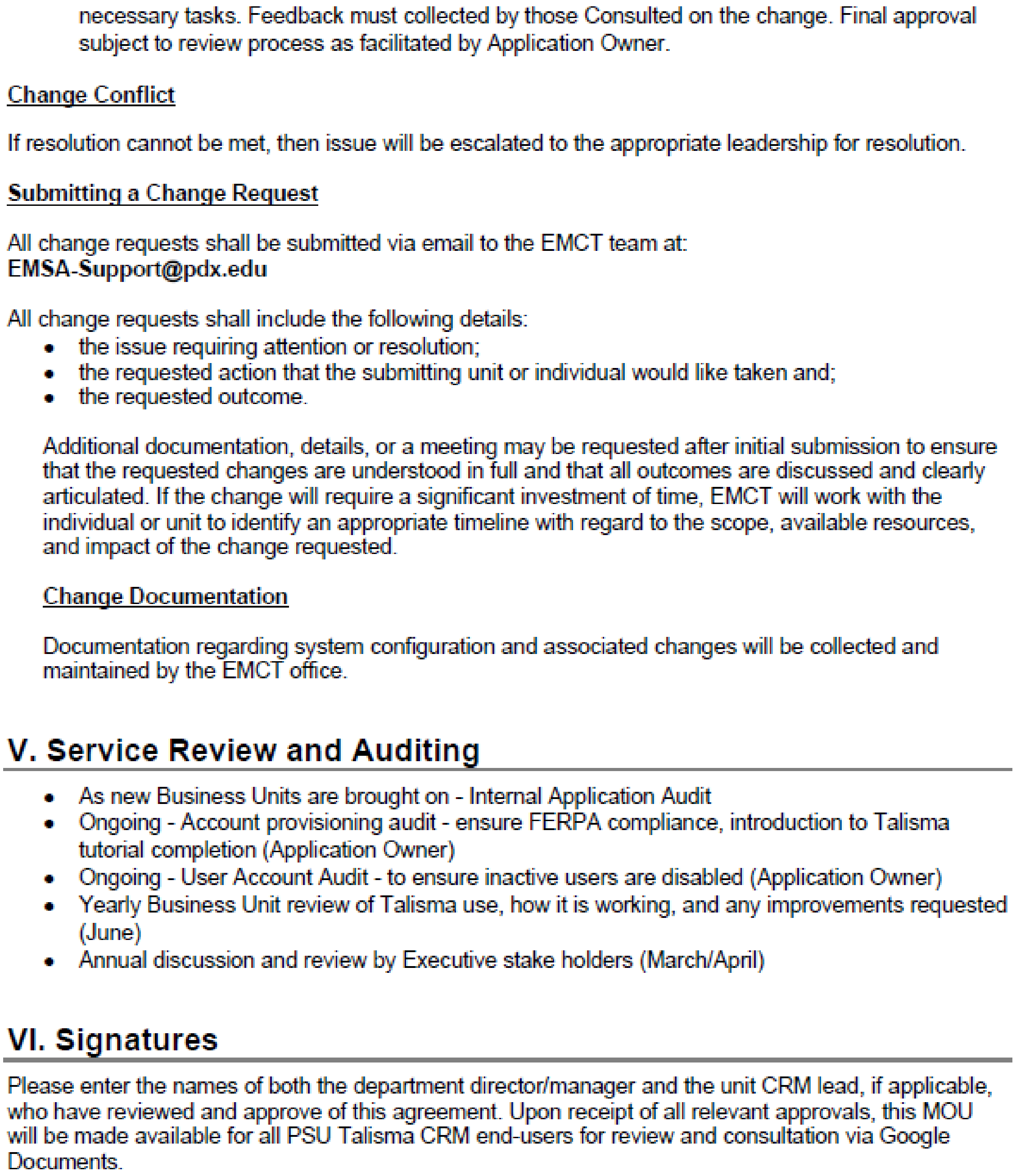
**Change Roles and Responsibilities for execution of changes (RACI Model):**

| | |
|---|---|
| Responsible (R): | Those who do the work to achieve the task. |
| Assists (A): | Those who assist with the completion of the task. |
| Consulted (C): | Those involved in the change management due to their expertise related to the requested change. |
| Informed (I): | Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication |

| Change/Role | Business Unit | Application Owner | Information Technology | Vendor | Users |
|---|---|---|---|---|---|
| **Business Configuration** | R | A | | | I |
| **Localized Application** | A | R | | | I |
| **Global Application** | C | R | C | | I |
| **Application Component** | C | R | I | A | I |
| **Data Integration** | C | R | A | A | I |
| **Platform/Infrastructure** | C | A | I | R | I |

**Change Process**

- **Business Configurations or Localized Application:** Considered a minor change and may be executed after consensus is reached by related units.
- **Global Application:** Considered a relatively minor change. The expectation is that the Responsible party has properly conferred with those in the RACI model, depending on the category of change. Execution will occur once electronic consensus has been gathered. In the event that consensus cannot be met by the Responsible, Accountable, and Consulted of a change, the expectation is that the parties meet beyond the stated process and try to resolve any outstanding issues.
- **Data Integration:** May be a minor/major change depending on the scope of the change requested. Responsible party begins communicating the change request and necessary tasks. Final approval subject to data review process as facilitated by Application Owner.
- **Application Components or Platform/Infrastructure:** Considered a major change. Expectation is that the Responsible party begins communicating the change request and



necessary tasks. Feedback must collected by those Consulted on the change. Final approval subject to review process as facilitated by Application Owner.

### Change Conflict

If resolution cannot be met, then issue will be escalated to the appropriate leadership for resolution.

### Submitting a Change Request

All change requests shall be submitted via email to the EMCT team at:
**EMSA-Support@pdx.edu**

All change requests shall include the following details:

- the issue requiring attention or resolution;
- the requested action that the submitting unit or individual would like taken and;
- the requested outcome.

Additional documentation, details, or a meeting may be requested after initial submission to ensure that the requested changes are understood in full and that all outcomes are discussed and clearly articulated. If the change will require a significant investment of time, EMCT will work with the individual or unit to identify an appropriate timeline with regard to the scope, available resources, and impact of the change requested.

### Change Documentation

Documentation regarding system configuration and associated changes will be collected and maintained by the EMCT office.

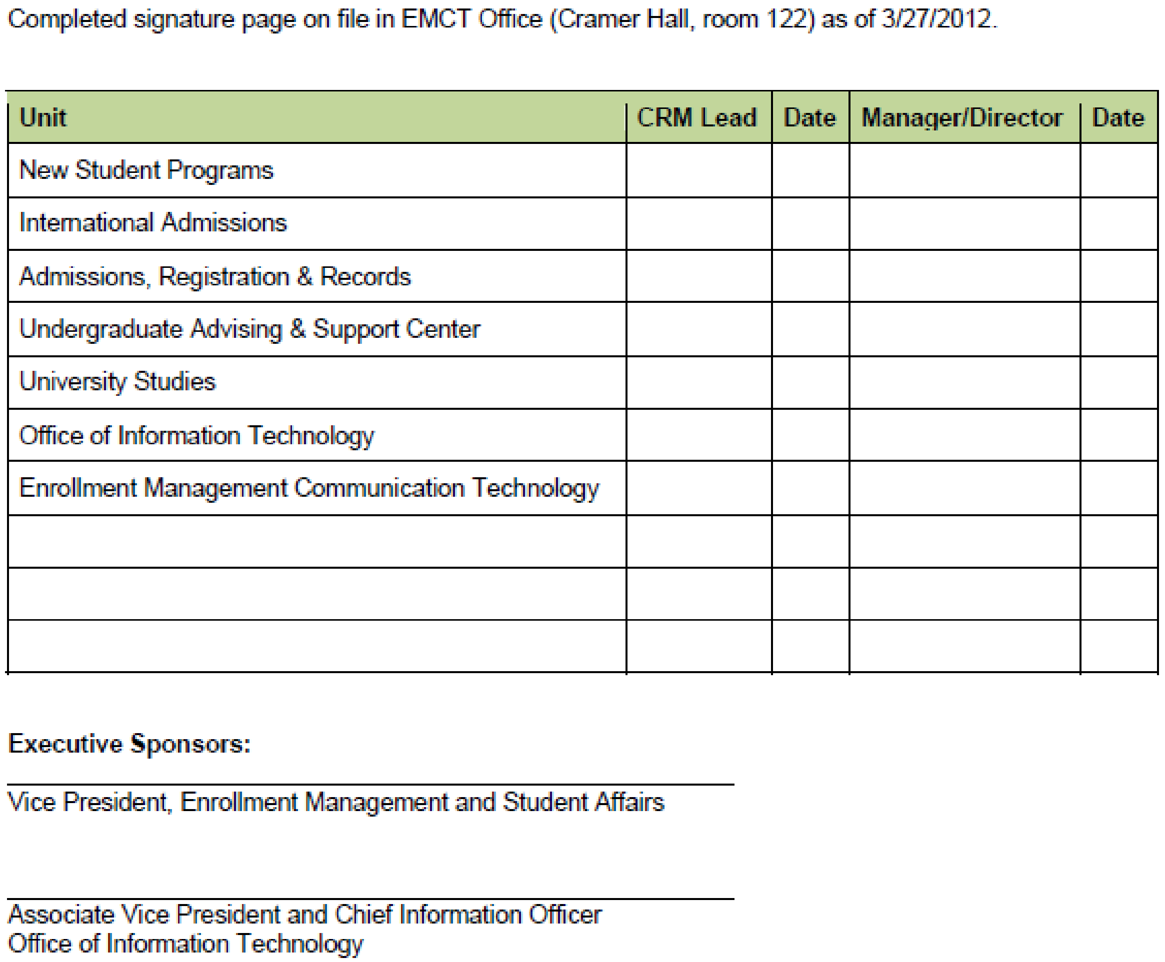
## V. Service Review and Auditing

- As new Business Units are brought on - Internal Application Audit
- Ongoing - Account provisioning audit - ensure FERPA compliance, introduction to Talisma tutorial completion (Application Owner)
- Ongoing - User Account Audit - to ensure inactive users are disabled (Application Owner)
- Yearly Business Unit review of Talisma use, how it is working, and any improvements requested (June)
- Annual discussion and review by Executive stake holders (March/April)

## VI. Signatures

Please enter the names of both the department director/manager and the unit CRM lead, if applicable, who have reviewed and approve of this agreement. Upon receipt of all relevant approvals, this MOU will be made available for all PSU Talisma CRM end-users for review and consultation via Google Documents.

# Tool #29: End User Memorandum of Understanding Builder (cont.)



Completed signature page on file in EMCT Office (Cramer Hall, room 122) as of 3/27/2012.

| Unit | CRM Lead | Date | Manager/Director | Date |
|---|---|---|---|---|
| New Student Programs | | | | |
| International Admissions | | | | |
| Admissions, Registration & Records | | | | |
| Undergraduate Advising & Support Center | | | | |
| University Studies | | | | |
| Office of Information Technology | | | | |
| Enrollment Management Communication Technology | | | | |
| | | | | |
| | | | | |
| | | | | |

**Executive Sponsors:**

Vice President, Enrollment Management and Student Affairs

Associate Vice President and Chief Information Officer
Office of Information Technology

# Tool #30: Lessons from Industry Discussion Guide

CRM has been a force in industries like banking, insurance, and commerce for over a decade, earning itself a mixed track record of success. Even though history provides us with important lessons regarding CRM, many implementations go awry when those lessons are not heeded. The Lessons from Industry Discussion Guide summarizes the most common CRM risk points, provides case studies of infamous CRM failures, and lays out discussion questions for staff to consider. The tool is best used to guide conversation among small groups of staff members who will be involved in the CRM planning and implementation process. This can be done in two ways. The tool can be used by select CRM leaders in conjunction with Tool #28: CRM Risk Point Map, which discusses CRM risk points, in hopes of catalyzing a deep discussion of how to learn from industry and avoid CRM pitfalls. Alternatively, the tool can be used alone to spark a broader discussion among the entire implementation team helping to get everyone on the same page and move implementation in a healthy direction. This route may be more appropriate for a larger core implementation team.

## Summary of Most Common CRM Risk Points

For more explanation of these risk points, see Tool #28 CRM Risk Point Map

Planning

**Poor Objective Setting**

- Failing to Align Initiative with Strategy
- Failing to Anchor Initiative

**Inadequate Planning and Scoping**

- Attempting “Big Bang” Implementation
- Failing to Fully Address Business Processes
- Allowing Internal Structures and Politics to Impact Customer Experience

Leadership

**Lack of Senior Leadership**

- Leaders Fail to Engage
- Leaders Disengage before Completion

**Lack of Change Management**

Implementation

**Implementation Missteps**

- Improperly Staffed Teams
- Falling into Technology Traps

**Inadequate Post-Implementation Operations**

## Starting the Discussion

Use the questions below after reading a case study to catalyze a conversation about commonly encountered obstacles to successful CRM implementation and how best to avoid them.

1. What significant errors do you think contributed to CRM failure?
2. Can any of these failures be sourced back to the above-listed risk points?
3. Why do you think the fatal errors were made?
4. How could those errors have been avoided?

# Tool #30: Lessons from Industry Discussion Guide (cont.)

**Case Study # 1: GMACCM Doesn't Think Things Through**

Since its founding in 1994, General Motors Acceptance Corp Commercial Mortgage (GMACCM) has become a leader in business real-estate loans with a mortgage portfolio totaling more than $151 billion. State-of-the-art technology systems have allowed GMACCM to quickly build business without significant increases in staff, keeping costs per loan service well below the industry average. In the past, adoption of the latest technology had given GMACCM the competitive advantage. However, GMACCM's 1999 Customer Relationship Management implementation created more problems than solutions.

When GMACCM began its own CRM initiative in 1999, their goals were to increase automation, efficiency, and the amount of borrower information available to call-center staff. Unfortunately, the goals of the users were never explored. In fact, the consultants failed to define who the users of the system would be. Given the complexity of GMACCM's customer base, skipping this first step of design methodology proved to be quite a costly mistake. PricewaterhouseCoopers' consultants commissioned for the project decided to meet business needs by installing an automated voice-response system. Customers seeking loan information were expected to call an 800 number and use the phone keypad to enter their account number. If the customer needed to speak with a service representative, the system assumed the user would know which department to request. Unfortunately, the consultants never verified that the existing structure of GMACCM's customer support area conformed to the user's mental model.

Implementing a CRM solution without clearly defining the characteristics, needs, and goals of the intended user resulted in customer attrition, wasted financial resources, and lost opportunities. According to Mike Lipson, an executive vice president of GMACCM, "When we fired it up, we found that 99% of our customers – literally – were hitting zero so they could talk directly to a live operator. While a customer might be willing to punch through a whole bunch of numbers, like for an American Express Gold Card, when he was calling about a commercial loan, he wasn't willing to do the same." Customers were clearly furious with the new system. Lipson went on to say that internal loan officers complained of losing deals because of the poor service provided.

Though GMACCM representatives declined to comment on the cost of the system, author Dale Buss notes that many CRM implementations involve seven-figure investments. However, the cost of implementation barely scratches at the surface of the losses likely suffered by GMACCM. To truly assess the damage, one would have to quantify the costs of losing frustrated customers and employees, persuading customers to return, rebuilding trust, and replacing the failed system. Furthermore, it's difficult to quantify is the cost of opportunities lost while the system was being developed, implemented, and replaced.

Source: http://shrike.depaul.edu/~jbuttime/docs/UseCaseStudy.pdf

### Case Study #2: CIGNA Healthcare Expects Overnight Change from CRM

In January 2002, Philadelphia-based CIGNA HealthCare migrated 3.5 million of its members to new claims processing and customer service processes and systems. The broad-based $1 billion initiative included CRM and an overhaul of its legacy technology infrastructure. Benefits did not materialize as planned and resulting impacts on customer service caused the nation's fourth largest insurer to lose six percent of its healthcare membership in 2002.

CIGNA wanted integrated processes and systems for enrollment, eligibility, and claims processing so that customers would get one bill, medical claims could be processed faster and more efficiently, and customer service reps would have a single unified view of members. This meant consolidating complex back-end processes and systems for claims processing and billing and integrating them with new CRM applications on the front-end. The project required complex technical work and an overhaul of the way business processes work together between front and back office as well as an overhaul of customer service staffing levels and skills. In addition, new processes and applications were designed to allow members to self serve: enroll, check the status of their claims and benefits, and choose from different health-plan offerings—all online.

At first, CIGNA conducted small scale migrations, moving its members in small groups of approximately 10,000 people at a time. During this time, problems were limited and manageable. At the same time, the customer service areas were being revamped in anticipation of the new systems. Huge gains in claims processing and customer service efficiency were expected, and the company started laying off reps as part of a consolidation of service centers. In 2002, the company terminated 3,100 employees and spent $33 million in severance payments. CIGNA also invested $32 million in the new regional service centers. At this point, in January 2002, with members renewing and new members lining up, the company performed a mass migration to the new infrastructure. Serious problems emerged immediately. Members had trouble obtaining, confirming, and inquiring about coverage. Employees at one member company effectively lost coverage due to membership data problems. Member ID cards were issued with incorrect numbers and prescription icons. Some people could not get their prescriptions filled at drugstores. As a result, a flurry of inquiries put CIGNA's new customer service operation to the test. But lower staff levels left the centers short-handed. Customers who phoned were put on hold, and when they did get through, some of the new reps struggled to navigate the new systems.

In addition, data from back-end systems did not show up properly in the customer service systems, making it difficult for reps to fully understand the customers' situation. In the rush to go live, the system's ability to handle claims and service from front to back and in large volumes was not adequately tested. Problems in one area cascaded into others; staffing levels were inadequate, and staff were inadequately prepared. Rather than realize that benefits would come over time as the company became used to new processes and systems, they expected them the day the switches were flipped.

Source: http://media.techtarget.com/searchCRM/downloads/CRMUnpluggedch2.pdf

**Case Study #3: CRM Gives Hershey's a Halloween Scare**

Candy producers record 40 percent of their annual sales between October and December. Halloween, the biggest candy-consuming holiday, accounts for about $2 billion in sales. For a candy producer, missing Halloween is like a toy company missing Christmas. Unfortunately, in 1999, that's just what happened to Hershey, the nation's largest candy maker. Just before the big candy season, shelves at warehouses and retailers lay empty of treats such as Hershey bars, Reese's Peanut Butter Cups, Kisses, Kit-Kats, and Rolos. Though inventory was plentiful, orders had not arrived and distributors could not fully supply their retailers. Hershey announced in September that it would miss its third-quarter earnings forecasts due to problems with new customer order and delivery systems that had been recently rolled out.

The new enterprise resource planning (ERP) and CRM processes and technology implemented earlier in the year had affected Hershey's ability to take orders and deliver product. The $112 million system aimed to modernize business practices and provide front-to-back automation from order-taking to truck-loading, but Hershey lost market share as problems allowed rivals to benefit during the season. Mars and Nestlé both reported unusual spurts of late orders as the Halloween season grew nearer. The most frustrating aspect of the situation is that Hershey had plenty of candy on hand to fill all its orders. It just couldn't deliver the orders to customers. By December 1999, the company announced it would miss already lowered earnings targets. It stated that lower demand in the last few months of the year was in part a consequence of the earlier fulfillment and service issues.

Hershey embarked on the project in 1996 to better coordinate deliveries with its retailers, to keep its inventory costs under control. The company also needed to address Y2K problems with its legacy systems. CRM, ERP, and supply chain management systems were implemented, along with 5,000 personal computers and a complex network of servers. The intention was to integrate these software and hardware components in order to let the 1,200-person sales force shepherd orders step-by-step through the distribution process. Sales staff could also better coordinate with other departments to handle every issue from order placement to final delivery. The system was also designed to help Hershey measure promotional campaigns and set prices, plus help run the company's accounting operations, track ingredients, and schedule production and truck loading.

Hershey realized that the business process changes involved with such a transformation were highly intricate. However, despite the size and complexity of the undertaking, the firm decided on an aggressive implementation plan that entailed a large piece of the new infrastructure going live at the  all at once. Unfortunately, the project ran behind schedule and wasn't ready until July 1999 when the Halloween orders had already begun to come in. Problems in getting customer orders into the system and transmitting the correct details of those orders to warehouses for shipping began immediately. By August, the company was 15 days behind in filling orders, and in September, order turnaround time was twice as long as usual. In recent years, Hershey sales growth had exceeded its rivals, and the company was expecting 4 to 6 percent growth that year. However, sales instead slipped and the company admitted that problems with the new system alone had reduced sales by $100 million during the period.

Source: http://media.techtarget.com/searchCRM/downloads/CRMUnpluggedch2.pdf

# Tool #31: CRM Leadership Structure Guide

Knowing which staff members to include in the preparation for CRM is a complex question that many struggle to answer. Poorly staffed projects are more prone to falter at every step along the road to implementation from poorly defined scope, to lackluster end-user buy-in, to reporting on outcomes.

The CRM Leadership Structure Guide[6] describes the important individual roles that must be filled and groups that must be assembled to steward a healthy project through to completion. Though most units probably do not have the resources to staff their implementation with every position described below, they should ensure that all functional capacities are filled; one person can fill multiple roles.

### Executive Sponsor

Description: Senior executive, typically the dean or equivalent of the COE unit who is ultimately accountable for the success of the CRM program within the organization. The executive sponsor's frequent, vocal, enthusiastic focus on CRM will communicate to the entire organization that CRM is a part of its "DNA" and that each employee needs to make sure it is given priority. In addition to this evangelism, the executive needs to hold each layer of management accountable for the success of CRM in their departments.

Responsibilities:

- Securing necessary funding for CRM program
- Setting expectations for accountability and downstream reporting
- Setting and maintaining an enthusiastic and supportive tone for the project

Important Qualifications:

- Must be a CRM "believer." This individual's tone, engagement level, and enthusiasm all have an outsized influence on the CRM program.

### CRM Program Lead

Description: overall project manager and orchestrator for the CRM program, typically a marketing director or leader. This individual manages the planning, regular maintenance, and enhancement processes and is the most active actor along the path to CRM implementation.

Responsibilities:

- Setting goals for the CRM program
- Being the ultimate decision maker for CRM questions within the organization
- Developing the CRM roadmap
- Creating maintenance and enhancement plans

Important Qualifications:

- Strong project management skills
- Understanding of customer-facing part of the organization and empathy for customer-facing employees
- Ability to communicate comfortably at the executive level
- Experience with managing technology systems, vendors, and software developers

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[6] Adapted from: Kostojohn, Scott, Mathew Johnson, and Brian Paulen. "Components of CRM Success." *CRM Fundamentals*. [Berkeley, Calif.]: Apress, 2011.

# Tool #31: CRM Leadership Structure Guide (cont.)

### Steering Committee

Description: The critical body for guiding the CRM program within the organization.

Important Voices to Include:

1. CRM Program Lead
2. Departmental Champions (representative from all key CRM constituent groups like marketing, recruiting, program administrators, etc.)
3. Representative from IT (less important for a SaaS CRM deployment)
4. Representative from Administration Team (see below)

Responsibilities:

- Managing the ongoing change control process for production CRM applications. This is the formal evaluation and approval process for configuration changes to the CRM application, used once CRM is in production to ensure that proposed changes do not interfere with any group's usage of CRM and that they are aligned with the overall CRM roadmap and to communicate these changes to the various CRM constituencies.
- Developing and maintaining the CRM roadmap for the organization. The roadmap describes the plan for enhancing the CRM program over time and how these enhancements support the organization's strategic goals. The roadmap may describe new capabilities to be added to CRM, new user groups to be migrated to the application, or new business processes to be implemented and supported with CRM.

Important Qualifications for members:

- Can accurately represent the needs of their constituency to the committee
- Can understand how changes to the CRM program will impact their constituency

### CRM Vendor Selection Team

Description: The team that will lead the search for a CRM vendor partner.

Responsibilities:

- Assemble a vendor selection scorecard in light of specific CRM needs (see Tools #21: Guide to Understanding Your CRM Needs and #26: Vendor Selection Scorecard for more guidance)
- Assemble the RFP if one is mandated by organizational procurement policies
- Attend vendor meetings and demos
- Check vendor references and make a selection

Important Voices to Include:

1. CRM Program Lead: knows what CRM features are important given specific CRM goals
2. IT Representative: ensures integration and other technology pieces
3. Business Analyst: ensures reporting needs are met

# Tool #31: CRM Leadership Structure Guide (cont.)

**Implementation Team**

Description: The group charged with the initial rollout of the CRM program.

Responsibilities:

- Designing an implementation rollout plan
- Ensuring that each user group has an adequately staffed trainer and champion
- Deploying the implementation plan and monitoring for flagging user groups
- Maintaining enthusiasm for implementation by sending reminders, success stories, updates

Key Roles (one individual may play multiple roles):

1. Executive Sponsor: Will want to stay current on the status and progress of the project and assist the implementation team by clearing bureaucratic obstacles and encouraging engagement across the organization.
2. Program Lead: Plans the project, keeps it on schedule, and maintains communication throughout.
3. Subject-Matter Experts: Individuals on the team with a deep understanding of the business area that will be impacted by CRM and will help guide the process design and CRM application design to meet the project goals. It is important that the SMEs understand the situation “on the ground” today (what are the current processes and what tools are being used) as well as the larger pictures—the longer-term organizational vision for CRM in their area and the immediate project goals that help achieve the vision.
4. IT Representative: Responsibilities may include: procuring and maintaining server hardware, initiating integration of other systems with the CRM, updating client machines, assisting the consulting team with network and server access, and potentially doing some development and testing work. For on-premises deployments, the IT representative will also be responsible for disaster recovery planning and application backup.
5. User Trainers: Communicate to users how their work processes are changing as part of the project and how new technology tools should be used to support these processes. Often SMEs end up playing the role of trainer for their groups.
6. Departmental Champions: Point people within each group of employees impacted by CRM. Typically they have received additional training and potentially have been involved in the design process and are charged with helping drive the success and adoption of the CRM process and tools in their groups. Champions act as first-line user support for the CRM application and for the CRM-related process and as the eyes and ears of the CRM implementation team post-launch to spot friction points and issues. They also have a key role to play in “evangelizing” the new processes and tools.
7. Consulting Partner Team: If a consulting partner has been engaged to assist you, their project lead and consultants will have key roles to play during the implementation. Typically their work hand-in-hand with the Program Lead to manage the project.

# Tool #31: CRM Leadership Structure Guide (cont.)

## CRM Administration Team

Description: Team in charge of ongoing, regular maintenance and improvement of the CRM program.

Responsibilities:

- Providing end-user support for the CRM application. Sometimes there is a centralized help desk within the IT department that may provide basic, “tier-one” support, but even in these situations, the CRM administration team has a support role to play as an escalation point for more complex issues.
- Maintaining the health of the CRM application. Again, depending on the role of IT, some tasks may be handled outside of the CRM administration team, but they include applying software updates to the CRM application and the underlying operating system and database software, ensuring that the application is being backed up regularly both on-site and off-site, and preparing and practicing for disaster recovery. These tasks are not needed if the CRM is an SaaS deployment.
- Identifying, planning, and implementing enhancements to the CRM process and application

Roles (some may be held by members of the IT department. If not, there should be some representation from the IT department, even if it is simply as a “virtual” team member who is kept in the loop):

1. CRM Program Lead: description above
2. CRM Business Analyst: combines three strands of understanding to help define a future state in which the organization is more effective and achieving its business goals. The first understanding is how employees work today, the second is what the organization’s CRM goals are, and the third is a deep understanding of how the CRM application can be configured and customized. Combining these, the business analyst can outline how a given work process and the supporting CRM application can be modified to make the organization more successful.  Key skills include:
    - Experience with process design/reengineering
    - Experience with requirements gathering for technology systems
    - Experience developing functional specifications for software applications
    - Deep understanding of and experience with your chosen CRM application
    - Deep understanding of the business processes supporting by the CRM application
3. CRM Administrator: Central figure in maintaining and modifying the CRM application. This individual handles user support issues, maintains the application health, handles user management, and makes configuration changes as needed.

# Tool #32: Profile of a CRM Rotation Program

Rotation programs were originally pioneered by large corporations looking to train engineers are now used by all types of business, the federal government, even a handful of universities. Under the concept, employees cycle through a variety of positions spending several weeks or months in each. They can be particularly useful for exposing back-end employees, who rarely engage in customer interaction to front-line realities and therefore don't hold these issues in mind when doing their work. This, contacts explain, happens all too often and undermines the success of CRM implementation. With the experience of front-line customer service in mind, employees are better able to internalize customer support philosophies and engineer processes that better facilitate support functions.

The University of Houston's Educational Technology and University Outreach unit, dedicated to supporting nontraditional and online education, implemented a version of a rotation program to strengthen their call center function by making employees more empathetic to both prospects' questions and to call center efforts to address those queries. Staff who otherwise would never have had to work with prospects were assigned a day to staff the phones. The profile below further explains how they structured the initiative and also provides discussion questions for participants to consider post-rotation.

## Rotation Program at the University of Houston

### Structure and Logistics

**Rotation Calendar***

| Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|
| Program Manager 1 | Student Worker 1 | Program Manager 2 | Director | Coordinator |
| **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** |
| Student Worker 2 | Program Director | Program Manager 1 | Student Worker 1 | Program Manager 2 |

↑ Cycle begins again

* Being on rotation typically occupies 20-30% of a staffer's day

**Responsibilities**

On their assigned days, communication staffers are responsible for:

- Answering the prospect inquiry phone line
- Managing any instant chats that pop up
- Working extended hours (8:30am-6:30pm)

Communications staffers are **not responsible** for responding to email. The CRM will continue to automatically route emails to the appropriate point of contact (typically a program director, as emails tend to be program-specific).

# Tool #32: Profile of a CRM Rotation Program (cont.)

## Structure and Logistics (Cont'd)

### Contingencies

- Student workers serve as a second-line should the dedicated staffer be pulled away from the phone/chat window for a legitimate reason.
- Program coordinators, all of whom carry a heavy advising load, are not included in the formal rotation schedule. However, they often staff the lines when they are available as it is their comfort zone.

## Rules

Rotation participants receive the following guidelines to enforce the unit's customer service philosophy which stresses approachability and helpfulness.

- **Say What You Know.** Build off your experience with the institution to have a more enriching conversation. Don't deviate from what you know to be true, however.
- **Admit What You Don't Know.** Earn approachability and trust by admitting when you don't have the answer. Just make sure to track the answer down and deliver it to the caller.
- **Never Speculate.** If you don't know something, find a colleague who does and get the information from him/her (see below).
- **Be Honest.** Don't give a caller an easy answer over a complicated reality.
- **Never Send A Caller Somewhere Else.**
  - Never instruct a caller to read the website—read it for him/her
  - Never re-direct a caller to another colleague—ask that individual yourself
- **Listen To Your Caller.** People call when they have specific needs. Staff should identify and keep in mind those needs while also proactively anticipating further needs.
- **Drive Your Caller to a Conversation with an Advisor.** This is the next step advocated in all communications collateral and the next step in nurturing a qualified lead.

## Lessons Learned (Representative)

**Insight into difficulty sparks innovation**

When one rotation participant realized how frustrating it was not to have the answers to callers' questions, he started making tip sheets that are widely used today.

**Fast and efficient internal knowledge sharing is key**

No tip sheet has all the answers, so some participants proposed using an instant chat system internally to get quick answers from "experts" like program directors.

**We can improve our website with this intel**

Observed trends in callers' questions led to additions and improvements to the website.

# Tool #32: Profile of a CRM Rotation Program (cont.)

## Adapting the Rotation Program at Your Institution

### Implementation Options

While the University of Houston uses its rotation program year-round as a regular part of its call center staffing model, for many institutions this may not be viable.  However, other options allow staff to experience frontline realities without significantly disrupting their regular workload and compromising call center quality.

Option 1: Cameo Appearance

Staff members spend one day each on the phone lines. This option is obviously more time efficient, though contacts warn that learning is limited when the frontline experience is a one-time variation from the norm.

Option 2: Recurring Guest Star (recommended)

Staff members go through multiple rotations (contacts recommend 3+). Discussion activities are scheduled after each experience and after the program is complete.

### Discussion Questions

Use the questions below to prompt a discussion among a small group of staff who participated in the rotation program or as the questions in an exit interview (person-to-person or in worksheet form) to the experience:

1. Was anything about the experience surprising (e.g., questions asked, questions not asked, etc.)?
2. What was frustrating about the experience?
3. What was enjoyable about the experience?
4. What could make the experience easier for one-the-phone staff and more enriching for callers?
5. Did you notice any trends in what callers were asking?
6. What one improvement would you make to the call-management process?

# Tool #33: CRM Training Curriculum Outline

The growing pains of a major change to office technology and staff workflows associated with CRM implementation can be mitigated with a well-executed training. The CRM Training Curriculum[7] outline is meant to give a brief overview of key points to teach to staff during the implementation process. It is not intended to be an exhaustive curriculum, but rather a baseline menu of concepts to consider as a foundation for the specific training developed for your staff.

**Implementation Note:** To be sure the training is most useful to each staff member, consider their roles and map the curriculum below to their needs. Some might need all the information while others will only interact with the system in limited capacities. In between sessions, to help the training stick, consider using brief "homework" assignments to encourage staff to test the system on their own so concepts will stick after the training. Ccontacts recommend splitting the training into small increments over a week or more to allow staff the time to acclimate themselves.

## Overview of CRM Implementation

- **Why the COE unit is adopting a CRM**
  - Specific problems it seeks to solve
  - Specific goals it will help the unit achieve
- **The Selected Vendor and Why It is the Best Option**
  - Advantages
    - Key opportunity to sell CRM as a "problem solver" for diverse areas of the staff
    - Show screen shots or conduct access in a computer lab to allow the staff to see the system during the training
  - Disadvantages
    - It is important to spell out the limitations (as far as you know) so that the implementation process does not appear to be full of empty promises
- **Introducing the Super User**
  - If a CRM "Super User" is already on staff, it's helpful to introduce this person as an expert on the system and a "go-to" for questions and concerns
- **The Implementation Timeline and What to Expect**
  - How should staff manage data during the transition?
  - When and how will data be transferred from the existing system to the new system?
  - When will the implementation be complete?
  - How will our business processes change, if at all?
  - Committee/body/leader that will monitor implementation and manage maintenance
  - How to make suggestions
- **Questions/Discussion'**

## System Basics

- **Create/Distribute User Identification and Log In Information**
  - Explain how users will access the CRM and any remote access capabilities
- **Portal Mapping**
  - Employee Portal
  - Student Portal

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[7] This curriculum was adapted from the E-council.org CRM Course Outline. For a comprehensive list of topics covered in the E-council.org CRM Course, see: http://www.eccouncil.org/courses/professional_series/crm_course_outline.aspx

# Tool #33: CRM Training Curriculum Outline (cont.)

    - Partner Portal
- **Map Institutional User Base**
    - Show map of users within the institution, if possible connecting some users as liaisons to important units/departments who do not have users but whose information is important for the CRM to track
- **Explanation of Task Assignment and Completion (if applicable)**
    - Explain how daily/weekly (or other routine) tasks will be assigned, retrieved, and noted as complete inside the CRM
    - Explain staff performance reporting through CRM (as it is applicable to staff within your purview)
- **Questions/Discussion**

## The Student Experience and the CRM

- **Concept of the Student Life Cycle**
    - Student Life Cycle Stages
- **Student Lifetime Value**
    - Maximizing lifetime value of a student
    - Student value management
- **Managing Student Life Cycle in new CRM System**
    - Responsibilities of each staff member along the life cycle

## Mapping COE Business Processes to CRM Activities

- **Contact, Opportunity, and Ticket Management Overview**
- **Lead Generation**
- **Prospect Engagement (Communications Plan)**
- **Campaign Management**
- **Questions/Discussion**

## Mapping the COE Analytics and Metrics to CRM Activities

- **Analytics & Customer Life Cycle Management**
    - **Running reports on marketing spend**
        - How to run a report and/or how to request a new report be created
        - Types of reports (e.g., marketing spend, success of leads source, etc.)
    - **Running reports on enrollment pipeline**
        - How to run a report and/or how to request a new report be created
        - Where do most prospects fall in the pipeline?
        - What prospective student actions have moved most prospects to a new pipeline stage?
    - **Running reports on applicant conversions**
        - Extracting applicant data from SIS
        - Transferring applicant data to CRM
        - Performing search for duplicates
        - Reporting on applicant conversion level
- **CRM Intelligence Management Cycle**
    - Routine audits for data management
    - Exporting and interaction with other databases on campus

# Tool #34: Sample CRM Specialist Position Descriptions

These sample job descriptions are derived from job postings listed on publically available institution websites; the origin of each posting is referenced in the footnotes of this tool. Sample position descriptions in this tool include:

1. Salesforce Administrator, Office of Recruitment, College of Business
2. CRM System Specialist, Adult-Serving University
3. CRM Specialist, Self-Supporting Continuing Education Unit
4. CRM Marketing Specialist, Adult-Serving University

The positions highlighted in this tool are most applicable for institutions pursuing a more tailored rather than off-the-shelf CRM implementation (for more information about the variety of roles involved in different implementation types, see Tool #28: CRM Resource Intensity Comparison Chart. Positions 1 and 2 are most closely related to the technical role *systems analyst, data base administrator,* or some combination thereof. Positions 3 and 4 are most closely related to the generalist role *process expert*, specifically in marketing.

## 1. Salesforce Administrator, Recruitment Office, College of Business[8]

### Position Description

“Reporting to the Director of Recruitment, the Salesforce Administrator is responsible for implementing Salesforce.com technology and software as the recruitment, alumni and corporate training client relationship management (CRM) solution for the College.

The incumbent plays a business analysis, project management and operational role in customizing and administering Salesforce.com and related AppExchange components with the express purpose of delivering on the goals and objective detailed in the College’s Recruitment Plan, and Advancement business plans.

Leveraging strong business analysis and project management, research and technical skills, the incumbent will be the author of the process for the future use of the CRM, under the direction of the Director. The incumbent will conduct research, develop and implement the training manuals and develop best practices which will serve as the benchmarks in the administration of the new CRM. Provide orientation and training to end users on the use of the CRM. The incumbent serves as a technical advisor for staff looking to take advantage of the power of the Salesforce platform.”

**Administration (50%)**

- “Administer Student Recruitment, Alumni and Corporate Training databases, implemented on the Salesforce.com platform, for all users.
- Understand the functionality of Marketo, a marketing and sales automation software and other added applications.
- Perform administration of the college’s multiple Salesforce.com instances
- Provide Salesforce (SF) accounts, create user profiles and recommend security settings or other requirements to all system users.
- Regularly perform database de-duping and cleanup procedures.
- Administer ongoing support and administrative requests of users.
- Develop reports, dashboards, and processes to continuously monitor data quality and integrity.”

**Training and Documentation (15%)**

- “Develop training plans, materials, and documentation for Algonquin Salesforce users, keep materials up-to-date, coordinate and deliver new user and ongoing training sessions across the College.
- Develop and communicate a schedule for future database releases/enhancements.
- Monitor user adoption rates and respond as needed (additional training sessions, communication, modifications, or other resources) to improve.
- Assist users with report and dashboard design and management.”

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[8] Salesforce Administrator User Group: “HigherEd Cloud”

## 1. Salesforce Administrator, Recruitment Office, College of Business (Cont.)[9]

**Planning (10%)**

- "Define, document, communicate, and administer a change management (release) process to develop and implement new applications and updates to existing applications.
- Work with consultants and internal staff to integrate existing information system data within Salesforce."

**Process Discover and Management (10%)**

- "Work with various functions and end users to identify, document, and communicate standard business processes as they related to the database.
- Develop and maintain data dictionary and report description documents detailing the organizational structure of the Algonquin College Salesforce instance.
- Work with management to identify new and creative opportunities to leverage the database to support additional business processes or functions."

**Platform Integration (5%)**
"Work with ITS, Web services, Registrar's Office, and Marketing, and others to integrate web and online initiatives into the database."

**Vendor Management (5%)**
"Administer outsources Salesforce.com implementation partners as required.
Maintain ongoing relationship with Salesforce.com and the Salesforce.com Foundation."

**Other Responsibilities as Defined by the Director (5%)**
"Conducts best practices research."

### Qualifications

- "Two-year diploma
- Five years of experience in a marketing, sales or related field. Minimum 3 years experience in project management, database management and Salesforce CRM. Experience in documenting CRM policies & procedures. Post-secondary experience preferred.
- Salesforce Administrative Essentials
- Marketo Fundamentals (preferable)
- Project Management Basics
- Advanced Microsoft Excel"

## 2. CRM System Specialist, Adult-Serving University[10]

### Responsibilities

"Under the direction of the Director of Information Systems, and working collaboratively with the CRM Marketing Manager, this position will be responsible for the analysis, modification, and maintenance of application programs, databases and software solutions including Hobsons Connect CRM or other systems to meet user and organizational information, interface and reporting needs. Position will be responsible for research and analysis of data using multiple platforms to provide statistical information, reports and work flow configurations, along with other technical configuration work as directed. Position will be responsible for revising workflow, enhancing database architecture and providing technical project management when incorporating additional business processes into the CRM framework. Position uses familiarity with data, reporting and work flow tools to formulate solutions to procedural and

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[9] Salesforce Administrator User Group: "HigherEd Cloud"
[10] Brandman University, http://web.brandman.edu/jobs/details.aspx?job=12-132

business operational challenges. Assists and makes recommendations towards maintaining effective data quality controls, reporting and work flow efficiency."

- **Overall Project Management:** "Assume a key role in the use of Hobsons Connect CRM and other related software, and build and test efficient reports and workflows."
- **Customization of Platform for User Needs**: "Develop, design and research solutions for users through regular consultations to identify and document their respective CRM software/systems needs, work flow issues and reporting output needs."
- **Customer Service Ethic: "**Consistently seek ways to improve services through use of technology.
- Work with university functional departments, consultants and partners to enhance and maintain computer work flows that ensure high quality information in support of CRM business functions."
- **Data Management: "**Develop, maintain, and enhance data quality control reports and electronic monitoring as needed to maintain or improve efficiency."
- **Data Management: "**Troubleshoot system "bugs" and problems with reporting or work flows."
- **Communication Plan Development**: "Assist users with Communication Management functions such as analyzing office, staff, and student needs for information, developing the flow of letters, e-mails and other forms of notification, and running the necessary processes/functions to produce accurate communications."
- **Communication Plan Development**: "Review and edit communication management request definitions, improving and implementing document requests, work flows and processes as needed."
- **Platform Integration: "**Participate in software integration meetings with staff from other functional departments, consultants and partners. Integrate and coordinate testing plans with various system users."
- **Tracking and Analysis: "**Develop, implement, and maintain internal and external reports. These reports may be routine and used by numerous higher education publications or may be special, one time reports."
- **General Communication: "**Provide requested data in report format to internal clients or other requestors as appropriate."
- **Marketing Strategy Setting: "**Report new findings and recommend process improvements."
- **Training: "**Maintain documentation of all CRM application, report and work flow procedures."

### Qualifications

- Previous Experience: "2-3 years experience working with CRM data reporting or related processes"
- Education: "Bachelor's degree in the field of computer technology or adequate equivalent experience"
- Skills/Knowledge:
    - "Familiarity with Microsoft Office Suite, Argos report writing, Hobsons Connect or other CRM tools, Banner/Sungard systems is desired
    - Formal data flow analysis methodologies

## 2. CRM System Specialist, Adult-Serving University (Continued)[11]

### Qualifications (Continued)

- Campus-defined systems, applications and standards
- System/equipment capability, design restrictions and security requirements
- Integrated systems including operations systems, applications and databases
- Technical and vendor documentation for database systems and related programs
- Data structure design, relational database design and file structures
- Ability to identify hardware/software problems

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[11] Brandman University, http://web.brandman.edu/jobs/details.aspx?job=12-132

# Tool #34: Sample CRM Specialist Position Descriptions (cont.)

- Ability to maintain current knowledge of program requirements, regulations and restrictions
- Ability to gather and analyze data, reason logically, draw valid conclusions and make appropriate concise information and recommendations available in both oral and written forms
- Ability to exercise sound independent judgment
- Intermediate level of knowledge of Microsoft Office tools particularly Word, Excel, and Outlook
- Understanding of data relationships, how data is input (manually and electronically), and how the data is reported
- Knowledge of the logic of computer applications and demonstrated ability to apply this knowledge to solve routine, extraordinary, and complex office problems
- Writing skills to enable clear, concise correspondence and manuals
- Ability to prioritize duties when faced with interruptions, distractions, and fluctuating workload.
- Ability to keep information confidential
- Demonstrated adherence to the highest standards of professional and ethical conduct
- Self-starter with the ability to perceive tasks that needs to be accomplished and take appropriate steps to achieve success
- Knowledge of basic database reporting processes
- Ability to write sound and efficient SQL queries to produce desired reporting or process outcomes.
- Critical thinking ability to understand and transfer business processes into automated work flows, given work flow tools and required training”

## 3. CRM Specialist, Self-Supporting Continuing Education Unit[12]

“The CRM Analyst is responsible for analysis, customization and configuration of CRM forms and views, and the creation of custom entity configurations that extend CRM to meet business needs.”

### Responsibilities

**Data Analysis and Reporting**

- “Collect information to analyze and evaluate direct marketing (email and catalog) performance and assess effectiveness of marketing campaigns. Develop and distribute direct marketing reports and analytics.
- Analyze campaign results and lead behavior, communicating findings to cross functional teams.
- Create standard and ad hoc reports on pipeline, won/lost, marketing activities, etc.”

**CRM Administration**

- “Manage contact information in the Dynamics CRM database, proactively monitoring accuracy, classification and processing of all prospects.
- Monitor Dynamics CRM system to ensure proper performance, streamline processes and increase usability for end users.
- Monitor and manage database migration and integration software (Sribe), troubleshoot and resolve import errors between various databases.
- Understand CRM integration with email service provider and act as backup for Email Marketing Communications Specialist.”

**CRM Liaison**

- “Act as liaison between Marketing and development team. Collaborate with users and development team to design, test and implement new Dynamics CRM features as well as troubleshoot and repair issues, and understand how multiple databases interact with Dynamics CRM (including Student Database and web).
- Provide user training, education and analytical support to UWEO organization on proper usage and increase acceptance and usability of Dynamics CRM throughout organization. “

### Qualifications

- “Experience using CRM to create routine and custom reports, and analyze marketing campaign performance and lead behavior.
- Bachelor’s degree in Information Management, Computer Science, Business Administration, Marketing, Information Systems or a related field
- Required Skills/Knowledge
    - Ability to think through and implement solutions in response to identified business needs
    - Strong analytic skills and problem solving skills combined with the ability to communicate findings to all levels of an organization.
    - Basic HTML skills
    - Experience with email marketing and proper mailing list management
    - Strong technical skills and database experience, including experience using Microsoft Office
    - Superb attention to detail and organizational skills
    - Ability to multitask
    - Excellent listening, interpersonal, and written and verbal communication skills
- Preferred Skills/Knowledge:
    - Experience training peers and writing training manuals
    - Preferred 2 years of hands-on experience managing a Customer Relationship Management (CRM) database, preferably Dynamics CRM
    - Experience coordinating and participating in end user testing
    - Basic SQL skills.”

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[12] Burning Glass Technologies Labor/Insight archived job advertisements

## 4. CRM Marketing Specialist, Adult-Serving University[13]

### Responsibilities

"The CRM Marketing Manager is responsible for overall management and implementation of all CRM marketing communication strategies and tactics delivered through the CRM system to drive student enrollment growth…

The CRM Marketing Manager will lead the development, execution and performance-tracking of segmented communication flows for both short- and long-term lead nurturing to motivate prospective students to move through every stage of the enrollment process."

- **Stakeholder Coordination: "**Work with internal and external partners to develop, implement, track and measure CRM marketing segmented communication strategies and tactics for prospective students."
- **Tracking and Analysis: "**Manage the overall performance and effectiveness of the program, including day-to-day management of the platform and website interface, and CRM targeted campaigns and projects. Develop ROI analyses, track, measure, and analyze key performance indicators. Synthesize multiple, disparate reporting sources, identify and implement new reports and dashboards via CRM system. Manage CRM project timelines."
- **Stakeholder Coordination: "**Review senior leadership's CRM vision periodically to ensure ongoing execution and future enhancements to segmented communications/content continue to deliver on this vision. Work specifically with campus and administration staff to identify and implement new CRM marketing strategies and tactics that will enable them to meet or exceed their enrollment goals."
- **Communication Plan/Segmentation Management**: "Develop comprehensive CRM management processes and segmented communication flows and web-based content segmentation for all prospective and enrolled students and alumni to move these segments through to conversion, retention, as well as referral and university advancement goals. Different CRM strategies will be developed according to explicit (region, academic program of interest, enrollment term, education history, etc.) and implicit/behavioral data, such as time on database, last action taken, website/email activity, etc."
- **Marketing Strategy Setting:**
  - **"**Identify CRM program opportunities, inquiry process improvements, and marketing-mix and channel shifts that drive incremental lead conversion and implement these opportunities/improvements."
  - "Analyze primary and secondary research, market conditions and competitive landscape to produce market assessments that identify CRM opportunities and innovative marketing ideas."
  - "Stay updated on CRM best practices and industry trends to identify innovative strategies and solutions that will drive growth in student enrollments."
- **Training/Management**: "Manage, coach and develop one direct report, Email Marketing Analyst.."

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[13] Brandman University, http://web.brandman.edu/jobs/details.aspx?job=11-099

## 4. CRM Marketing Specialist, Adult-Serving University (Continued)[14]

### Required Qualifications

- "Hands-on, mid-level manager with five years of experience in CRM program management
- 7-10 years of professional experience in marketing particularly in the areas of database/direct marketing, developing database segmentation strategies, segmented messaging/communications strategies, measurement and analytics.
- Undergraduate degree in Marketing, Business, or related field required
- Knowledge and aptitude working with website, database technologies and CRM systems. Must embrace innovative technologies for marketing purposes. Experience with online CRM, advertising and lead generation, website/mobile marketing technologies email, social media and experience with technical project management processes.

- Outstanding project and time management skills and ability to organize multiple and complex tasks that involve technology integration; experience working on multiple projects simultaneously under tight deadlines and with competing priorities.
- Strong analytical and critical thinking skills with a disciplined, well-informed approach to problem-solving and decision-making.
- Ability to quickly trouble-shoot any issues that arise and to effectively break through complex, ambiguous and opaque issues and undefined processes to define and recommend clear, well-supported and feasible solutions.
- Must be able to lead and manage cross-functional teams and communicate effectively with senior staff, faculty, other members of the campus community, as well as external service providers, vendors and agencies.
- Ability to work independently, be self-motivated, and results-oriented with a strong sense of accountability
- Outstanding marketing and business writing/editing skills.
- Must possess strong written and verbal communication skills and experience presenting in a compelling and persuasive manner to senior staff
- Team-building, partnering, and strong interpersonal skills
- Ability to focus and thrive in a highly dynamic and fast-paced work environment
- Advanced skills using Microsoft Office applications (Excel, Word, PowerPoint, Outlook)"

### Desired Qualifications

- "MBA degree strongly preferred
- Experience in marketing for an education institution
- Ability to write data queries, use database applications (e.g., Access) and querying/reporting tools
- Experience using Photoshop, GoLive, Acrobat, and Silverpop (or other email platform) a plus
- Familiarity with A/B and multi-variant testing"

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[14] Brandman University, http://web.brandman.edu/jobs/details.aspx?job=11-099

# Tool #35: Guide to CRM Specialist Selection

Launching a CRM is a complicated process that requires technical expertise in data management, stakeholder coordination and training, vendor relationship management, and ongoing analysis. Furthermore, CRM implementation requires integrating data systems, mapping business processes (e.g., staff tasks) to CRM functions, maintaining data integrity, customizing the platform for the needs of user groups, tracking CRM use, and drawing conclusions about marketing and communication efficacy based on data analytics. A CRM project owner must take on these disparate responsibilities, and although a project owner may be responsible for an additional job function (e.g., web content developer), the COE Forum recommends carefully considering which existing staff or newly hired employee is best equipped to assume the role of "CRM specialist."

This tool features a CRM specialist's core job responsibilities and candidate characteristics as described by advanced CRM institutions. The tool will help COE and broader university leaders identify the characteristics desired in a candidate. A dedicated CRM specialist, with minimal job functions beyond operationalizing CRM, is appropriate for institutions pursuing a "tailored" or "extended" CRM implementation, according to the definitions in Tool #28: CRM Resource Intensity Comparison Chart.

## Establishing a Reporting Structure for the CRM Leader

In an assessment of 14 CRM specialist position descriptions, including specialists working exclusively in COE units and those working university-wide, CRM specialists reported to one of the following departments: university marketing, COE unit marketing, university information technology, undergraduate admissions, or college/school-specific offices of recruitment. The advanced CRM institutions profiled in this tool advertised for CRM specialists serving varying scopes of the students and staff:

- COE Unit (one institution)
- Business school (three institutions)
- Undergraduate admissions (three institutions)
- University-wide, for traditional student population (4 institutions)
- University-wide, for adult student population (2 institutions, 3 positions)

Although, university-wide CRM implementations may be better resourced (and face challenges separate from those faced by COE units), there is still much to be learned from the job duties and reporting structures for these CRM specialists who serve the entire university. For example, all profiled job descriptions emphasize information technology, marketing expertise, or some combination thereof.

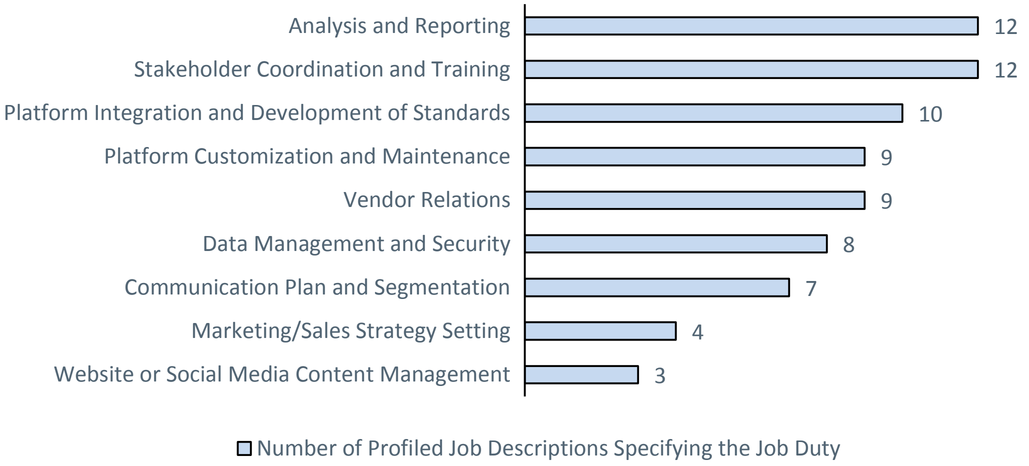
# Tool #35: Guide to CRM Specialist Selection (cont.)

## Core Job Functions across 13 Universities

Because a CRM specialist role can incorporate both data management and marketing or communication duties, the core job responsibilities vary. The graph below describes nine commonly cited responsibilities and their frequency in 14 job descriptions at 13 universities.

**Figure 2. Core Job Functions**

*n=14*



## Identifying Job Functions Important to You

Use the worksheet below when building a position description for a CRM manager.

### Position Description Builder Worksheet

1. Consider the job function described in Figure 2.
2. Identify the functions that a CRM specialist at your unit should fulfill. Ascribe a rough percentage of candidate time that each duty should consume. Use Tool #36, Sample CRM Specialist Position Descriptions, as a guide.
3. Complete the table below.

| Function | Percentage Time Consumed |
|---|---|
| | |
| | |
| | |
| | |
| | |
| | |

# Tool #35: Guide to CRM Specialist Selection (cont.)

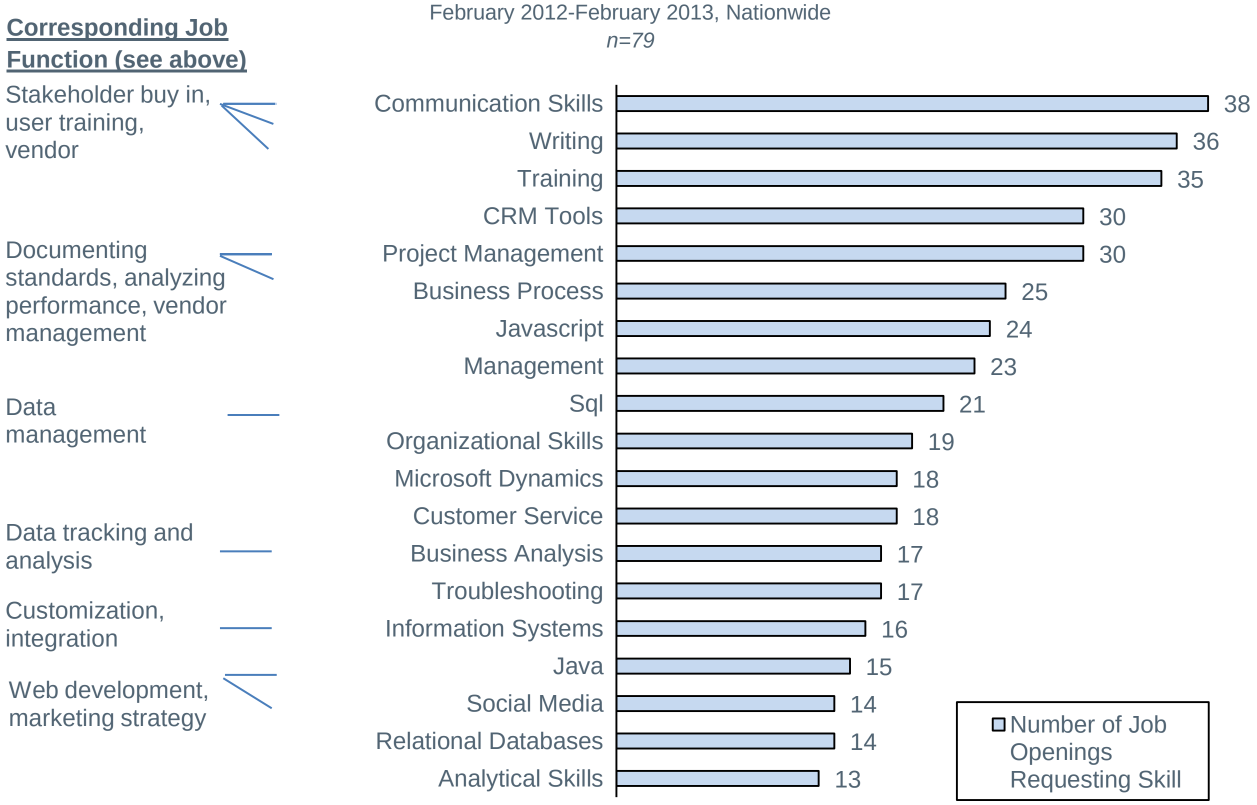
## Required Candidate Skills and Experience

In an analysis of 79 job descriptions provided by Burning Glass Technologies Labor/Insight artificial intelligence tool, a query for CRM specialists at colleges, universities, and education service vendors showed that the following skills occurred most frequently across job openings. The notations to the left of the chart link required candidate skills to core job functions; as you can see, an ideal CRM specialist possess a marketing background and has acquired some information and data management skills or is an IT expert who has learned marketing and communication strategy.

**Figure 3. Desired Skills and Previous Experience for CRM Specialists**[15]

February 2012-February 2013, Nationwide

*n=79*



**Candidate Evaluation Worksheet by Skill/Experience**

1. Consider the skills and experience outlined in Figure 3.
2. Identify the skills and experience that a specialist at your unit should demonstrate. Ascribe a rough priority for each and evaluate job candidates according to selected skills and previous experience.

| Desired Skills | Priority (1 – x) | How Does the Candidate Demonstrate that He or She Possesses Skill/Experience? |
|---|---|---|
| | | |
| | | |
| | | |
| | | |

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[15] Source: Burning Glass Technologies Labor/Insight

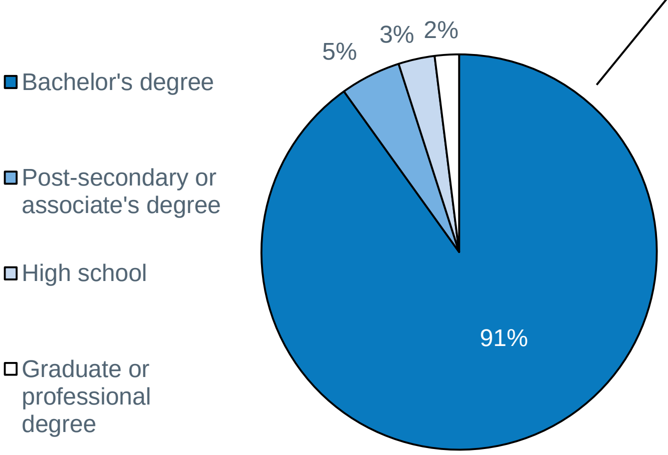
## Required Candidate Education and Years Professional Experience

Most job postings for CRM specialist in this analysis specify a minimum education and experience requirement. Consider the following benchmarks when specifying desired education and experience in a position description. Although not all job openings included in the analysis specified education or experience requirements, a majority require between one and four years of professional experience for CRM specialist candidates and a bachelor's degree.

**Figure 4. Education Requirements for CRM Specialist Openings**[16]

*February 2012-February 2013, Nationwide*

*n=64*



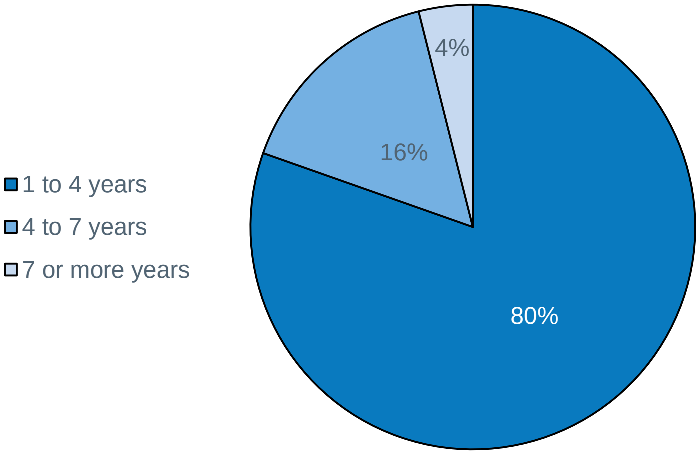
Top Required Majors

- Computer Science
- Business
- Information Technology
- Marketing

**Figure 5. Required Years Professional Experience for CRM Specialist Openings**[17]

*February 2012-February 2013, Nationwide*

*n=51*



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[16] Source: Burning Glass Technologies Labor/Insight

[17] Ibid.

# Tool #36: CRM Check-Up Guide

The arduous path to implementation often leaves CRM leaders with a false sense of completion once the system has been launched and utilization seems solid. However, lack of maintenance and continuous evaluation can cause CRM implementations to falter over time or fall far short of their full potential. In order for CRM to thrive, leaders should periodically and systematically check in on the system—both the human and technical elements—to ensure that it is meeting goals (or, if not, whether goals should be re-considered) and that it is performing well against pre-implementation benchmarks. With this information, leaders can develop ongoing improvement plans.

The CRM Check-Up Guide, which is optimally used six to eight months post-go-live, will help implementation leaders assess the overall health of the system in light of pre-established goals and expectations. In so doing, it will help craft future plans for improving the system.

## Overview of a CRM Check Up

1. Determining Baseline Capabilities
2. Inventorying CRM Activities
3. Assessing CRM's Human Infrastructure
4. Determining Next Steps

## 1. Determining Baseline Capabilities

Optimally, the health of your CRM implementation can be gauged relative to performance before the system was in place. Such comparisons paint the clearest picture and also tend to make the most compelling case for continued or additional resources and wider utilization. Prepare for the CRM check-up process by noting in the table below the metrics, KPIs, and benchmarks that you were/are monitoring before/during implementation and that you hope to see improve after implementation. For help determining KPIs to track, see Tool #39: CRM KPI Builder. Sample KPIs appear below, although ideally, unit leaders will select a benchmark for business drivers (i.e., "bottom line") outcomes and for each of the major functional areas affected by CRM.

| Functional Area | Metric | Benchmark (before CRM) |
|---|---|---|
| Communication with Prospects | Response Time | 2-3 days |
| | Customization of Communication | 1 program-specific email |
| | Communication Modalities | email, phone if prospect calls |
| Event Management | Attendance at Events | 10.5 attendees on average |
| | Number of Events | 7 events/year |
| | Funnel Penetration of Attendees | 20.5% apply; 10.2% enroll |
| Overall (Bottom-Line) | Number of Applications | 7,450 |
| | Conversion Rate | 14.6% |
| | Cost per Applicant | $540 |
| | Cost per Enrollment | $900 |
| | Staff time per Enrollment | 3.5 hours |

# Tool #36: CRM Check-Up Guide (cont.)

The examples above are representative: metrics listed in each category are not meant to be exhaustive, nor are the numbers taken from a specific institution. A similar set of lists should be made of your pre-implementation benchmarks.

## 2. Inventorying CRM Activities

The next step in assessing the progress of your CRM implementation involves taking stock of what exactly it is being used to do. For many, this list will reveal areas where the system is thriving and others where utilization has fallen off or new business processes have proven suboptimal.

| Typical CRM Activities | Attributes to Note |
|---|---|
| Interaction Tracking | • **Description**: What was the old state, current state, and goal state?<br>• **Value Proposition**: What is the overall good rendered by changes to the old state?<br>• **Cost/Benefit for Customers**: What are the specific costs and benefits for prospects?<br>• **Cost/Benefit for Institution**: What are the specific costs and benefits for the institution and staff?<br>• **Relevant KPIs/Benchmarks**: What metrics from Step #1 are specific to this activity?<br>• **Notes on Adoption**: How easily were CRM-driven changes to the activity adopted? What lessons were learned?<br>• **Overall Proficiency Grade**: What gut score would you apply to how well the activity delivered on its value proposition?<br>○ Pre-CRM Implementation<br>○ Post-CRM Implementation |
| Automated Communications | |
| Event Tracking/Management | |
| Knowledge Management System | |
| Marketing Campaigns | |
| Chat | |
| Self-Service Portal | |
| Call Center Management | |
| Reporting | |
| Custom: | |
| Custom: | |
| Custom: | |
| Custom: | |
| Custom: | |
| Custom: | |

### Example Inventorying Notes

The following is an example of the type of notes that CRM leaders should develop for each CRM activity/functional area.

**Notes on CRM Activity: <u>Automated Communications</u>**

**Description:** prospective students are placed on automatic communication tracks triggered by a prospect's demonstration of interest in the institution or a specific program (e.g., by submitting an inquiry form, calling, visiting, etc.). Communications are sent at pre-determined intervals once the first has been triggered. Communications in the series provide varied topical content; some are customized according to the prospect's program of interest.

**Value proposition:** Improve response rate and quality of communications with prospects while lowering the human resources needed to provide them. This allows recruiting staff to spend a greater share of their time engaged in one-on-one conversations with prospects that are likely to value them.

# Tool #36: CRM Check-Up Guide (cont.)

**Cost and benefit for customers:** No cost for customers. Benefit seen in improved response time, variety of content (e.g., program-specific, financial aid, career outcomes, etc.), and quality of content.

**Cost and benefit for institution:** Cost stems from staff time needed to develop and operationalize communications plan. Benefit is seen in staff time saved that would have otherwise been used communicating with prospects. Bottom line benefit: improved conversion rates, lower staff resources.

**Relevant KPIs/Benchmarks:**

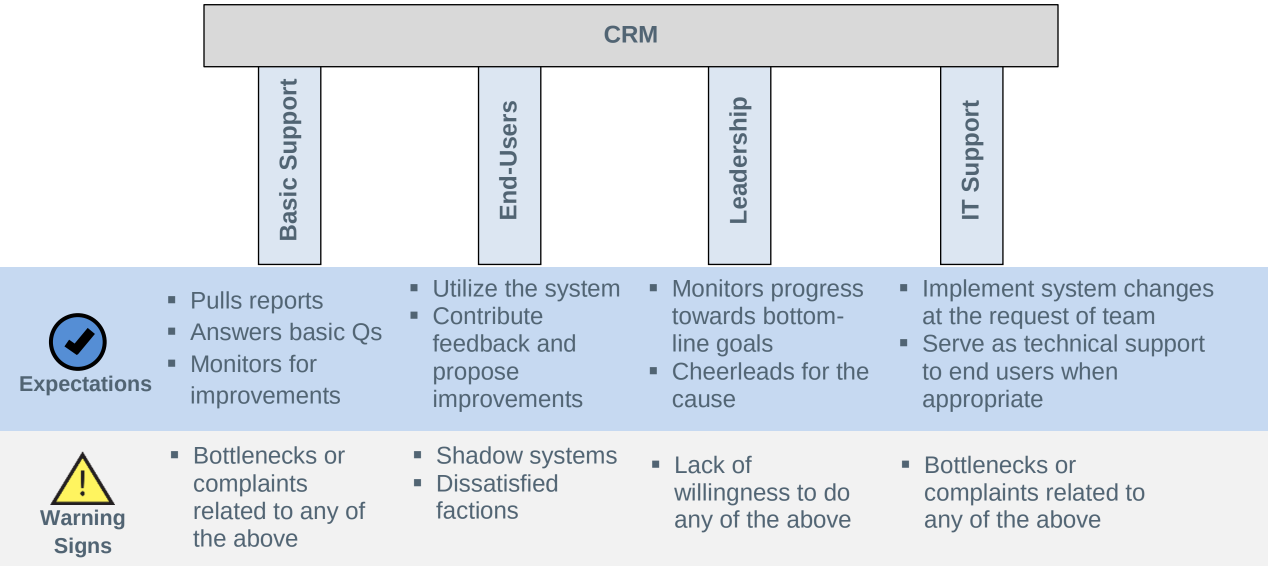
| | Before CRM | Post-CRM |
|---|---|---|
| Response Time | 2-3 days | 24 hours |
| Customization | 1 program-specific email | 5 program-specific emails interspersed across communication plan |
| Staff time required | ~2 hours spent on email across the lifespan of a cycle | 0 hrs (entirely automatic and triggered by inquiry form) |

**Notes on adoption:** Program-specific collateral still has not been developed for project management certificate program; have had difficulty gathering career outcomes insights (to incorporate into emails) from various program directors; need to re-assess the need for hard-copy mailings in the communication plan.

**Overall grade:** Before CRM (when this was done by hand): C    After CRM (automated): B+

## 3. Assessing CRM's Human Infrastructure

Another key component to a sound and sustainable CRM implementation is the support it receives from staff. A thorough check-up assesses the strength of these sources of support. For most, this dimension of the check-up will be predominantly qualitative. That should not prevent you from reviewing the behaviors expected of each group of constituents and monitoring for warning signs (summarized in the diagram below).



| | Basic Support | End-Users | Leadership | IT Support |
|---|---|---|---|---|
| ✓ Expectations | Pulls reports<br>Answers basic Qs<br>Monitors for improvements | Utilize the system<br>Contribute feedback and propose improvements | Monitors progress towards bottom-line goals<br>Cheerleads for the cause | Implement system changes at the request of team<br>Serve as technical support to end users when appropriate |
| ⚠ Warning Signs | Bottlenecks or complaints related to any of the above | Shadow systems<br>Dissatisfied factions | Lack of willingness to do any of the above | Bottlenecks or complaints related to any of the above |

# Tool #36: CRM Check-Up Guide (cont.)

## 4. Determining Next Steps

### Are Your Original Goals Your Current Goals?

Before completing your final analysis, CRM champions should consider whether their original CRM strategies and goals still apply. It is not uncommon for them to change in light of the on-the-ground reality of implementation.

After your current CRM strategy has been confirmed, you can move on to determining next steps. For both the CRM activities you inventoried as well as the Human Infrastructure you assessed, you should determine which fall into the categories below and develop plans accordingly.

| | Definitions | Suggested Actions |
|---|---|---|
| **Thriving** | Robust, resource-efficient, an exemplar | Assess for best practices and lessons that can be applied elsewhere. Consider the drivers of success. |
| **Stable** | At steady-state; will reliably continue without additional attention | Hold the course. |
| **Weak** | Faltering; demands additional attention and resources | Consider the drivers of failure; re-assess relevance of activity to strategy; look for opportunities to apply best practices and lessons learned from above |

## 5. Assembling a Summary Table

Funnel final thoughts about the health of each CRM component in the table below.

| | Component | Health | Action Steps |
|---|---|---|---|
| **Functional Components** | Interaction Tracking | Weak--Stable--Thriving | |
| | Automated Communications | W-----------S-----------T | |
| | Event Tracking/Management | W-----------S-----------T | |
| | Knowledge Management System | W-----------S-----------T | |
| | Marketing Campaigns | W-----------S-----------T | |
| | Chat | W-----------S-----------T | |
| | Self-Service Portal | W-----------S-----------T | |
| | Call Center Management | W-----------S-----------T | |
| | Reporting | W-----------S-----------T | |
| | Custom: | W-----------S-----------T | |
| | Custom: | W-----------S-----------T | |
| | Custom: | W-----------S-----------T | |
| **Human Components** | Basic Support | W-----------S-----------T | |
| | End Users | W-----------S-----------T | |
| | Leadership | W-----------S-----------T | |
| | IT Support | W-----------S-----------T | |
| | Custom: | W-----------S-----------T | |
| | Custom: | W-----------S-----------T | |

# Tool #37: CRM Key Performance Indicators Builder

The COE Forum has compiled this list of Key Performance Indicators (KPIs) from interviews with dozens of university CRM implementers as well as literature produced by CRM experts like Salesforce and Forrester. The list is meant to serve as an introduction to assessing CRM impact, which many CRM implementers struggle with or fail to formally accomplish altogether. Please note that the KPI Builder is not intended to be exhaustive. Rather, the KPI Builder presents the most commonly tracked CRM metrics given likely goals for the technology.

**Implementation Note**: Although organized around types of goals for ease of use, the KPI Builder will be most useful for institutions that articulate concrete business objectives they would like to achieve with CRM before identifying the appropriate mechanisms for pursuing those objectives. Selecting Key Performance Indicators should always be done with business goals in mind for CRM efforts—and the time staff spend tracking them—to be maximally effective.

## CRM Key Performance Indicators (KPIs)

### Revenue Enhancements

- Average revenue/student
- Number of accounts/student
- Average revenue/employee
- Average revenue/enrollments growth by region
- Cost of sales & marketing as % of revenue
- Cost per lead
- Customer Acquisition Cost (CAC)
- Customer Lifetime Value (CLV)
- Conversion forecast accuracy
- Churn/Attrition

### Marketing

- Marketing campaign response rates
- Email open rates
- Email click through rates
- Email unsubscribe rates
- Website visits
- Landing page activity
- Number of campaigns
- Number of leads by campaign
- Number of purchases by campaign
- Revenue generated by campaign
- Cost per interaction by campaign
- Number of new customers acquired by campaign

### Recruiting

- Volume of inquiries
- Number of new customers
- Number of retained customers
- Volume of applications
- Volume of enrollments
- Funnel drop-off rate
- Relationship freshness
- Conversion rate
- Response time
- Time to conversion
- Time in each funnel stage
- Percent of prospects that receive a phone call
- Percent of prospects that engage in instant chat
- Percent of prospects that attend an event
- Percent of prospects that reply to an email
- Cost per prospect contact
- Volume of enrollment functions completed online (self-managed by prospect or student)
- Number of phone conversations (across all opportunities)
- Number of instant chat conversations (across all opportunities)
- Number of events held
- Average event registrations
- Average event attendees
- Average event registration fall-off

# Tool #37: CRM Key Performance Indicators Builder (cont.)

### Customer Satisfaction and Retention

- Actions per engagement
- Volume of prospect/student complaints
- Share of key students ' purchases
- Percent of prospects who went elsewhere
- % Revenue to new versus existing customers
- Customer Lifetime Value (CLV)
- Number of repeat students
- Number of referrals to other customers

## Tips for Selecting the Right KPIs

Of course, tracking all of the KPIs listed above would be overwhelming and not particularly helpful. The process of defining a value-based CRM plan starts with linking the highest-level corporate business goals to a clear set of specific CRM strategies and tactics. Metrics should be selected to support those goals.

Forrester[18] suggests the following four-step guide:

1. **Define and quantify business goals.** Quantify how your CRM initiative will either increase revenues from customers or decrease the costs of acquiring and serving them. For each targeted business outcome, define a method for estimating the size of the expected benefit.
2. **Formulate CRM strategies and tactics.** Define your strategies and tactics to achieve the goals you've defined and quantified, and identify appropriate tactics for each important customer-facing function, i.e. marketing, sales and service.
3. **Establish appropriate CRM measures.** For instance, customer service metrics might include number of calls handled per agent, or first call resolution. Voice of the customer feedback metrics might include Net Promoter Score. Establish the current baseline of performance before you start your CRM initiative and define the increment of improvement that you want to achieve at a specified time in the future. Monitor these metrics on a regular basis and take remedial action if you find yourself falling short.
4. **Link CRM goals, strategies and metrics.** For instance, if your business goal is to improve revenue from new sources by 10%, your strategy might be to increase average deal size by selling more solutions instead of individual products. The metrics associated with this approach could be average deal size and average revenue per sales rep.

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[18] Source: http://www.forrester.com/Define+The+Right+CRM+Metrics/fulltext/-/E-RES59408?objectid=RES59408