



Marketing Across the Program Lifecycle

COE Forum





EAB

Marketing Across the Program Lifecycle

COE Forum

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The COE Forum is a member-based organization that provides best-practice research and market intelligence for continuing, online, and professional higher education leaders.

We offer our members expert advice and innovative strategies for tackling their most pressing issues, tested and proven to work by their peers at other institutions across the country. Our research terrains of expertise include best-in-class marketing and recruiting, employer-focused market research, and leading campus innovation.

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Supporting Members in Best Practice Implementation

Resources Available Within Your Membership

This publication is only the beginning of our work to assist members in adult learner recruitment. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with members of the COE Forum 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), email your organization’s dedicated advisor, or email research@eab.com with “COE Forum ‘Marketing Across the Program Lifecycle’ Request” in the subject line.

Implementation Road Maps and Tools



Throughout the publication, this symbol will alert you to any corresponding tools and templates available in the Toolkit at the back of this book. These tools are also available on our website at eab.com.

Recorded and Private-Label Webconference Sessions



Our website includes recordings of two hour-long webconferences walking through the practices highlighted in this publication.

Forum experts are also available to conduct private webconferences with your team.

Unlimited Expert Troubleshooting



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

Facilitated Onsite Presentations



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.



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To order additional copies of this book, or to learn about our other services, please visit us at eab.com or contact us at 202-266-6400.

Systemically Examining COE's Marketing Challenge

Overview of COE Forum's Marketing and Recruiting Best Practice Research

While no linear path to enrollment exists for nontraditional students, the illustrative marketing funnel on the opposite page, divided into three sections—awareness, decision, and loyalty—helps to organize the COE Forum's marketing and recruiting best practice resources. Each segment of the funnel corresponds to a major theme the Forum has explored at member direction since its launch in 2011, and the resources listed under each segment correspond to studies, study chapters, or implementation toolkits immediately available now.

The primary challenge COE members faced during the Forum's launch in 2011, illustrated with the "awareness" portion of the funnel, was one of lead generation. Emergent marketing channels, particularly on social media, provoked questions about what presence higher education should have on platforms like LinkedIn and Facebook.

As competition for enrollments intensified, members directed the Forum to examine the center of the funnel, or the "decision" portion. While typically a marketing funnel will narrow over time through the process of lead qualification and cultivation, in higher education and COE in particular that funnel is widest from awareness to decision. This is due to the combination of known leads moving through the traditional funnel, and silent, independent student shoppers who appear for the first time in this funnel segment following their submission of a partial or complete application form.

Represented in the top box in the middle of the funnel are self-service shoppers or stealth applicants, comfortable independently searching for and comparing institutions and programs without interacting with marketing communications, recruiters, or admissions counselors. The COE Forum offers robust research and implementation tools to help members optimize prospective students' self-service experience through enhanced website and mobile presence and using try-before-you-buy content marketing to engage and encourage prospective students to enroll.

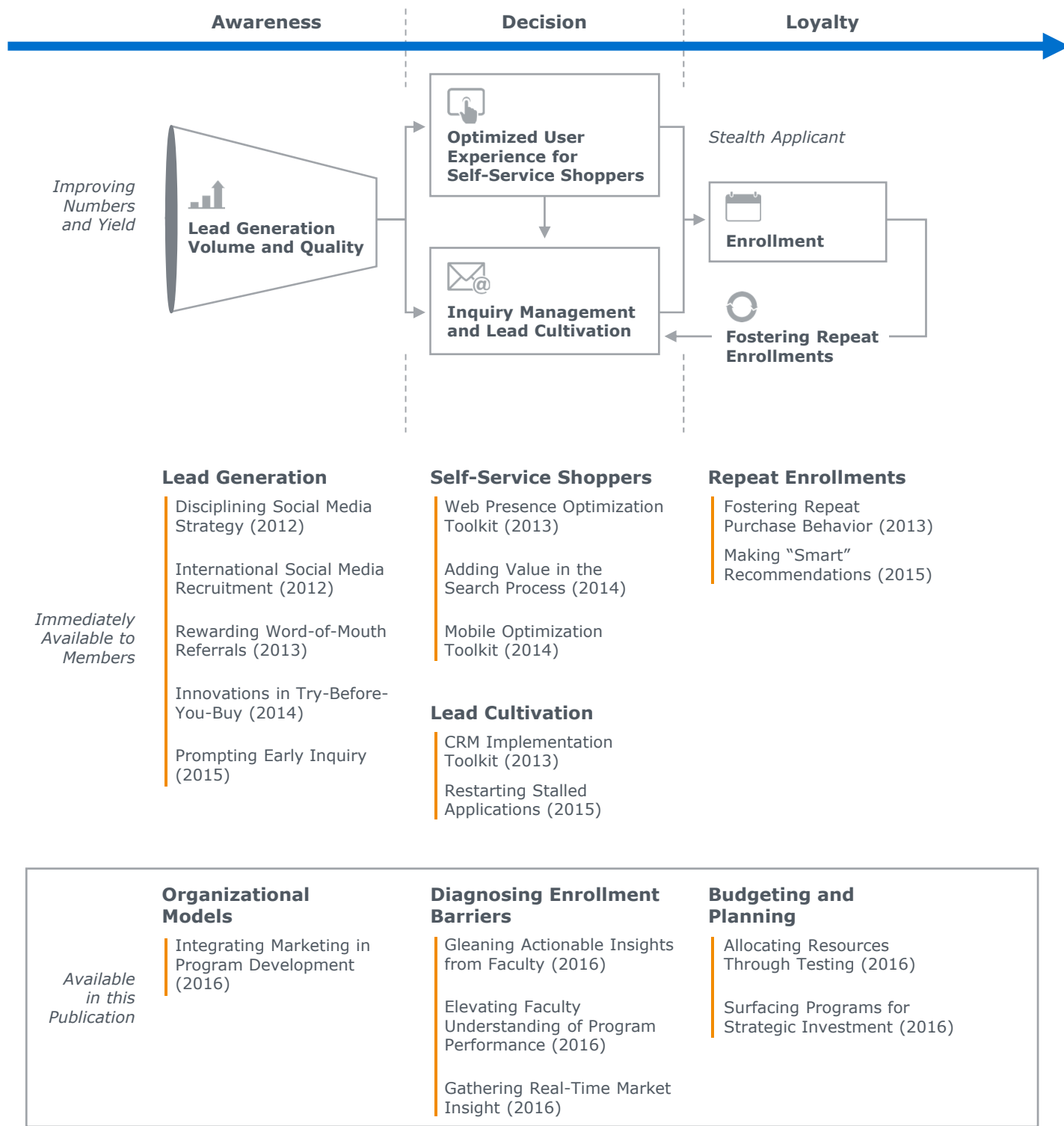
The second box represents those students who do choose to inquire, known leads, and member questions in this portion of the funnel focus on how to manage inquires and cultivate leads through application and enrollment. Given many COE units struggle to discipline lead nurturing and cultivation processes to increase yield, the COE Forum offers resources to implement and manage CRM software, as well as nudging students to restart stalled applications.

In the "loyalty" portion of the funnel, the COE Forum has identified best practices to position the COE unit as a lifelong learning partner for students and encourage re-enrollment, helping members recommend the right credential at the right moment in time to the right student. These studies illuminate how members can convert individual course takers into multiple course takers, then into certificate seekers, and finally into degree completers with stackable programs aligned with student career needs.

Below the illustrative funnel lies the research contained in the following pages of "Marketing Across the Program Lifecycle." This study addresses the fact that, though marketing has advanced and evolved rapidly in recent years, marketers are often not formally involved in decision making during program development and launch, and lack formal mechanisms to help unit and program leadership calibrate marketing investment in existing programs to take advantage of latent opportunities for growth. This work helps inform the fundamental organizational processes and structures necessary to ensure implementation of best-in-class marketing practices across the funnel.

Systemically Examining COE's Marketing Challenge

Overview of COE Forum's Marketing and Recruiting Best Practice Research



Executive Summary

Marketing Across the Program Lifecycle

Marketing Essential to Navigating Constantly Evolving Landscape

Today's COE marketers and recruiters face a prospective student landscape that is fundamentally different from that of just a few short years ago. With more educational options than ever, a wealth of information at their fingertips, and the online shopping savvy needed to independently build their consideration set, it has become increasingly challenging to capture and sustain the attention of prospective students through a long and competitive decision making cycle.

Four forces elevate the need for more purposeful integration of marketing capabilities across the program lifecycle:

- 1. Stealth Applicants a (Growing) Majority of the COE Prospect Pool.** Today's prospective adult students are skilled online shoppers, adept at, and increasingly comfortable with, independently finding and comparing institutions and programs to meet their varied educational needs. Many COE units report increases in the percentage of applicants classified as stealth—with figures as high as 70% at many institutions—calling into question the traditional approach to prospect management.
- 2. Unprecedented Growth in Marketing Channels and Technologies Pose an Investment Conundrum.** State-of-the-art marketing practice evolves rapidly, resulting in an ever increasing number of marketing channel options and technology solutions. Uncertain about which options represent truly promising opportunities and are thus worthy of investment, COE units risk wasting scarce budget dollars on untested channels and technologies.
- 3. Competitive Landscape Evolving from Focus on Private Sector to Non-Profit Institutions Expanding Nationally.** Large and growing nonprofit disruptors have made significant investments in expanding their online portfolios and entering new markets, gaining market share from for-profit colleges and universities who continue to face considerable consumer and legal scrutiny. Articulating a value proposition distinct from other nonprofit institutions is much more difficult than differentiating from for-profit institutions.
- 4. Rapid Professionalization of Marketing Across Sectors Introduces New-to-Higher Ed Competencies.** To meet the challenges posed by changing consumer behavior, proliferating marketing channels and technology, and markets saturated with sophisticated competitors, the COE marketing function has evolved rapidly from a primary focus on program promotion to a strategic partner with influence across the "Four Ps" —product, price, place, and promotion.

Lack of Integration Between Marketing and Program Partners Prevents Growth

Informal or nonexistent relationships between program development and marketing often result in programs that are misaligned with market demand. When the marketing team is not involved in the program development process, marketers often learn of new program launches too late to positively inflect application and enrollment numbers, and cannot impart their knowledge of the prospective student profile to align the program with market demand. After launch, COE unit and program leaders who fail to incorporate marketing's consumer-facing perspective miss opportunities to maintain program competitiveness and either sustain or increase enrollments over time.

Executive Summary (cont.)

Marketing Across the Program Lifecycle

Marketing Before Launch—Integrating Marketing Research and Strategy Prior to Launch

Formalize marketing’s role in program ideation and launch. While many institutions have standard, often multistage program development and approval processes, marketing leaders are too often only involved after a program receives approval for launch. To ensure opportunities exist for marketing to inflect new program design and positioning prior to launch, COE leaders must deliberately integrate the marketing function as an equal strategic partner in program development, rather than a service provider post-launch.

Partner with faculty to systematically gather program- and student-specific insights. While academic partners possess essential knowledge of a program’s content, its competitive strengths and value proposition, and the students that it aims to serve, faculty often lack the incentive or occasion to share this knowledge with marketing. Provide academic partners and marketing directors tools and a forum to easily translate program-level insights into a strategic marketing plan.

Create a culture of experimentation to assess new program and marketing ideas before implementation. The proliferation of channels and technologies requires marketers to constantly experiment with and adjust the marketing channel and strategy mix for each program in the portfolio. Design a disciplined approach to experimentation and allocate a percentage of marketing and program development funds to test new channels and create programmatic proofs of concept prior to full implementation.

Calibrating the Portfolio—Diagnosing Enrollment Growth Barriers after Program Launch

Define a common set of enrollment and marketing metrics to monitor performance and identify programs with greatest potential for growth. To remain competitive, progressive units maintain a holistic understanding of program performance and identify slow-growth programs with the opportunity for enrollment growth. Formalize opportunities for marketing to collaboratively diagnose barriers to enrollment in partnership with faculty members to ensure academic buy-in, combine the insights and perspectives of both stakeholders, and ensure budget and time are invested wisely.

Cultivate external and internal partnerships to identify opportunities to improve performance across all programs. To effectively diagnose barriers to enrollment and activate the portfolio’s potential, COE leaders must solicit the perspectives of all groups under their purview: students, faculty, marketing, frontline staff, and employers. By systematically gathering information from all groups, COE units can nurture a collaborative, transparent, data-driven decision-making culture and maximize holistic program performance and success.

Allocate resources to maximize opportunities for growth. To maximize the latent potential of many slow growth or steady state programs, marketers must allocate their resources according to opportunities for future growth, rather than relying on inflexible budget policies, unconfirmed intuition, or historical performance alone.



The Challenge

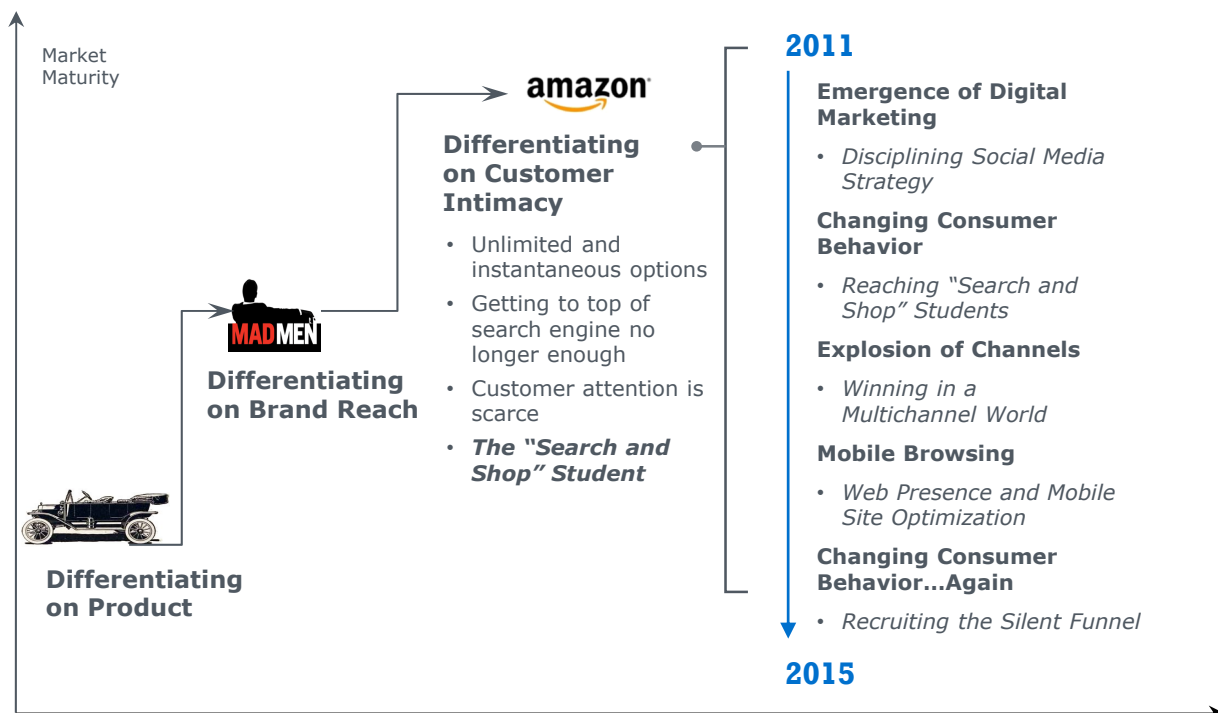
Marketing Across the Program Lifecycle

INTRODUCTION

Changing Rules of the Game

Slightly Over-Simplified History of Marketing in One Page

Continuing, online, and professional education marketing leaders are navigating a seismic shift in the approach to student acquisition. The days when demand exceeded supply and product alone was enough to distinguish an institution or COE unit are gone. Even mastering “brand reach” disciplines (e.g., SEO) is no longer sufficient to secure enrollments in today’s highly commodified market.



Today’s COE marketers and recruiters face a prospective student landscape that is fundamentally different from that of just a few short years ago: 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 presented numerous challenges, and meeting the demands of these students with limited marketing and recruiting resources is proving to be the most difficult yet.

Illustrated on the right side of the above graphic, the COE Forum has published numerous research studies and implementation resources to help member institutions navigate these emergent challenges and keep pace with rapidly changing state-of-the-art marketing practice.

Constant Disruption the New Status Quo

The COE Forum has identified four fundamental forces elevating the need for a more purposeful integration of marketing capabilities across the program lifecycle. First, today's prospective students are skilled online shoppers, adept at, and increasingly comfortable with, independently finding and comparing programs and institutions to meet their varied educational needs. Second, state-of-the-art marketing practice evolves rapidly, resulting in an ever increasing number of marketing channel options and technology solutions.

Four Forces Elevating Need for New Marketing Mandate

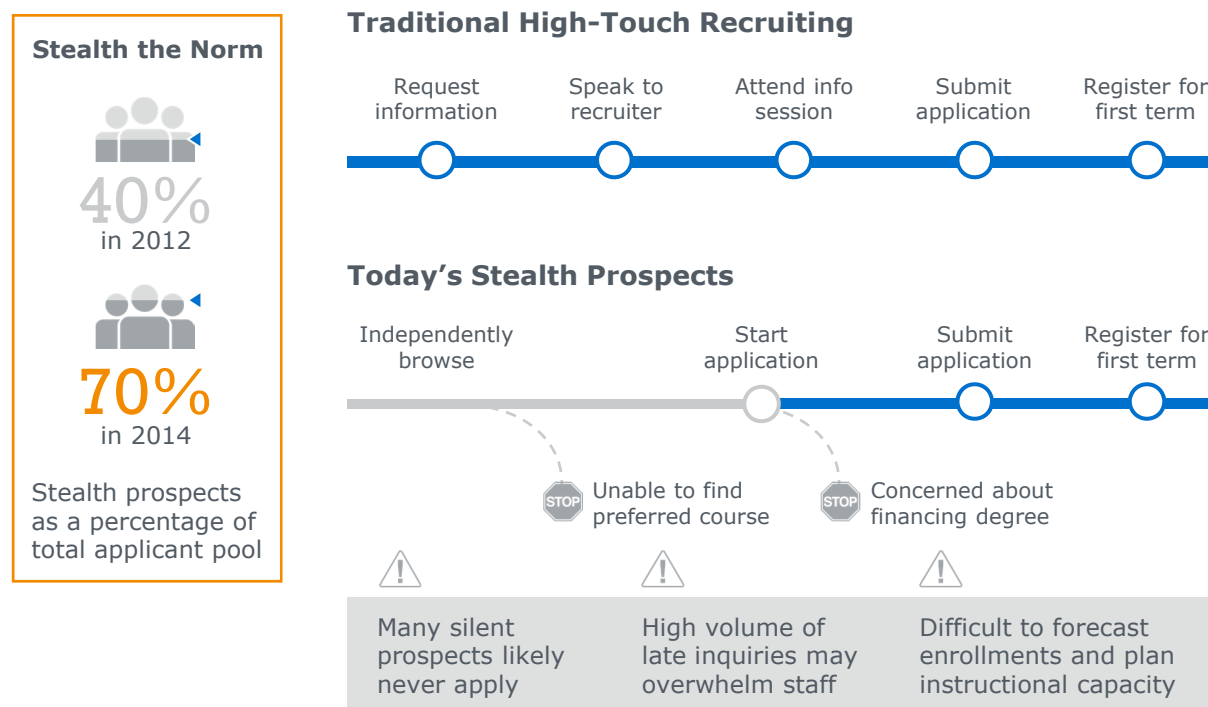


Third, an already crowded market of COE programs faces an influx of large scale competition from traditional nonprofit institutions, complicating the value proposition for smaller, less well-resourced COE units. Finally, and fortunately, the rapid professionalization of marketing across sectors has introduced new-to-higher-ed competencies, allowing the COE marketing function to evolve past a primary focus on program promotion to a strategic partner with influence across the program lifecycle. This rapid advancement of marketing skills and competencies allows COE units to develop, position, and promote their programs in new and innovative ways, increasing competitiveness.

An Increasingly Silent Funnel

Students Ever-More Comfortable with Independent Search

Since 2012, the “search and shop” student trend has accelerated, with COE units reporting an increase in the percentage of stealth applicants—as high as 70% at many institutions. Prospects have also become less likely to self-identify early in their decision making process, rendering the linear, high-touch approach to recruiting nearly irrelevant. As a result, the COE marketing funnel has become increasingly “silent,” populated by students who are independently defining their consideration set and circumventing the traditional recruiting process.



An increase in the stealth applicant pool poses three fundamental challenges for COE leaders:

1. There is concern about the missed opportunities posed by prospects in the silent funnel. As these prospects circumvent the personal interactions highly correlated with conversion, they may face roadblocks and simply disappear, never applying or requesting information.
2. Inquiry volumes tend to spike close to the application deadline, potentially overwhelming staff and limiting enrollments.
3. It is difficult to forecast enrollments and plan institutional capacity.

An Investment Conundrum

Unprecedented Growth in Marketing Technologies and Channels

Stealth prospects put pressure on the already resource-intensive recruitment process, while a commensurate proliferation of marketing channels and technologies leaves marketers unsure how best to invest their budgets. State-of-the-art marketing practice is rapidly evolving, and the number of available channels and technology solutions has also grown at an unprecedented rate. The graphic below from chiefmartec.com illustrates the explosion of marketing technology solutions in the past five years, while the columns on the right offer a cross-section of available channels from which marketers must choose.

Explosion of Marketing Tech Solutions

2011:
~100
companies



2015:
~2,000
companies



Image credit: chiefmartec.com

Feels Like Throwing Spaghetti at the Wall

| | | |
|-----------------------|---------------------|-------------------------------|
| Analytics | LinkedIn groups | Public transportation signage |
| Affiliates | Loyalty programs | Professional associations |
| Billboards | Magazine ads | Search engine optimization |
| Blogging | Microsites | Sentiment analysis |
| Call center | Mobile | SMS messaging |
| Catalog | Newspaper ads | Tablet |
| Digital banners | Paid leads | Television |
| Email | Pay per click | Twitter |
| Employer partnerships | Press releases | Videos |
| Events | QR codes | Webchat |
| Facebook advertising | Radio ads | YouTube channel |
| Infographics | Referral incentives | |
| LinkedIn advertising | | |

With so many marketing channels and technology solutions to choose from, COE and marketing leaders can easily become overwhelmed, unsure which options represent truly promising opportunities and which risk wasting scarce budget dollars. While these solutions have the potential to benefit the marketing team considerably, technology alone does not lead to success. Likewise, while the elusive optimal mix of marketing channels promises to reach every interested prospective student, in reality marketers cannot afford to invest in every new channel and must instead limit and focus their investment and outreach efforts.

Ultimately, to help keep their units competitive, marketers must move beyond making tactical channel-level decisions and develop internal practices to position themselves as strategic partners in program development and launch, regularly collect and analyze program performance data, and dynamically allocate their scarce time and resources according to program need and opportunity.

Source: "Marketing Technology Landscape Supergraphic," Chief Marketing Technologist Blog, <http://chiefmartec.com/2015/01/marketing-technology-landscape-supergraphic-2015/>

Competitive Landscape Evolving

Sophisticated Market Research and Rise of National Nonprofit Players

In addition to shifts in the students they serve and the tools at their disposal, COE leaders must contend with the changing nature of their competition, which the COE Forum uses two primary indicators to track. First, increasingly sophisticated market research requests from member institutions across the past five years—ranging from identifying secondary markets for signature offerings, to executing employer partnerships, to aligning more closely with industry demand—illustrate the mandate for a deliberate and differentiated product development and delivery strategy to compete. Second, the type of institutions gaining outsized market share in COE has shifted in recent years from for-profit enterprises to large and growing nonprofit disruptors.

Lessons from 1,000 Market Research Reports

2011



Is there demand for this field in our region?



Next-Level Questions in 2015



How can we identify and leverage employer partners?



In what secondary markets should we recruit online students?



How do we align our existing program to shifting industry demand?

2015

From Familiar For-Profit Players...



- Avg marketing spend of 15% -27% of gross revenue
- Apollo Group spent \$96.5 million on media in 2013
- \$53.5 million on Google Ad Words alone—10th place overall

...To New, More Traditional Entrants



- SNHU spends about \$20 million on TV ads each year
- Doubled online enrollments from 2012 to 2014



"I can give you several million reasons why our marketing strategy doesn't look like ASU Online's."

*Marketing Director
Large Public Research
University*

In the past, for-profit institutions, who consistently outspent nonprofit competitors by millions of dollars, represented the most challenging competition for nontraditional and adult learners. Today, nonprofit competitors with large and growing online program portfolios represent the greater threat. Even for institutions without equivalent budgets or ambitions, articulating a value proposition distinct from other nonprofit institutions is much more difficult than differentiating from for-profit institutions, especially while the latter face considerable consumer and legal scrutiny.

Source: "Amazon Tops List of Google's 25 Biggest Search Advertisers," *Advertising Age*, <http://adage.com/article/digital/amazon-tops-list-google-s-25-biggest-search-advertisers/294922/>

Rise of the Multidimensional Marketer

Rapid Professionalization Introduces New-to-Higher Ed Competencies

To meet the challenges posed by changing consumer behavior, proliferating marketing channels and technology, and markets saturated with sophisticated competitors, the COE marketing function has evolved rapidly. COE leaders are redefining the skills and experience they expect from their marketing and recruiting staff, and many are looking outside of higher education for the talent their organization needs. Whereas in the past marketing was considered a mostly promotional and copywriting function, marketers today are indispensable partners helping to guide strategy and develop programs.

From Advertising Agency to Full Service Marketing Department



Yesterday

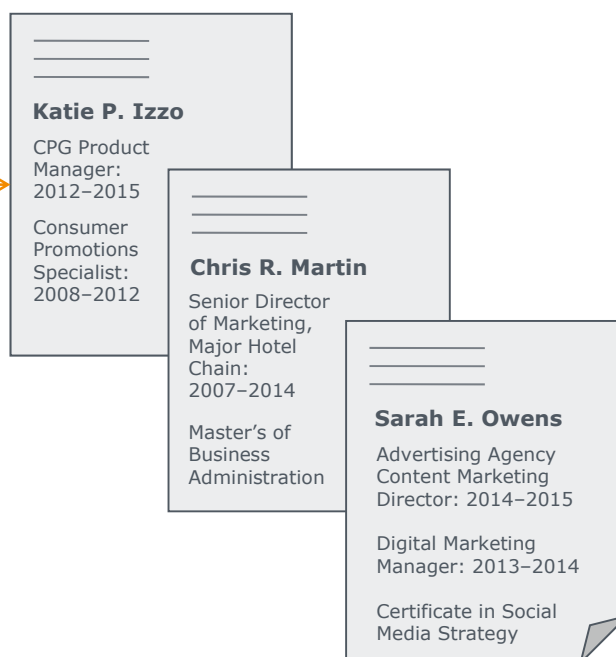
- Populated by publication managers, copy writers, and graphic designers
- Primary emphasis on promotion tactics (press releases, print collateral, and media buys)



Today

- Populated by new-to-higher ed positions (marketing directors, market research analysts, and social media specialists)
- Equal attention to the 4Ps (product, price, place, and promotion)
- Increased presence of third-party vendors

A Quick Glance Around the Membership



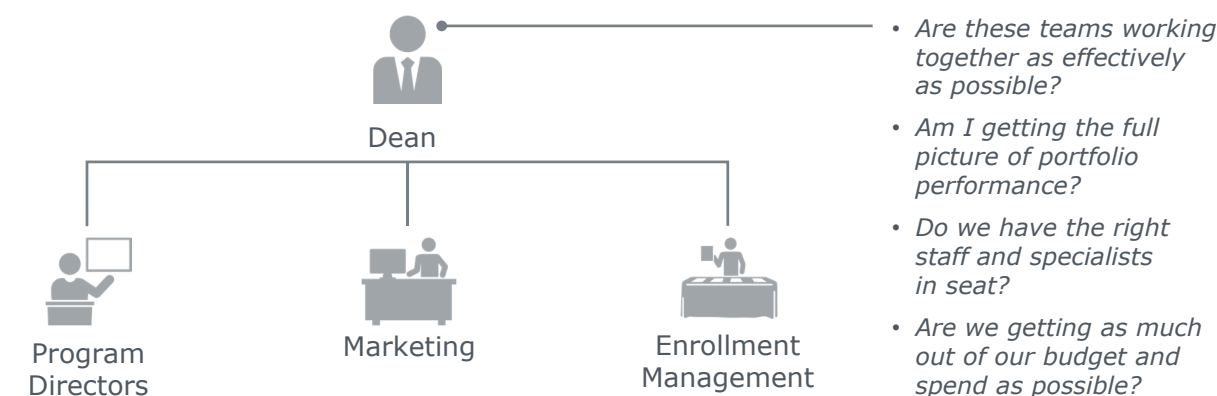
The rise of marketing specialists—with skill sets ranging from social media, to digital analytics, to data mining—strengthens COE units, but does not guarantee that the rest of the organization understands these new competencies. To serve nontraditional and adult students effectively with innovative, market-driven program offerings, every functional group in the COE unit—from faculty and program leadership, to marketing, to enrollment management—must communicate and collaborate effectively.

The Leadership Challenge

Formalizing Informal Relationships as the Portfolio and Ambitions Scale

To foster the organizational cohesion necessary to develop and deliver competitive programs, COE leaders must facilitate intentional connection points, or moments of collaboration, between three functional groups: faculty and program leadership, marketing and recruiting, and enrollment management. In the past, many institutions relied on informal networks, wherein individuals working in different functions might accidentally learn of a new program launch and brainstorm cross-functional strategies to ensure success on an ad hoc basis. Today, with increasingly large and complex program portfolios, and the speed with which organizations must respond to shifting market needs, units must formalize these communication channels and collaborative processes.

Illustrative Organizational Model



| In Any Organizational Structure | | |
|---|---|---|
| Shared service unit that relies on academic department to recruit | Independent unit with dedicated marketing and recruiting team | Dependent on central marketing to allocate portion of their budget to support unit activities |

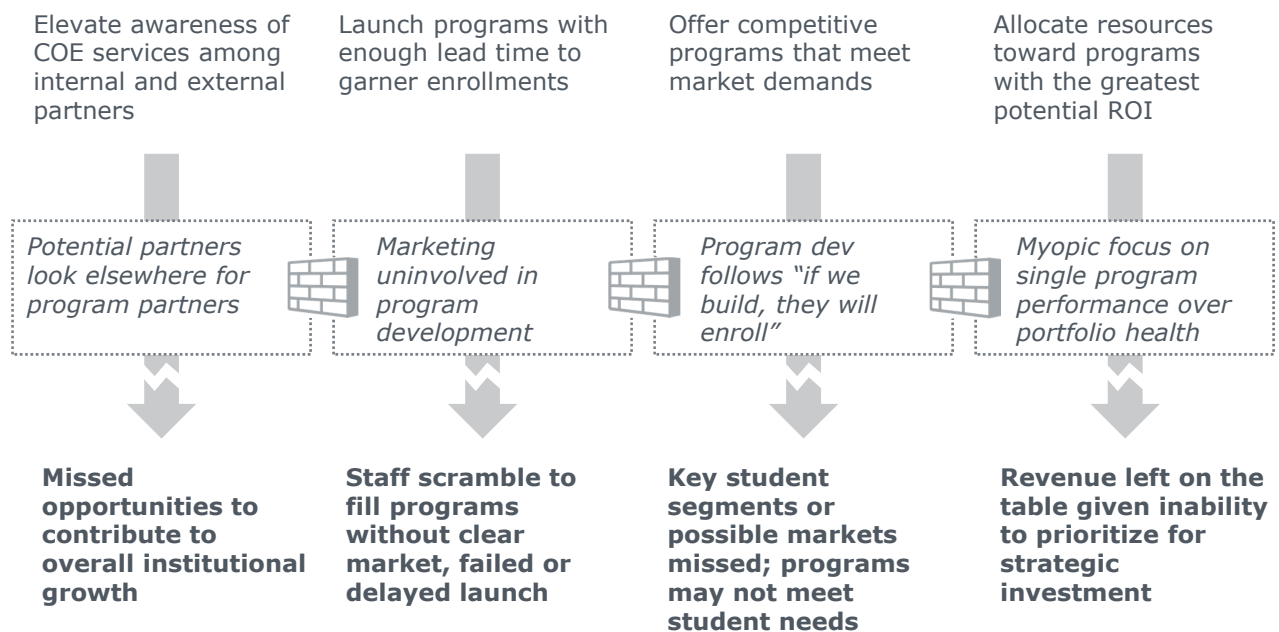
Every COE leader, regardless of organizational structure, must ensure that these groups are formally collaborating to manage the health of the program portfolio—not simply signature or struggling programs—and maximize the impact of the budget dollars allocated to marketing, program development, and enrollment management.

This challenge is not limited to COE or to higher education. As John Hayes, CMO of American Express, states: “I haven’t met anyone who feels they have the organization completely aligned with where the revolution is going because it’s happening so fast and so dramatically. Marketing is touching so many more parts of the company now. It touches on service. It touches on product development. We need to break down the traditional siloes of business.”

An Organizational Dilemma

Lack of Integration Delaying or Preventing Unit Growth

COE leaders must elevate awareness of marketing services among internal and external partners, launch programs with enough lead time to garner enrollments, offer competitive programs that meet market demands, and allocate resources toward programs with the greatest potential return on investment. However, despite efforts to foster cross-team integration and collaboration, when the marketing team cannot contribute fully to the unit's strategic priorities, four distinct challenges emerge.



When academic partners do not understand the marketing team's capabilities and services and seek support from external vendors or other on campus groups such as central marketing, COE marketers miss crucial opportunities to contribute to program enrollment and institutional growth. When the marketing team is not involved in the program development process, marketers often discover new program launches too late to positively inflect application and enrollment numbers, and cannot infuse their knowledge of the prospective student profile to help align the program with market demand. Finally, marketing resource allocation strategies that focus on the performance of single programs rather than the overall program portfolio overlook latent growth opportunities that slow growth or steady state programs represent.

Failure to Launch

Small Private Institution Suffers Unfortunately Common Fate

The marketing team can serve a critical role in helping develop market-driven new program ideas, validate those ideas with market research analyses, build marketing plans targeted to likely prospective students, and ensure sustainable long-term enrollment growth. Unfortunately, communication failures between COE leadership, faculty members, and marketing staff can negatively impact enrollments and unit reputation.

Multiple Missed Opportunities to Involve Marketing in Program Launch

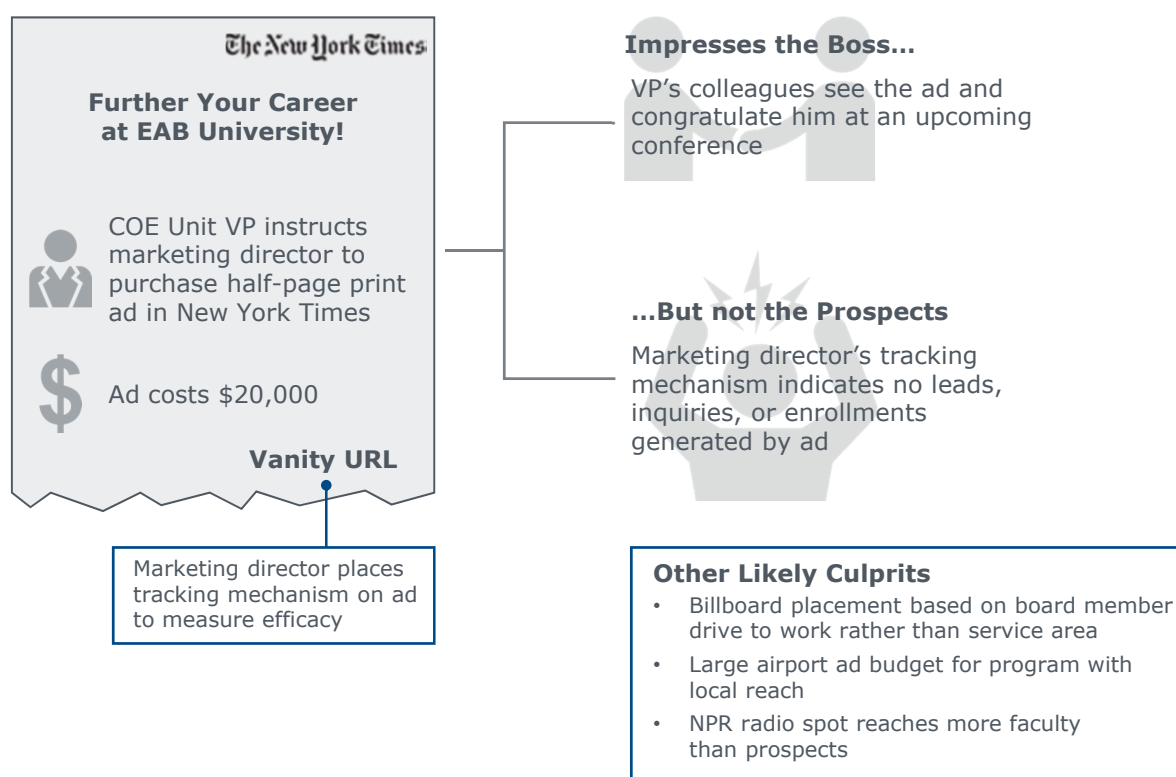


In the above example, a small private institution decided to develop and launch a Bachelor of Arts in Computer Science, responding rapidly to demonstrable local industry need for computer science graduates. Unit leadership was helping to accelerate the process to capitalize on the market demand and, therefore, the marketing team was not involved in the development process. Preliminary market intelligence only indicated that a need for computer science skills existed, but did not analyze student and employer preferences for the type and format of program the unit should offer. When the program launched, the unit received an above average volume of inquiries from prospective students, but very few students ultimately enrolled. Frontline staff reported that prospective students desired a B.S. credential, not a B.A., and the marketing team could not fill the initial cohort.

Getting on the Same Page

Success of Expensive Ad Depends on Who You Ask

Given changing student behavior and increasing competition, unit and marketing leadership must work together closely to set marketing strategy, prioritize the marketing team's efforts, and ensure that all stakeholders maintain similar expectations for those efforts' outcomes. Though enrollment growth represents a common priority for all COE stakeholders, these groups may have different ideas about how best to facilitate that growth, and misaligned expectations can still trouble well-functioning teams. COE leaders may focus on higher-level strategic priorities such as brand building and competitive positioning, while marketers focus on more tactical elements such as lead generation for individual programs.



In the above example, the VP of a COE unit invested \$20,000 in a half-page *New York Times* ad to promote the unit's brand, educating stakeholders both on- and off-campus about his organization's excellence, but did not communicate his brand building strategy to his marketing director. The marketing director used the advertisement as a recruitment initiative and placed a vanity URL at the bottom of the ad to track incoming leads, applications, and enrollments. While the VP was convinced of his strategy's success after colleagues and competitors approached and congratulated him at a conference the following month, the marketing director grew increasingly frustrated when in the same period of time she could attribute no leads to the ad. Misaligned expectations can easily lead to wasted time and effort, and engender frustration between functional groups that must be able to trust and work efficiently with one another.

One Size Doesn't Fit All

Singular Program-Level Focus Inhibits Strategic Resource Allocation

Efficient and effective COE unit operation requires COE leaders to guide marketing decision making not only at the level of individual programs, but also to consider the allocation of marketing resources across the overall portfolio of programs. Marketers should focus their investment and effort in programs with the greatest opportunity for growth, but often follow one-size-fits-all policies to allocate their budgets, invest in programs based on historical performance rather than future opportunity, or over-invest in the highest- and lowest-performing programs. Without a disciplined methodology to identify programs with the greatest opportunity for growth, COE and marketing leaders cannot maximize enrollments across the entire portfolio.

EAB University Marketing Budget...

| Program | Maturity | Enrollments | Anticipated Revenue | Marketing Allocation |
|---------|----------|-------------|---------------------|----------------------|
| A | Launch | 0 | \$250,000 | 20% 1 |
| B | Launch | 0 | \$100,000 | 20% |
| C | 3 years | 40 | \$400,000 | 15% 2 |
| D | 5 years | 3 | \$70,000 | 15% 3 |
| E | 3 years | 35 | \$350,000 | 10% |
| F | 1 year | 12 | \$120,000 | 10% 4 |
| G | 2 years | 23 | \$270,000 | 10% |

“I approve our marketing budget year after year and I’m uncertain about whether we should allocate more or less to different programs. They’re all crying for money, but which ones will be most benefited by more marketing?”

Dean
Private Research University

...Presents Myriad Missed Opportunities to Reallocate Resources:

- 1** Unit policy mandates all new program launches receive 20% marketing investment
- 2** Marketer instinctively invests based on past performance, but overlooks upcoming market saturation
- 3** Dean pressures marketing to save long struggling program with increased investment
- 4** Strong programs with promising opportunities for growth overlooked or restrained by steady-state investment

Some budget policies follow a one-size-fits-all approach that allocates a fixed percentage of marketing dollars even after certain programs start to demonstrate diminishing returns or marketing campaigns have saturated the market. When marketers do modify the amount of time and money they invest on a program-by-program basis, those decisions often rely on performance data from previous years and do not account for market trends or capacity issues that may indicate greater or lesser opportunity for that program to grow enrollments with marketing assistance. COE leaders may invest large amounts of time and money in struggling programs that no longer have a market to serve. Other strategies focused on high- and low-performing programs miss opportunities to identify slow growth or steady state programs that could grow significantly with additional marketing investment.

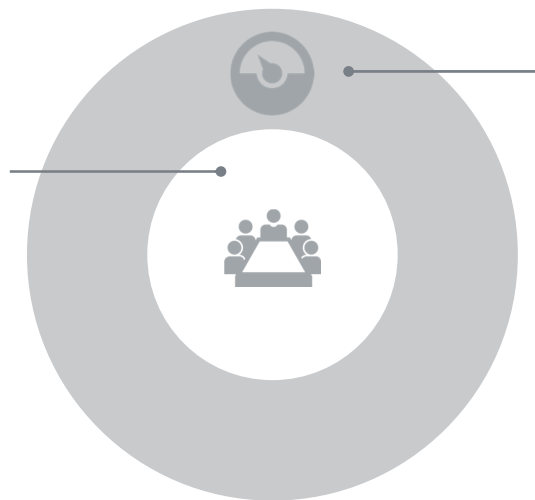
Marketing Across the Program Lifecycle

The marketing and recruiting breakthrough practices profiled in the following pages are the product of over 150 research conversations with experts both within and outside higher education. The COE Forum's research this year subdivides into two broad categories, marketing before launch and calibrating the portfolio, each organized into three sub-sections that profile relevant best practices.

1

Marketing Before Launch

- Formalize marketing's central role in new program ideation and launch
- Partner with faculty to systematically gather program- and student-specific insights
- Create a culture of experimentation to assess new program and marketing ideas before implementation



2

Calibrating the Portfolio

- Identify programs with the greatest potential for growth and diagnose barriers to growing program enrollments
- Cultivate external and internal partnerships to identify opportunities to improve performance across all programs
- Allocate resources to maximize opportunities for growth

Part 1:

Prior to launch, unit and program leadership must formalize marketing's role in program ideation and launch. Further, COE leaders must work to create a culture of experimentation to assess new program ideas and marketing strategies before implementation, and partner effectively with faculty to gather program and student insights.

Part 2:

After launch, COE leaders must partner with the marketing team to identify programs with the greatest potential for growth, diagnose barriers to growing program enrollments, cultivate internal and external partnerships to identify holistic solutions to enrollment growth challenges, and allocate resources strategically to maximize growth opportunities.

Part I: Marketing Before Launch

Integrating Marketing Research and Strategy Prior to Launch

1

Integrating Marketing in Program Development

- Practice 1: Peer Advisory Committee
- Practice 2: De-jargoned Service Request
- Practice 3: Marketing-Led Expectation Setting Bootcamp
- Practice 4: Prelaunch Accountability Agreement

2

Gleaning Actionable Insights from Faculty

- Practice 5: Faculty Insight Questionnaire
- Practice 6: Prospective Student Journey Walkthrough

3

Testing Program Viability and Channel Effectiveness

- Practice 7: Multichannel Segmentation
- Practice 8: Marketing Channel Innovation Fund
- Practice 9: Low Investment Program Test Launch

Part II: Calibrating the Portfolio

Diagnosing Enrollment Growth Barriers After Program Launch

4

Elevating Faculty Understanding of Program Performance

- Practice 10: Portfolio Performance Dashboard
- Practice 11: Pipeline Performance Consultations

5

Gathering Real-Time Market Insight

- Practice 12: 360-Degree Program Assessment Questionnaire
- Practice 13: Frontline Staff Focus Groups
- Practice 14: Actionable Employer Advisory Boards
- Practice 15: Student Feedback Solicitation Form
- Practice 16: Action-Driven Insight Sheets

6

Surfacing Programs for Strategic Investment

- Practice 17: Bias-Free Program Prioritization Matrix



Marketing Before Launch

Ensuring Marketing's Central Role in Program Development

PART



Profiled Units in Brief

Marketing Before Launch

Though every COE unit structures its operations and offerings in a slightly different way, many commonalities exist regarding the marketing team's essential role in informing program positioning and strategy prior to launch. To provide additional context for the practices that follow, please see below a brief description of each profiled unit's structure and responsibilities.

1 Mizzou Online

Shared service unit assisting campus faculty design, develop, and deliver graduate, undergraduate, and certificate programs online



2 University of South Florida Innovative Education

Shared service unit offering face-to-face and online degree completion, certificate, workforce development, lifelong learning, and pre-college programs



3 Florida International University Online

Shared service unit that facilitates the online delivery of undergraduate and graduate credentials, oversees access to instructional design and related support services



4 University of Wisconsin-Madison Continuing Studies

Shared service unit offering face-to-face and online flexible, professional degree programs as well as noncredit professional development, certification, and personal enrichment courses



5 University of Virginia School of Continuing and Professional Studies

Independent unit, self-supported, offering face-to-face and online bachelor's and graduate programs, and a number of certificate programs and individual courses



6 Southern Methodist University Continuing and Professional Education

Independent unit, self-supported, that may only deliver online and face-to-face noncredit professional development and personal enrichment courses and certificate programs





Integrating Marketing in Program Development

SECTION 1

- Practice 1: Peer Advisory Committee
- Practice 2: De-jargoned Service Request
- Practice 3: Marketing-Led Expectation Setting Bootcamp
- Practice 4: Prelaunch Accountability Agreement

Getting Faculty to See the Bigger Picture

Marketing Typically Lacks Formal Role in Program Development

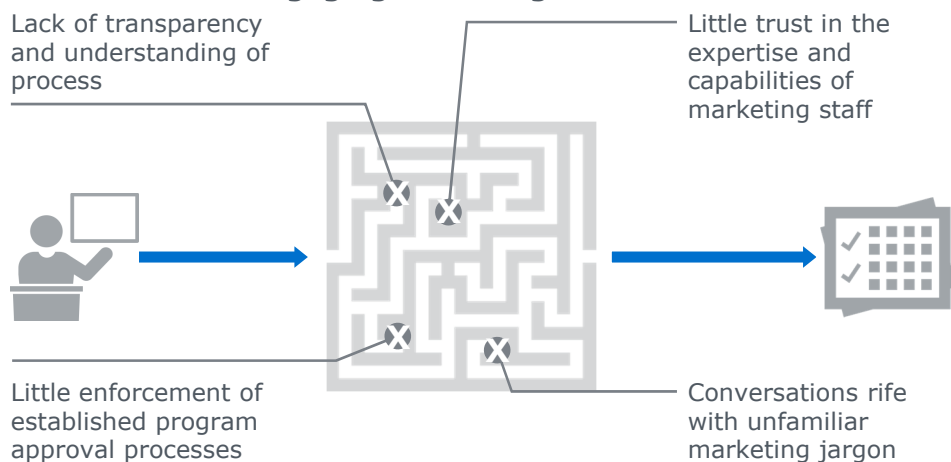
Most institutions have standard, often multistage program development and approval processes, but too often marketing leaders are involved only after a program receives final approval for launch. Even at institutions where marketing is involved earlier in program ideation, a lack of understanding about the value the marketing team can add to the process, coupled with natural skepticism about external data and opinions on the part of the faculty members, can present numerous roadblocks to productive collaboration.

“

The CMO needs to be absolutely involved in new-product development. The marketing role doesn't start with the creative brief. Marketing needs to start very far upstream in new-product development. Marketing must capture the customer lens, owning the customer insights that lead to successful new-product commercialization.”

Mark Chinn
CMG Partners

Common Roadblocks to Engaging Marketing



Faculty members may not fully understand or trust marketing's expertise and understanding of the prospective student profile, and depend instead on their own knowledge. Marketers may over-rely on technical language to communicate their value and insights, losing their academic partners in the process. Lastly, and perhaps most detrimental, the informal collaborative networks and processes in place at many institutions hold no one individual or group ultimately responsible or accountable for program success.

Building Internal Awareness at Scale

Alleviating Faculty Skepticism Through Collaborative, Peer-Based Forum

Successful partnerships between marketing and academic departments are often predicated on informal connections and relationships that develop organically. However, at most institutions standing committees and meetings of faculty and program leadership convene regularly to cover everything from program development processes to discussions of challenges related to online delivery. These otherwise academic-focused meetings provide an unexpectedly rich opportunity for marketing to learn more about their academic partners' needs and position themselves to help solve faculty and program challenges.

Online Program Peer Groups...

- Three groups identify shared challenges, brainstorm solutions, and disseminate best practices
- Approximately 34 online education leaders, senior administration and service unit staff
- Representation from struggling and successful online programs
- Groups convene two to six times per year



...Accrue Unexpected Benefits for Marketing

Stories from "Faculty Like Me"

Faculty conversations about program-specific and collective marketing needs trigger interest in collaborating on recruitment strategies.

New Level of Trust

Growing understanding of goals and methods increases trust, which results in marketing's increased access to previously unavailable institutional data.

Issue Identification

Creates an environment for crowdsourcing advice and recommending opportunities for new services to address enrollment challenges.



At Mizzou Online, one standing committee of online program directors provides the venue for program leadership and faculty members to identify shared challenges and successes as well as brainstorm solutions. Though Mizzou Online's marketing director could not sit in on these meetings, by connecting before and after with faculty representatives in attendance she realized three unexpected benefits. First, she could hear directly from faculty members about program-specific and unit-wide marketing needs. Second, by demonstrating her willingness to learn from, and respond to, faculty needs she gained her academic partners' trust, which encouraged future partnership. Lastly, she could craft interventions and solutions based on direct, demonstrable faculty need.

A Ripple Effect for Marketing

One Program’s Success Story Elevates Marketing’s Rep Campus-Wide

One such example of a successful marketing-academic department partnership concerned an experimental shared-investment pilot program undertaken by the marketing department and one of Mizzou’s largest health sciences academic departments. This partnership generated 2,000 new qualified leads for the struggling department, but that collaboration had not been shared beyond the individuals and groups involved due to the decentralized structure endemic to many higher education institutions.

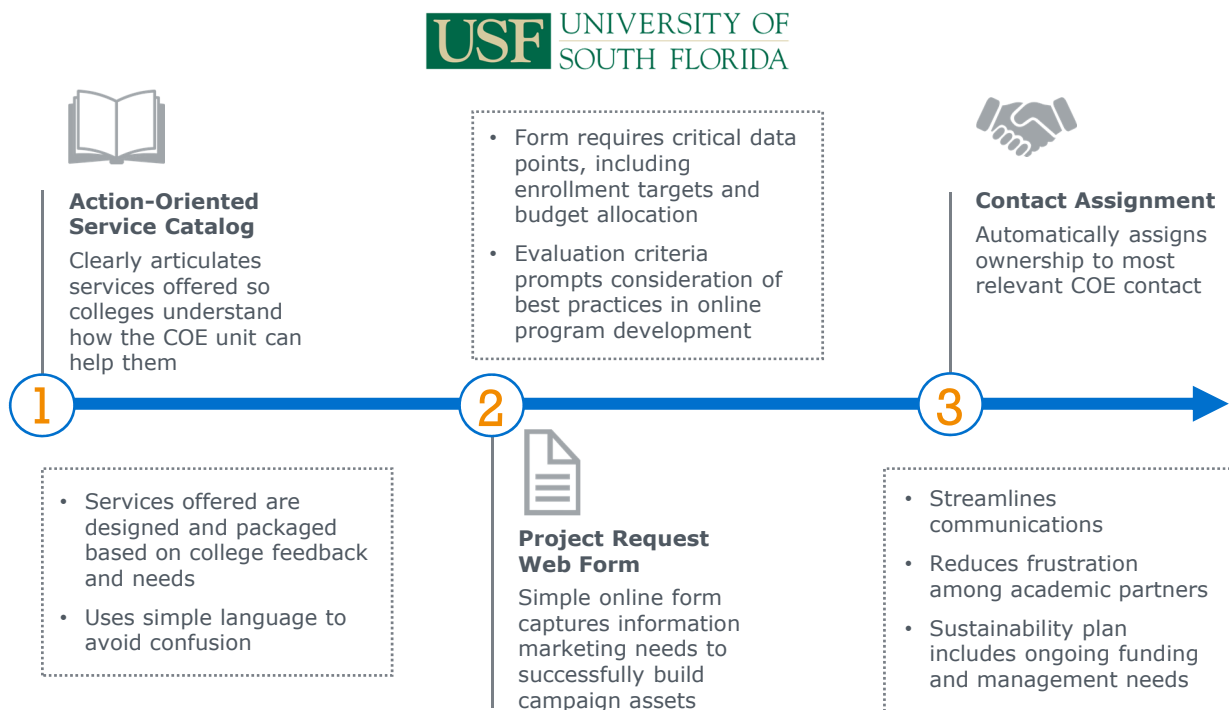


Mizzou Online’s director of marketing asked that representatives from the academic department, in attendance at the meeting of online program directors, share the details of the partnership at their next gathering. Her logic, borne out across the following months, was that her academic partners were simply unaware of marketing’s capability to assist in meeting enrollment goals, and thus did not connect with the marketing team to address enrollment challenges. Upon hearing directly from program leadership about enrollment concerns the marketing team was able to compile educational resources about marketing’s capabilities and available support services, and ultimately met one-on-one with numerous program chairs and faculty members to brainstorm opportunities for future strategic collaboration.

Simplifying Service Requests

Increasing Information Collection and Clarifying Roles

Providing a single, clear point of access to marketing's services and support for faculty members and program leadership is a necessary prerequisite for effective collaboration. At the University of South Florida's Innovative Education division, the executive director of marketing and recruitment took a note from central marketing and IT services and brainstormed a web-based service catalogue and marketing project request form. The system has three components that offer academic units no shortage of support options.



The system solves multiple problems that commonly stymie marketing's integration in program launch: service offerings appear in the voice of the academic partner rather than the marketer, the materials are web-based and easy to distribute and advertise, and the project request form requires academic partners to complete multiple information fields prior to submission. This last component ensures that requestors provide marketing with the information required to position and promote a new or existing program with enough time to effectively do so.

Faculty-Friendly Service Descriptions

Communicating with Campus Stakeholders in Language They Understand

Despite the imperative to provide academic partners with easy access to marketing's services, many marketers rely on jargon-laden descriptions of marketing's capabilities to communicate their services to academic units. When faculty and program leadership cannot decipher marketing's services, they become much less likely to seek support from the marketing team during program development and launch. The University of South Florida's Innovative Education unit hopes to organize their service offerings according to the needs of their academic "clients" in a partner-facing web intake form.

Whereas COE Staff Think in Terms of Organizational Structure and Functionality...

✘ We have seven highly trained instructional designers on staff

✘ We execute comprehensive market research reports

✘ We provide holistic marketing strategy consultations

✘ We offer rigorous online pedagogical training seminars



...Academic Partners Think in Terms of Faculty Needs and Programmatic Improvements

✔ We can help you transition your face-to-face course to online

✔ We can help you determine whether prospective students are interested in your new degree

✔ We can help you develop a strategy to increase enrollments in your program

✔ We can help your faculty members to teach effectively in an online environment

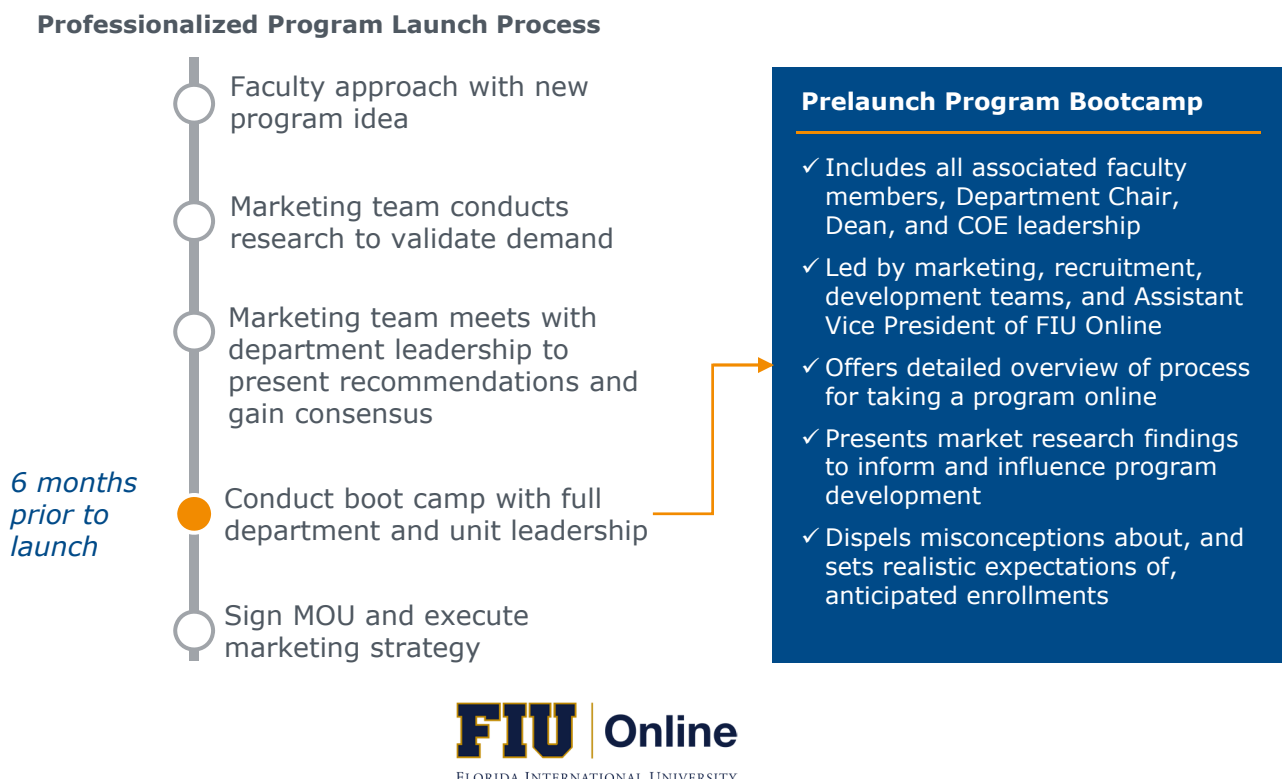
This translation exercise solves multiple problems for the marketing team within Innovative Education. First, it ensures that academic partners understand marketing's capabilities and ask for help accordingly. Second, it codes requests so the marketing team can assign a main point of contact within the marketing team and streamline future communications with the requestor. Client education and streamlined communication with a consistent main point of contact within the Innovative Education unit help to make partnership easier for any type of project, from brainstorming lead generation strategies to fully overhauling a program's competitive positioning. This ease of partnership paves the way for repeat collaboration in the future.

Please see the "Marketing Services Request Form Builder" on page 86 for further guidance.

Setting Prelaunch Expectations

Consultative Strategy-Setting Avoids Post-Launch Pitfalls

Marketing and academic teams often have different expectations about whether, when, and how the marketing team should be involved in new program development. Unit and program leadership should consider the marketing team a strategic partner and stakeholder in the program development and launch process, rather than an end-stage service provider. At FIU Online the marketing and recruiting team has codified this position through a mandatory marketing-led bootcamp that gathers all program and unit stakeholders together in the same room to discuss the logistics of, and set expectations regarding, new online program launch.

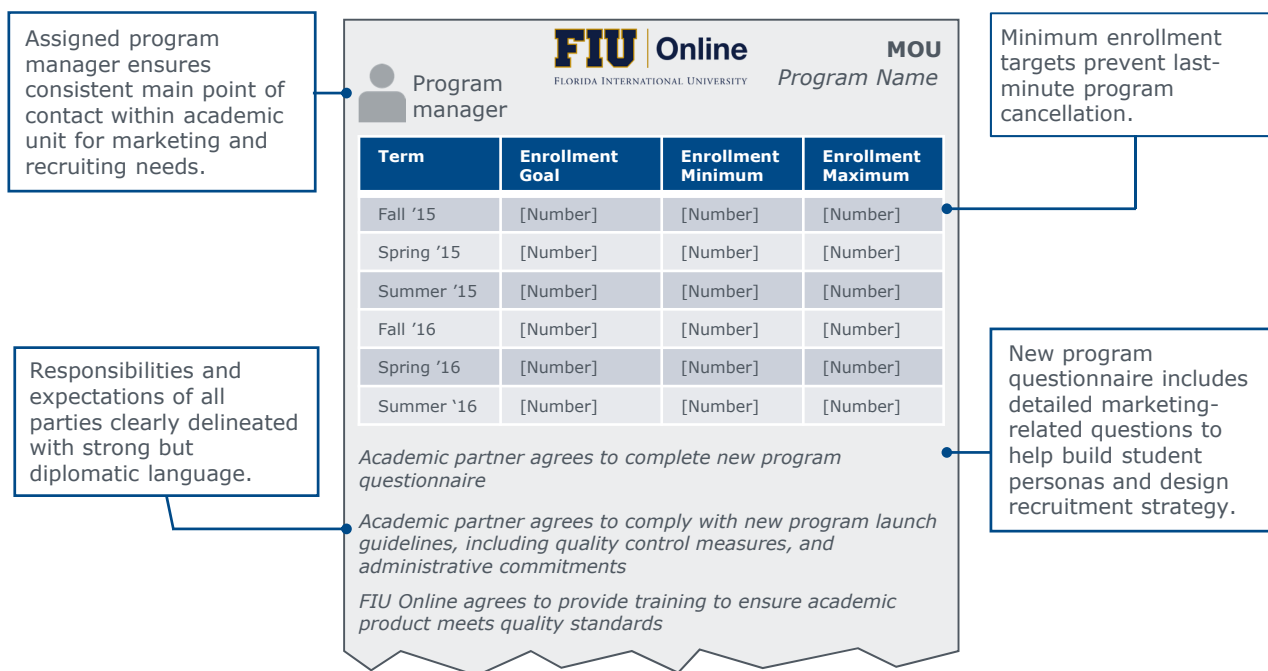


Because FIU's academic departments and programs can look outside the institution to external vendors for marketing support, FIU Online's team uses this professionalized, standardized process to position itself as the go-to expert on campus. Prior to the expectation-setting bootcamp, conducted at least six months prior to program launch, the team conducts extensive market research, and has met with department leadership to ensure faculty commitment and buy-in. Within the session itself, every stakeholder involved in the program gathers in the same room while the marketing and recruiting team presents financial projections, solicits enrollment targets, and walks through a detailed timeline of launching an online program. To ensure accountability, all new online program launches must adhere to this bootcamp process or lose marketing support and investment from the team. This accountability is codified in a formal memorandum of understanding.

Getting Everyone on the Same Page

MOU Sets Expectations and Codifies Accountability

Following the bootcamp's completion, FIU Online's marketing and recruiting team requires all parties to sign a memorandum of understanding, codifying each group's expectations and responsibilities for successful program launch. The MOU stipulates a number of conditions: a consistent main point of contact within the academic unit, that faculty members complete a questionnaire designed to solicit marketing-specific program insights, and minimum and maximum enrollment targets to prevent last-minute program cancellations.



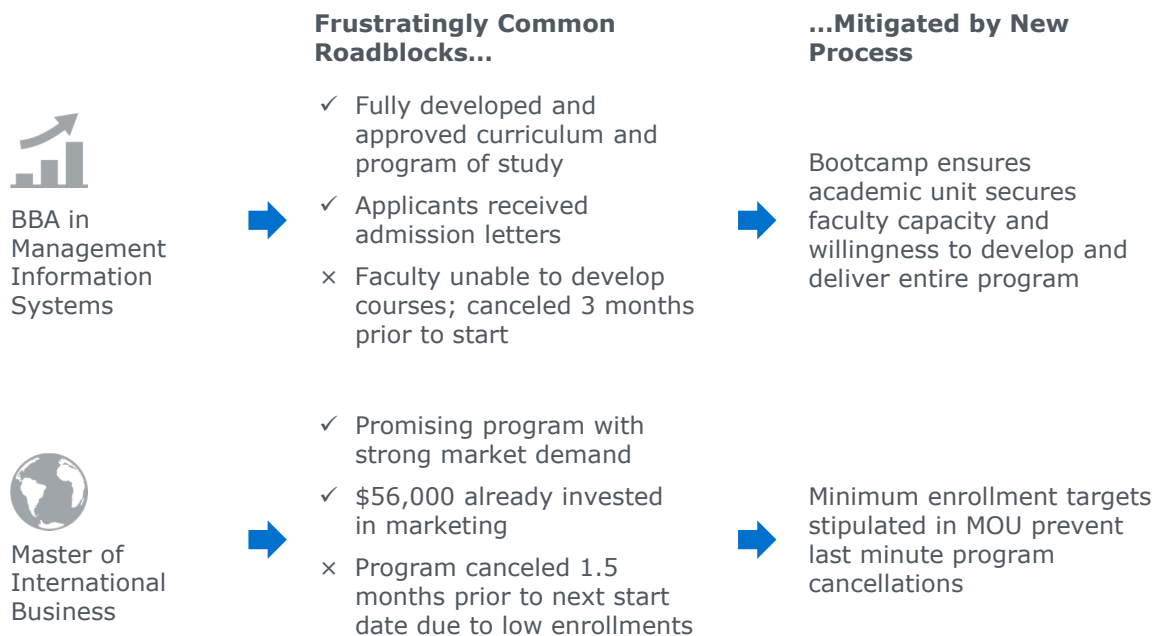
Though the formal nature of the MOU may not fit with the processes and culture found at some COE units, many COE leaders find the document helps to increase accountability and collective trust between academic and marketing partners, and solidifies the campus community's perception of marketing as a strategic partner in program development and launch rather than simply an end-stage service provider.

Please see the "Memorandum of Understanding Template" on page 92 for further guidance.

Avoiding the Pitfalls...and the Blame Game

Bootcamp and MOU Prevent Misunderstanding

The bootcamp and MOU not only serve to educate on-campus stakeholders and academic partners about marketing's crucial role in new program development, these processes serve as critical milestones to minimize the risk of expensive failed program launches. Two examples below illustrate the negative consequences of ineffective collaboration, misaligned expectations, and loose accountability in the program launch process. Aborted program launches deplete marketing's scarce resources and damage unit brand perception and reputation in the market. FIU Online's formalized program launch process and MOU now serve to prevent such expensive missteps.



In the first example, COE and program leaders had fully developed and approved a curriculum for a new online BBA in Management Information Systems, and had begun to accept and approve applications for enrollment in the program. Unfortunately, faculty leaders in the program were unable to develop the courses in time and had to delay the program's start. The bootcamp process could have ensured that the academic unit had the resources in place to offer the program on time. In the second example, program leadership decided to cancel the start of a new Master of International Business program due to lower than expected enrollments. Unfortunately, the marketing team had already invested \$56,000 of its own budget in the promising program. The minimum enrollment targets stipulated in the MOU could have prevented this last minute cancellation.

Integrating Marketing in Program Development

Key Lessons for Implementation





Gleaning Actionable Insights from Faculty

SECTION 2

- Practice 5: Faculty Insight Questionnaire
- Practice 6: Prospective Student Journey Walkthrough

Too Little Too Late

Faculty Want to Help, but Are Often Uncertain How and When to Do So

Faculty members possess essential knowledge of a program's content, its competitive strengths and value, and the students that it aims to serve. However, faculty often lack an understanding of what information is or is not helpful to support marketing, do not deliver information to marketing staff with enough time for the team to incorporate that information into their marketing strategy, and can deliver information inconsistently or become frustrated by a lack of feedback from the marketing team. Marketing must provide faculty members with the tools and a forum to easily translate their program-level insights into marketing insights.



Faculty members possess key information to inform marketing strategy, but **lack understanding of what is or is not helpful**



Marketing staff **given inadequate time** to solicit faculty insights and incorporate that information into marketing strategy



Inconsistent information submission and lack of feedback inhibit the formation of productive partnerships between marketing and faculty



"I recognize that we (faculty members) share responsibility for enrollments and have a key role to play in informing marketing and recruiting. I really just don't know what information is helpful, when and with whom I should be communicating, and through what channels."

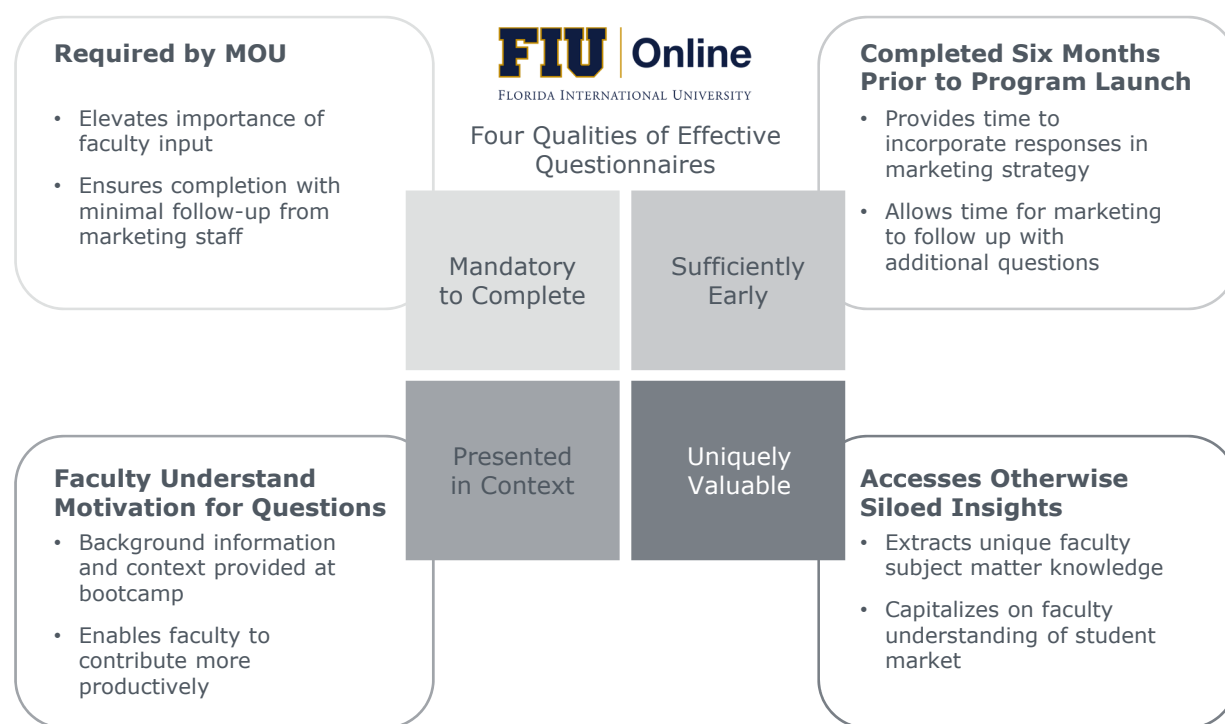
*Program Director
Midsized Research University*

By helping their academic partners to understand what kinds of information are most useful for marketing and when that information should be delivered, the marketing team can better ensure those insights contribute to an effective marketing campaign. Two practices in the following pages offer examples of how to facilitate this information sharing prelaunch.

Don't Let Faculty Insights Go to Waste

Questionnaires Build the Foundation for Competitive Marketing Plans

Questionnaires remain the easiest, most straightforward way to glean actionable marketing insights, such as student personas and competitive intelligence, from faculty members and subject matter experts. However, including the correct questions and ensuring faculty complete the questionnaire in a timely manner present challenges. At FIU Online, the mandatory MOU included in the marketing and recruiting team's program launch process requires program faculty and leadership to complete an insight questionnaire, the components of which are illustrated below.



Timely completion requires that faculty members understand the questionnaire's value and direct impact on program performance, making it incumbent upon marketers to explain how the questionnaire responses will be used. Next, mandatory completion at least six months prior to program launch, guaranteed through an MOU or other such accountability mechanism, ensures that marketing receives the right information in time to meaningfully inflect the recruitment campaign's strategy. Lastly, customizing the questionnaire to target insights that only academic partners possess saves faculty time and helps to facilitate timely completion.

Please see the "Prelaunch Faculty Program Questionnaire Builder" on page 96 for further guidance.

Pressure-Tested Marketing Strategy

Faculty Input Confirms Approach and Mitigates Post-Launch Blame Game

While receiving insights from faculty members prior to program launch allows marketing to develop a more informed, targeted recruitment campaign strategy, the danger of insights getting lost in translation persists. Marketers might misinterpret faculty input and develop a marketing mix skewed too heavily towards one channel, or different faculty members might report conflicting competitive information. After soliciting marketing insights from faculty members and program leadership, marketers in USF’s Innovative Education unit reconvene all academic partners to review the marketing mix developed from faculty insight and solicit any final input and adjustments.



Marketing Walks Program Leadership Through Prospective Student Journey

| | |
|-------------------------|---|
| 1. Prospective Students | Google Adwords, SEO, Email Content, Print Collateral, Social Media, List Buys |
| 2. Inquiries | Events, Email Content, PPC |
| 3. Applicants | Personal Calls, Events, Email Content |
| 4. Admits | Personal Calls, Events, Email Content, Social Media |
| 5. Confirms | |
| 6. Enrolled | |
| 7. Retention | |



Benefits for Marketing

- Receive input on ad placement, imagery, copy, and keywords
- Identifies overlooked gaps or mistakes made
- Provides final quality assurance
- Avoids post-launch blame game by soliciting faculty input



Benefits for Faculty

- Empowered to positively impact program enrollments through contributions to marketing
- Understand importance of pre-launch tasks

This approach allows the marketing team to pressure test conceptual versions of the marketing mix and campaign strategy prior to full investment, giving faculty opportunities to provide additional input, quality assurance, and approval. It also illustrates for faculty members the value and application of their responses to insight gathering tools like questionnaires, improving the response rate and likelihood of completion in the future.

Integrating Marketing in Program Development

Key Lessons for Implementation





Testing Program Viability and Channel Effectiveness

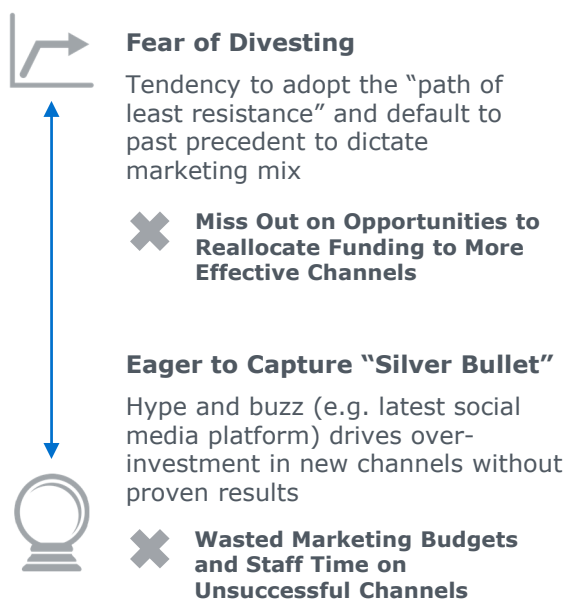
SECTION 3

- Practice 7: Multichannel Segmentation
- Practice 8: Marketing Channel Innovation Fund
- Practice 9: Low Investment Program Test Launch

Investing at the Extremes

Marketing Channel Strategies

Marketers must make difficult decisions about how to allocate their scarce resources, and face two common challenges to doing so effectively. First, a fear of divesting from current marketing strategies leads marketers to either miss opportunities on more effective channels, or fall victim to the sunk cost fallacy and believe that investments in unsuccessful channels merit continued support. Second, eagerness to capitalize on the latest trends and technologies can lead to inefficient use of time and money. The explosion of channels and technologies require marketers to constantly experiment with and adjust the mix for each program in the portfolio. Experimentation is critical not only in higher education but across industries and sectors.



”

Culture of Experimentation

“Marketers feel the pressures, and in some cases understand what they should do, but lack the confidence that they will succeed. They’re anxious about understanding ahead of time what makes for good creative and smart digital strategies, managing complexity, and measuring real impact. Plus, so much of marketing today is a moving target. **You have to get in there and play and learn. The challenge is getting comfortable with risks. Set aside a portion of budget—10 to 20%—and really try new things.**”

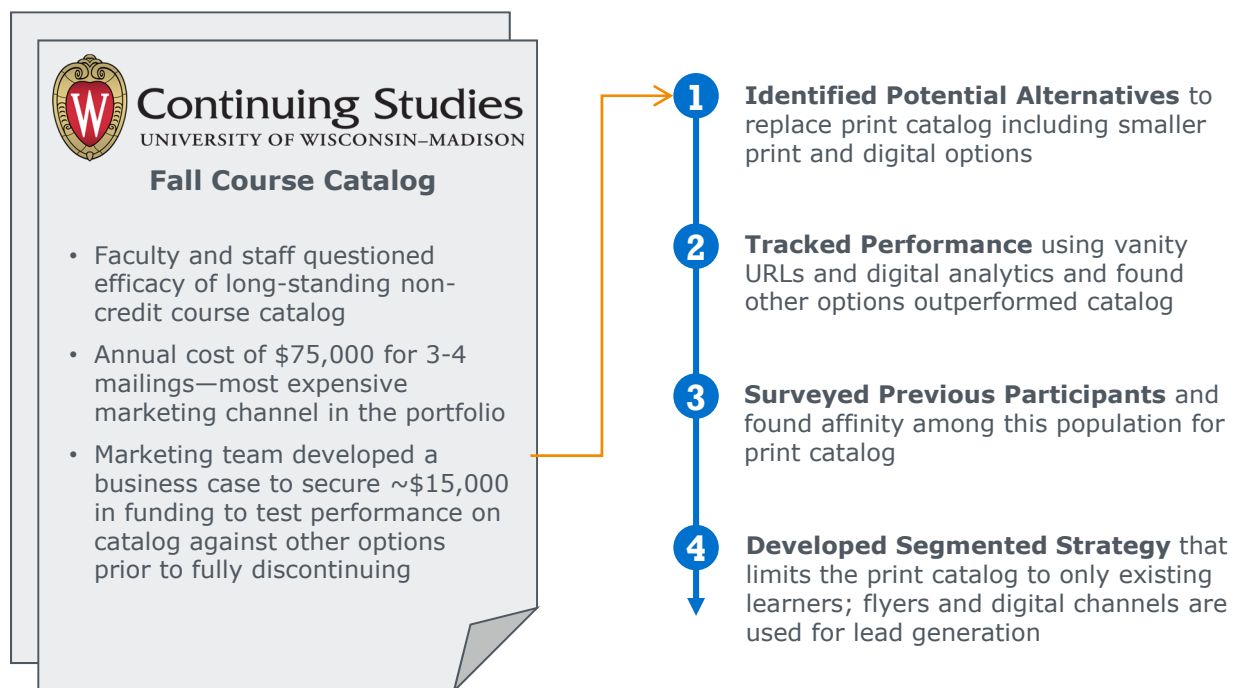
*David Edelman
Global Co-Leader, McKinsey Digital,
McKinsey & Company*

Unfortunately, experimenting with and testing marketing strategies is more easily said than done for marketers who work along the risk spectrum illustrated above. Buoyed by decades-long growth in enrollments, many marketers have not had to critically examine their marketing mix and thus lack an understanding of what channels drive inquiries and applications, and which do not. Stagnating and declining enrollments generate anxiety among these marketers of divesting in any one strategy for fear of losing further ground. However, ambitious enrollment and revenue goals make over-reliance on traditional channels and activities riskier, and new student behaviors demand a new marketing playbook.

Is Traditional Print Collateral Dead?

Robust Marketing Test Results in Smart Segmentation

As the media environment and student search behavior continues to shift, unmonitored marketing mixes can be burdened by costly, low ROI strategies. In the case of print materials, especially expensive print course catalogs, these expenditures can constitute large portions of the marketing budget. Progressive marketing organizations, like the Integrated Marketing Communications team at the University of Wisconsin-Madison's Continuing Studies division, conduct rigorous, disciplined, and regular evaluation of the channels they use to promote programs in the portfolio, and constantly seek to invest their resources only in channels with the greatest demonstrated return on investment.

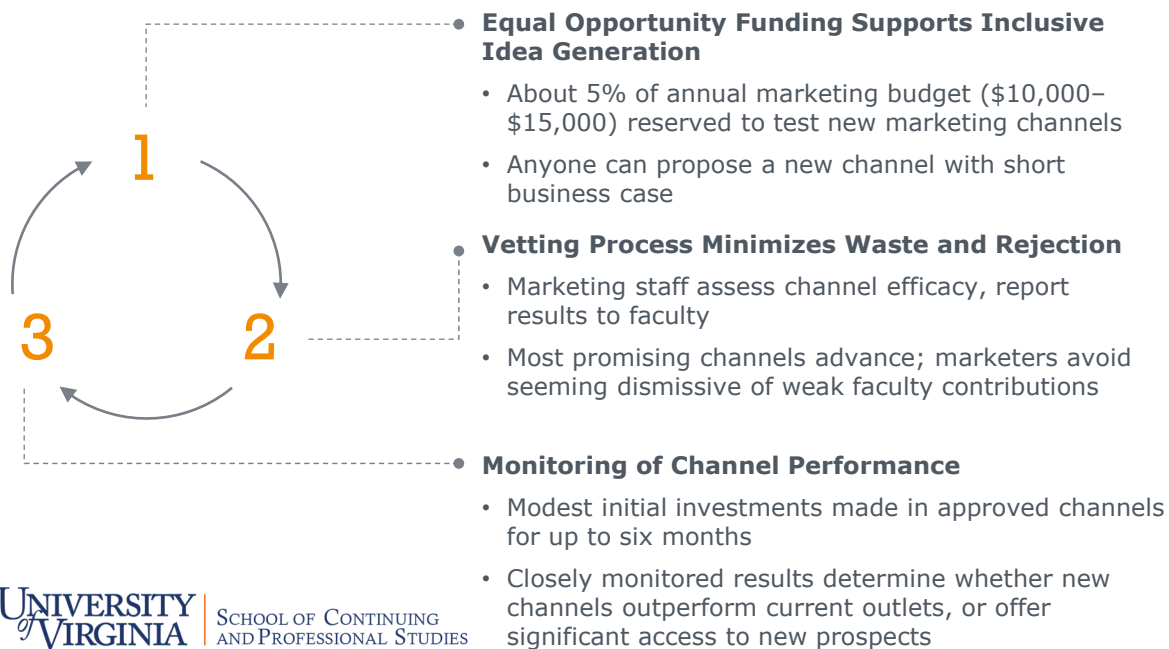


The Integrated Marketing Communications team at the University of Wisconsin-Madison Continuing Studies ran a longitudinal test of its largest single marketing expenditure, a printed course catalog, using supplementary funds secured for the occasion through the budget office. Encouraging prospective student participation using a giveaway contest of monetary course vouchers, the team monitored traffic generated by the full print catalog, a shortened bifold, and digital materials. A supplementary survey of previous student participants coupled with the test's analytics revealed that, though digital materials outperformed the print catalogue among new prospects, current and past students maintained an affinity for the large catalogue, which drives a disproportionate number of repeat enrollments. The team was able to use their findings to scale back production and distribution of the catalogue and increase digital promotion to save money and ultimately increase enrollments over time.

A Measured Approach to Experimentation

Dollars Earmarked to Check Faculty (and Marketer) Assumptions

While additional investment can support one-time tests of existing marketing strategies, progressive institutions also seek to conduct ongoing experiments of new and emerging strategies. The explosion of media channels has increased opportunities to reach prospective students, but not every channel offers access to the right profiles of prospective students. Marketers require a disciplined process to evaluate new marketing channels and strategies, or risk wasting both time and money on channels ill-suited to the particular programs in their portfolios. At the University of Virginia's School of Continuing and Professional Studies, the marketing team has set aside dollars in the marketing budget expressly for experimentation and innovation.



The School of Continuing and Professional Studies' marketing director reserves approximately 5% of her annual marketing budget for small-scale tests of new marketing channels and strategies. These funds are available to anyone on campus, faculty or staff, and require only the submission of a short business case providing a rationale for the investment. The open-access, first come first served nature of the funds' disbursement helps to crowdsource new ideas from inside and outside the marketing team, while the small funding amount minimizes the investment risk. The process places a check on both faculty and marketer assumptions about what strategies and channels will provide the greatest benefit, but allow the unit to aggressively innovate and pursue new marketing strategies on a regular basis.

Please see the "Experimental Marketing Funds Business Case Builder" on page 102 for further guidance.

Rightsizing Investment in the Portfolio

Two Case Studies Highlight Benefits of Experimentation

UVA's inclusive yet disciplined experimentation allows the unit to both fail quickly and invest incrementally. In the first example, the unit's outreach manager proposed a promising strategy to promote the School of Continuing and Professional Studies on highly visible military media. Following initial investment and tracking, the marketing team observed low lead quality and conversion, leading them to end the test and reallocate the funds after six months. Often, the ability to learn what strategies are not effective can be as valuable as learning what strategies are.



Failing Fast Prevents Further Investment

- Outreach manager suggested unit-level marketing on statewide military websites and publications
- Business case proves opportunity to generate new leads with new audience



- Marketing team invests \$5,000 over six months
- Closely monitors web traffic and lead generation



Low lead quality and conversion rates from publication end test after six months



Incremental Funding After Channel Proves Effective

- Local professional organization journal represents promising new marketing channel for HR Management Degree
- But sales vendor proposes full service investment of \$20,000



- \$1,500 invested in print for six months
- Additional \$3,000 invested in digital after print ads met or exceeded performance of other channels



Successful tests lead to sustaining \$5,000 investment from primary marketing budget

In the second example, preliminary investigation of a widely circulated professional journal led to a high price quote from the journal's sales associate. Explaining her policy, the marketing director invested a much smaller amount and tracked the efficacy of her ads. After six months of above-benchmark lead generation and conversion performance, additional funds were invested incrementally, leading to a sustained investment from the marketing budget. As this example illustrates, experimental funding will roll over into the following year should a test prove successful, and SCPS's marketing manager may then advocate for a commensurately increased budget. In this way, the marketing team is able to optimize its spend on various marketing channels from the bottom up, rather than overinvesting and falling victim to the sunk cost fallacy.

Testing Faculty-Initiated Program Proposals

Assess Demand Through Short Course Prior to Expensive Launch

Though new program launches represent the cornerstone of many COE units' growth strategies, they require large investments of time and money. In addition to market research, unit and marketing leaders can and should test demand for new programs and use early inquiry and application data to shape the full program launch. The tiered new program launch process at Southern Methodist University's Continuing and Professional Education (CAPE) division offers an innovative model for the marketing team to track prospective student demand in real time and shape program components accordingly.

New Program Proposal Testing Process...



SMU | CONTINUING AND
PROFESSIONAL EDUCATION



...Presents Myriad Advantages for Marketing



Incoming inquiry data refine existing prospect personas and marketing messages for future recruitment efforts



Course enrollment list provides ready-made cohort for full certificate launch, and blueprint for additional marketing



Tiered roll-out pressure tests initial proof of concept and minimizes investment in non-viable programs



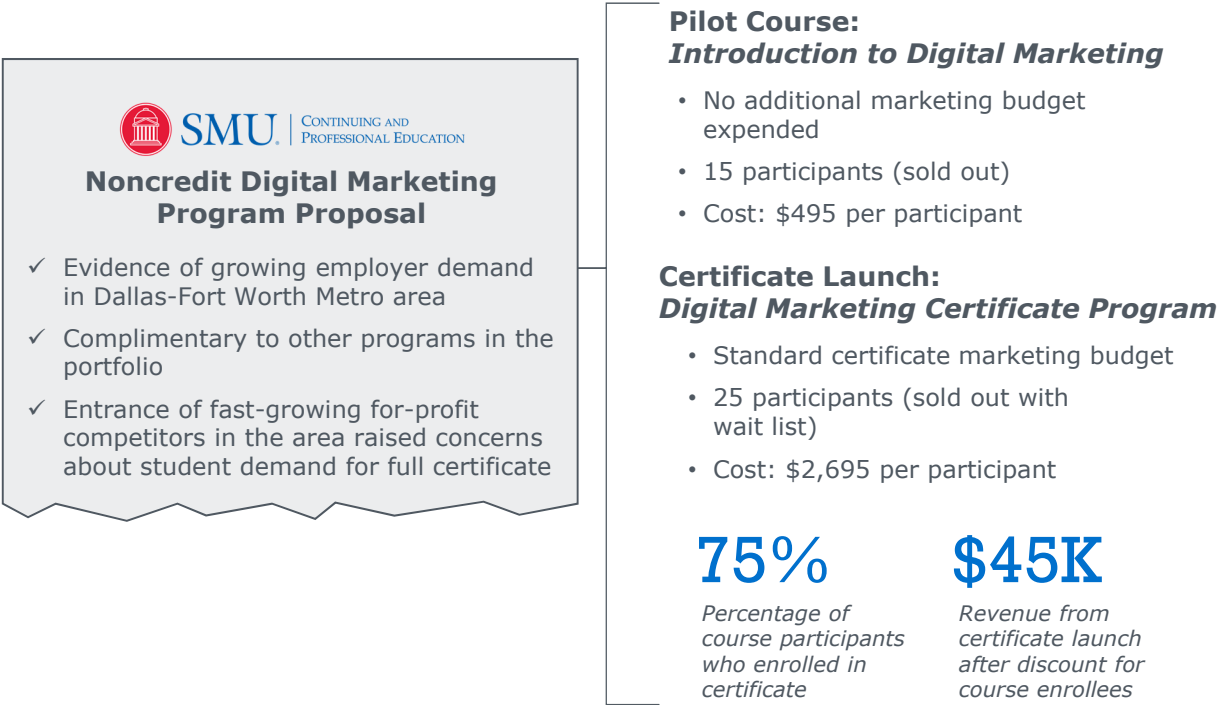
Interest from particular positions or companies informs future program development

To mitigate the risks associated with developing expensive new course content, division leadership develops and launches one course at a time, tracking the market's reaction before deciding whether to roll out subsequent courses and create a full certificate. In addition to shielding the division of wasted investment in untested program concepts, the marketing team realizes myriad benefits from this tiered launch process: the ability to refine prospect personas in response to incoming inquiries, using course participants to build a ready-made cohort for the full certificate launch, and translating interest from certain positions and employers to inform future program development.

Lastly, since the division offers noncredit courses and certificates largely in partnership with local professionals and subject matter experts, this tiered process allows CAPE leadership to test new instructors in the controlled environment of a single course before hiring them on to teach in an ongoing capacity for a full certificate.

Tiered Rollout Yields Successful Launch

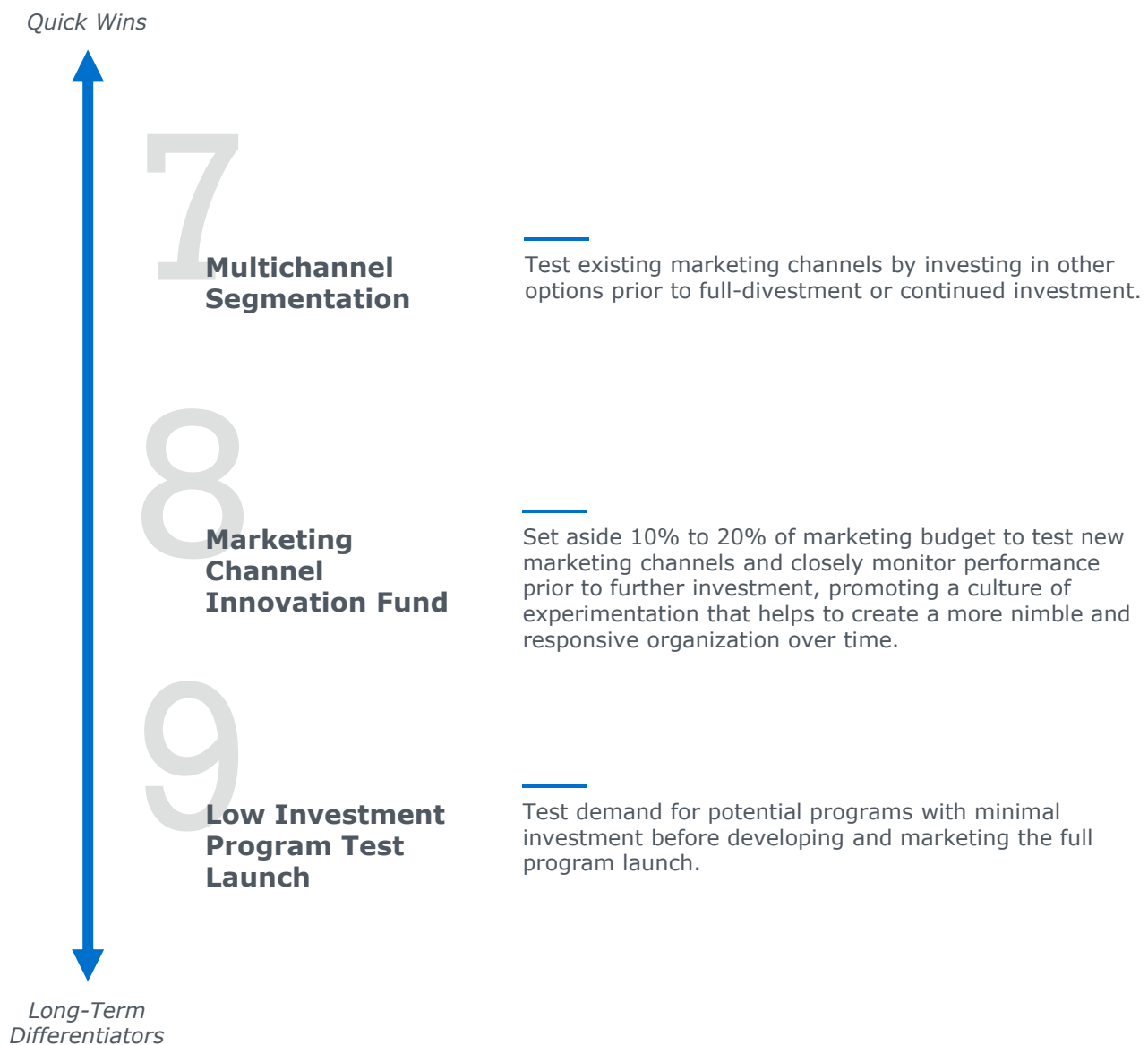
Despite growing evidence of regional employer and student demand for digital marketing skills in the Dallas-Fort Worth metropolitan area, the proliferation of non-academic competitors with existing offerings in the field put pressure on any new academic program launched within that discipline. The CAPE team used its tiered program launch and beta testing process to successfully develop and deliver a new digital marketing certificate in the highly competitive market by using a single proxy course to test demand prior to investment in full launch.



The CAPE team needed to test whether the SMU brand could withstand such competition, and so developed a single pilot course in digital marketing as a proxy for the full certificate program. The CAPE division prioritizes new courses and certificates for development that align with the unit’s existing program areas. This allows the marketing team to include the new offering in existing promotional materials, rather than having to design unique campaigns for each new launch. Further, discounts for the initial student cohort facilitate early participation and reenrollment, ensuring that marketers can collect enough market intelligence to inform the decision to launch a larger program. When the initial course sold out, supported by no additional marketing investment, CAPE leadership decided to move ahead with the full certificate launch. Of those participating in the pilot course, 75% enrolled in the full certificate, which now constitutes one of CAPE’s most successful programs.

Integrating Marketing in Program Development

Key Lessons for Implementation



Marketing Before Launch

Six Disciplines for Integrating Marketing into Program Development

The following six disciplines serve to summarize the preceding section, offering a summary encapsulation of the Forum's best practices for integrating the marketing function in program development and launch.

- 1 | Ensure that marketing is involved at least 12 months (ideally between 12 and 18 months) prior to program launch to inflect program design and positioning and to develop an effective marketing strategy to secure enrollments.
- 2 | Clearly communicate the risk of diminishing enrollment returns to academic partners who attempt to solicit marketing support with insufficient time until launch.
- 3 | Ensure marketing can beta test new program and channel ideas by earmarking a percentage of the budget and disciplining data collection in program pilots.
- 4 | Set aside time for an expectation-setting bootcamp with all relevant parties at least six months prior to launch.
- 5 | Clearly articulate services offered through academic partner-focused catalogs that use simplified language and streamline communications .
- 6 | Use mandatory, online, modularized questionnaires to formalize the solicitation and collection of faculty insights to inform marketing strategy.



Calibrating the Portfolio

Collaborating Effectively Post-Launch to Support Existing Programs

PART

II

Profiled Units in Brief

Calibrating the Portfolio

Though every COE unit structures its operations and offerings in a slightly different way, many commonalities exist regarding the marketing team's essential role in informing program positioning and strategy prior to launch. To provide additional context for the practices that follow, please see below a brief description of each profiled unit's structure and responsibilities.

1 Northeastern University College of Professional Studies

Independent unit, self-supporting, offering a range of professionally-oriented face-to-face and online programs from undergraduate certificates through doctoral programs



Northeastern University
College of Professional Studies

2 Ball State University Online and Distance Education

Shared service unit helping on-campus academic units deliver credit and noncredit programs at all credential levels online, as well as live courses at multiple satellite locations



3 The New School Continuing Education

Shared service unit that helps campus colleges and departments deliver credit and noncredit courses, certificates, executive education, and pre-college and summer study



4 Benedictine University National Moser Center for Adult Learning

Independent unit that oversees a number of satellite locations across the US that adapt and deliver main campus degree programs for adult and professional audiences face-to-face



5 Brandeis University Graduate Professional Studies

Independent unit, self-supporting, offering on-campus and online graduate degree and certificate programs



Brandeis University
Graduate Professional Studies

6 Georgetown University School of Continuing Studies

Independent unit, self-supporting, offering on-campus and online undergraduate and graduate degree and certificate programs, and doctoral and professional master's programs



GEORGETOWN UNIVERSITY
School of Continuing Studies



Elevating Faculty Understanding of Program Performance

SECTION 4

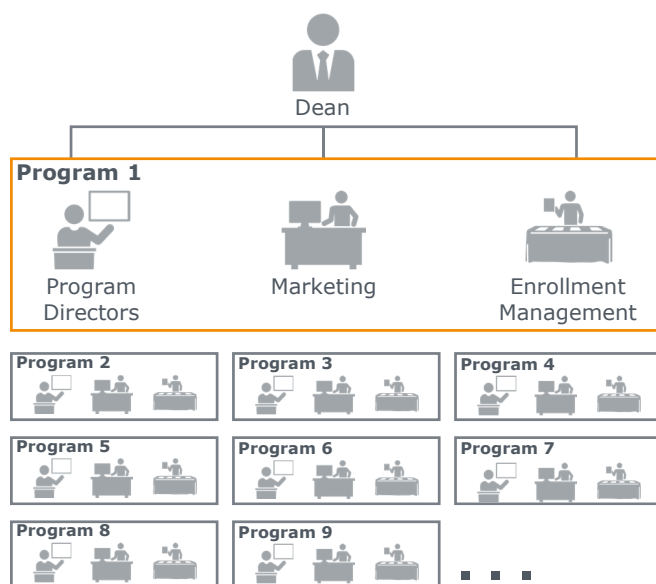
- Practice 10: Portfolio Performance Dashboard
- Practice 11: Pipeline Performance Consultations

From Program to Portfolio Management

Managing a Full Stable of Existing Programs After Launch

While it is critical for the marketing team to integrate with academic partners prior to program launch, COE leaders can neither focus solely on launching new programs nor myopically micromanage individual program performance. Instead, outside of program launch, COE leaders must elevate their focus to the portfolio level, where they make strategic decisions about how and where to allocate marketing resources across all programs. COE leaders need to understand which programs in the portfolio are poised for growth, and be able to diagnose why certain programs fail to meet enrollment expectations, in order to prioritize their marketing investments.

Program-Level Focus Important...



...But Portfolio Management Critical

How do I prioritize and distribute my investments equitably across the portfolio?

Which of my programs are most poised for growth?

From which programs should I consider reallocating my resources?

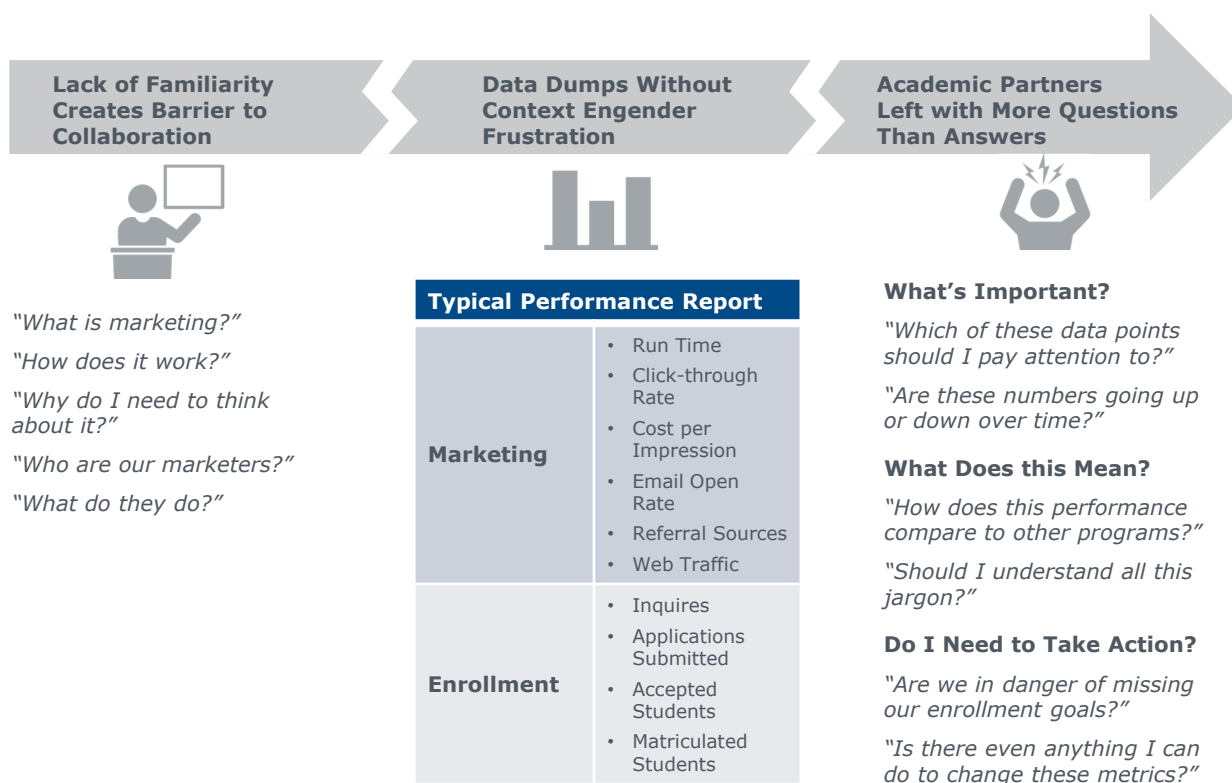
How do new program launches compliment existing portfolio offerings?

This study's second section, Calibrating the Portfolio, addresses the intricacies of program and portfolio management across all existing programs post-launch in three ways. First, profiled practices illustrate how COE units can elevate faculty understanding of program performance through hands-on collaborative consultations with marketing, recruiting, and enrollment management partners. Second, five practices demonstrate marketing's pivotal role in gathering real-time market insight from myriad stakeholders within and outside the institution. Third, a next-generation practice models how to efficiently and transparently allocate marketing resources across all existing programs based on future opportunities for growth, rather than past performance.

A Tower of Babel

Partnering with Faculty Post-Launch Presents Unique Challenges

One unfortunate challenge associated with the increasing sophistication of the marketing discipline is the commensurate complexity of marketing- and enrollment management-related jargon. Technological advances in particular have led to a seemingly infinite number of metrics that COE units are able to track and report to leadership or academic partners. It becomes incumbent on marketers and enrollment managers to ensure that these stakeholders understand the information presented to them, and are able to take necessary action to improve program performance.



Providing data without context or instruction can cause frustration for both COE units and their academic partners. Faculty members who receive complex progress reports are often not familiar with the detailed metrics and data points presented and thus do not know what action to take after receiving such reports. In turn, marketers struggle to solicit the support they require to diagnose and overcome barriers to enrollment in underperforming programs. The following three practices introduce disciplines to assess program performance relative to the full portfolio, elevate faculty member understanding of key marketing metrics, and enlist cross-functional teams to diagnose and alleviate barriers to enrollment.

Surfacing Slow Growth, High-Potential Programs

Transparent Program Comparisons Reveal Hidden Opportunities

The first step to maximizing COE unit performance and growth is to understand how programs across the portfolio perform against institutional benchmarks. Enrollment managers in Northeastern University's College of Professional Studies developed an easy-to-use dashboard that ranks programs in the portfolio across an agreed-upon list of marketing, recruiting, and retention metrics. Sorting across these key variables, the Dean can quickly determine not only high- and low-performing programs, but steady state or slow growth programs with opportunities for increased enrollment given adequate additional investment.

| Program | Avg. Apps/Year | App Growth | Conversion Rate | Avg. Inquiries /Year | Yield Rate | Retention Rate | Active Students | Avg. Annual Revenue/ Student | Annual Gross Revenue |
|-----------|----------------|------------|-----------------|----------------------|------------|----------------|-----------------|------------------------------|----------------------|
| Program 1 | 254 | 57% | 34% | 738 | 81% | 90% | 451 | \$ 7,549 | \$ 3,405,026 |
| Program 2 | 215 | 54% | 49% | 440 | 71% | 88% | 424 | \$ 7,418 | \$ 3,145,395 |
| Program 3 | 120 | 90% | 27% | 464 | 77% | 90% | 271 | \$ 9,419 | \$ 2,552,591 |
| Program 4 | 87 | 10% | 29% | 302 | 77% | 84% | 135 | \$ 7,570 | \$ 1,021,956 |
| Program 5 | 44 | 63% | 17% | 264 | 72% | 83% | 70 | \$ 7,044 | \$ 493,136 |
| Program 6 | 27 | -7% | 17% | 165 | 69% | 85% | 30 | \$ 8,876 | \$ 266,298 |
| Program 7 | 24 | -26% | 25% | 94 | 68% | 79% | 29 | \$ 7,448 | \$ 216,016 |
| Program 8 | 20 | 0% | 14% | 145 | 78% | 75% | 28 | \$ 5,450 | \$ 152,624 |



Northeastern University
College of Professional Studies



Nuanced assessment of portfolio strengths and weaknesses



Diplomatic communication of performance



Spurs conversations on opportunities to grow or sunset programs

Assessment Tool Characteristics

- Compares programs across the portfolio
- Solidifies internal benchmarks to guide future performance assessments
- Provides measure of individual program performance from an enrollment management lens

Dashboard in Brief

- 12 marketing and enrollment management metrics tracked
- Updated every term
- Overseen by enrollment management and unit leadership

This conditionally-formatted dashboard, available only to unit leadership, accomplishes a number of goals at once. It surfaces programs that are both under- and over-performing against current and historical institutional benchmarks. Additionally, the dashboard helps to set internal benchmarks that guide future program performance assessments, and illuminates slow-growth programs for further consideration. Unit leadership, in partnership with enrollment management, reexamine the dashboard's metrics every term and adjust them accordingly to reflect the unit's priorities.




Please see the "Program Performance Dashboard and Insight Sheet" tool on page 125 for further guidance.

Leading from Behind

Actionable Insights to Co-diagnose Enrollment Challenges




While portfolio-level dashboards help COE leaders visualize portfolio health, marketers also need to communicate program performance to their academic partners, and typically do so with progress reports or dashboards that highlight marketing metrics. However, faculty members may not understand the data included, and do not necessarily understand what they should do with it. To minimize conflict and ensure faculty members take appropriate action, marketers should guide their academic partners to solve enrollment barriers, rather than prescribe solutions. At Ball State University Online and Distance Education, the Director of Marketing uses annual program performance consultations between marketing and faculty to collaboratively diagnose and solve program-specific enrollment barriers.

Marketing Positioned to Help Improve Flagging Program Performance

-  Faculty director notices declining enrollments in Master of Education program but is unsure how best to improve results
-  Marketing director approaches for diagnostic consultation, and to educate faculty director on marketing metrics
-  Marketing director walks faculty director through program recruitment funnel performance

 **BALL STATE UNIVERSITY** *Program Pipeline Matrix*

| Year | Inquiries | % of Leads to Apps | % Apps to Complete (Internal Benchmark: 70%-80%) | % Complete to Matriculated (Internal Benchmark: 65%) |
|------|-----------|--------------------|---|---|
|------|-----------|--------------------|---|---|

-  **Internal Benchmarks** help academic clients calibrate performance against other programs
-  **Conversion Rates** provide faculty with insight into opportunities to improve performance across the funnel
-  **Historical Context** illustrates changes in performance over time

Annual Program Review Meeting Facilitates Ongoing Collaborative Problem-Solving



Communicates Context

Clearly illustrates trends and areas of improvement across the funnel



Limits Focus

Limits data shared to areas where faculty can make an impact



Educates Faculty

Offers concrete examples and illustrations of key marketing and enrollment management principles

During these annual consultations, faculty members teaching courses through Online and Distance Education receive a simplified program performance dashboard, limited to only program-related metrics that they can impact, compared against institutional benchmarks. The director of marketing can then recommend next steps to address below-benchmark performance in any given metric, such as low inquiry volume, lead-to-application conversion rate, or percentage of prospective students completing an application who ultimately matriculate.

Remedy Pipeline Woes

Guidance and Resources to Streamline Lead Handoffs and Improve Yield

To simplify the process by which faculty members can improve their lead nurturing efficacy, enrollment managers and marketers working in Online and Distance Education compiled a menu of solutions to the unit’s most common recruiting issues, organized along major marketing and recruitment functions over which faculty members have purview. The menu is available as a physical or digital document, which marketing and enrollment management staff can discuss with academic partners.

Pipeline Review Diagnoses Lead Nurturing Failure

- Upon review, program director co-diagnoses high application-to-enrollment attrition as leading cause of declining program enrollments
- Director examines lead nurturing playbook provided by marketing and recruitment team

| Issue | Solution | Method |
|---|--|---|
| High inquiries without corresponding applications | Reach out proactively and consistently to all inquiring prospective students to answer questions and ensure application | <ul style="list-style-type: none">• Phone follow-up 24 hours after inquiry• Subsequent email or phone follow-up once per week for 4 weeks or until application is identified |
| High applications without corresponding enrollments | Congratulatory correspondence to prospects confirming submitted application and offering support for remaining questions or next steps | <ul style="list-style-type: none">• Automatic email response immediately following application submission• Phone follow-up within 48 hours |



Faculty director implements mandatory phone follow-up with all started applications

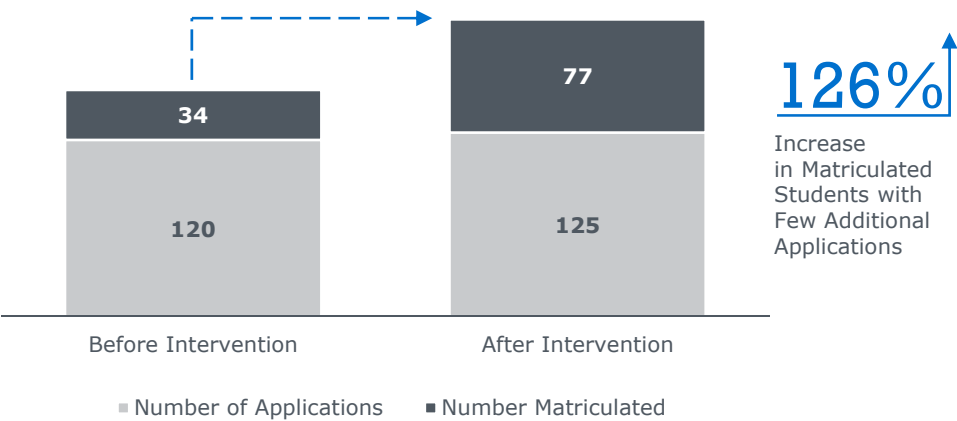
Academic departments are often responsible for shepherding inquiring students through to application and enrollment, but are typically unfamiliar with established lead nurturing strategies and suffer constraints on their scarce time and resources. To ease the pressure placed on the academic unit, Online and Distance Education’s marketing director met with the director of a master’s in education program, and the two identified low application-to-enrollment conversion rates as the primary source of enrollment decline in the program. Upon reviewing the playbook, the program director decided to implement mandatory post-application phone and email follow-up among all program faculty.

Empowered Faculty Improve Program Outcomes

Data Sharing Reveals Gap in Prospect Follow-Up

After the director of the Master’s of Education program implemented mandatory post-application phone and email follow-up among all faculty to improve conversion from application to enrollment, the program realized impressive growth in matriculations. Since the number of applications remained relatively constant, the program director and director of marketing attributed the triple-digit growth in enrollments to the lead nurturing intervention. Further, the director of marketing had decreased her investment in the program following its historically poor performance, making its growth all the more impressive.

Win-Win for Marketing and Program Director

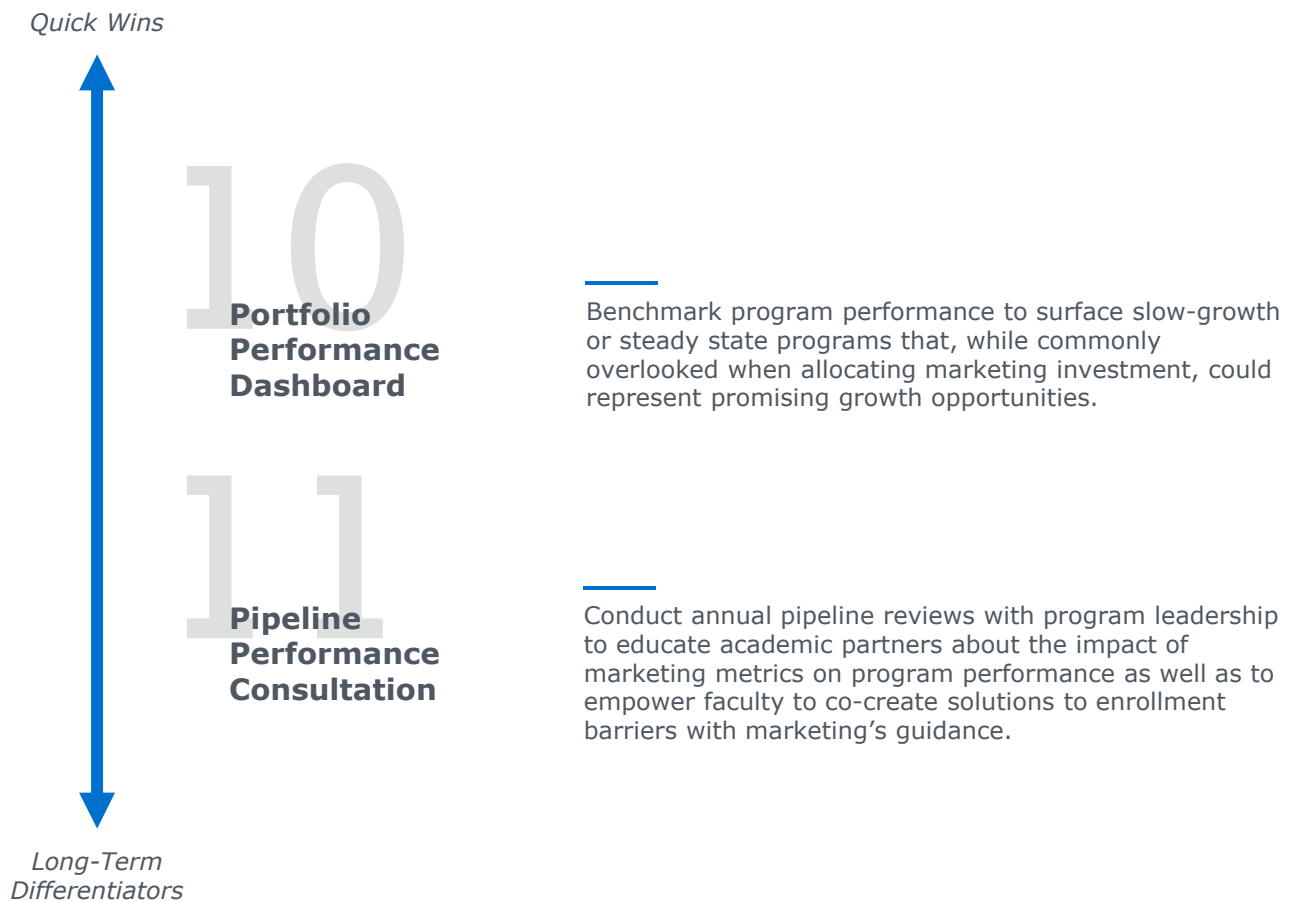


“We even spent less on marketing post-intervention given the program’s poor performance. That means we more than doubled its conversion rate with less financial investment.”

Director of Marketing

Integrating Marketing in Program Development

Key Lessons for Implementation





Gathering Real-Time Market Insight

SECTION 5

- Practice 12: 360-Degree Program Assessment Questionnaire
- Practice 13: Frontline Staff Focus Groups
- Practice 14: Actionable Employer Advisory Boards
- Practice 15: Student Feedback Solicitation Form
- Practice 16: Action-Driven Insight Sheets

A Missed Opportunity

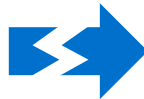
Failure to Engage Unique Perspectives Leaves Insights Off the Table

Frontline staff, employer advisory boards, and current and graduating students all offer unique perspectives on a program's strengths and opportunities for improvement, but COE leaders and marketing staff often struggle to effectively engage these stakeholders in the program review process. Failure to engage these groups results in missed opportunities to collect valuable information related to program performance.

Numerous Opportunities for Improved Information



Frontline staff wield customer insights to generate new market-driven program ideas

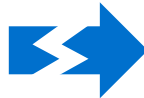


Common Barriers to Effective Information Gathering

- Conversations with prospective students siloed in CRMs or frontline staff notes
- Frontline staff not considered strategic partner



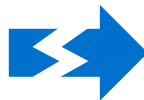
Faculty provide insight into customer needs, unique program strengths, and help to pressure test marketing plan



- Faculty fail to understand how they can contribute to marketing
- Marketing fails to approach faculty in constructive, timely manner



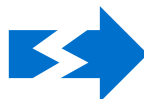
Employers help reposition struggling programs out-of-sync with industry needs



- Busy professionals difficult to access
- Vanity advisory boards merely attract resume builders



Current and graduating students propose just-in-time program changes to strengthen the portfolio



- Busy student schedules preclude standardized information gathering
- Current and graduating students overlooked as vital resources

Conversations between frontline staff and prospective students often remain siloed in CRM software or call notes, rarely collected and analyzed in a systematic way to determine why prospective students who do not ultimately apply and enroll decide not to do so. Employers participating on workforce advisory boards are often difficult to contact, are interested only in the resume-building opportunity the advisory board offers, or remain forgotten amidst frantic day-to-day program maintenance tasks. Finally, current and graduating students are busy completing degree requirements and are overlooked as sources of inspiration to revitalize or refresh existing programs. The following examples highlight tactical methods to engage each of these stakeholders as strategic program partners.

Seeking Guidance from the Full Program Team

Expanded Approach Garners Robust, Holistic Insights

Though faculty members possess a wealth of knowledge related to program content and student profile, they are not the only stakeholders that COE leaders should consult to understand a program's performance and diagnose barriers to enrollment. Marketers, enrollment managers, and recruiters likewise possess key insight related to a program's market size, competitive positioning, and prospective student demand. To understand program performance, leaders of Northeastern University's College of Professional Studies solicit insight from all of these groups using a role-specific questionnaire.



Northeastern University
College of Professional Studies

Simple Data Reviews Miss Key Opportunities to:

- ✓ Mine frontline and marketing staff to generate insights unavailable to faculty
- ✓ Garner faculty buy-in prior to making recommendations for programmatic changes
- ✓ Surface shifts in post-launch student demographics and market demand

Inclusive, Cross-Functional Teams Fill in the Gaps



Marketing and Market Research



Faculty



Frontline Staff

1

- What is this program's market size?
- Who are our prospective students?
- Where do they consume information?
- What messages most appeal to them?
- What motivates students to enroll in this program?
- What courses do students find most valuable?

2

- What are our students' career goals and how do they align to this program?
- What are the key companies and professional organizations aligned with this program?

3

- What barriers prevent prospects from enrolling?
- What in-demand programs do we not offer?
- Where else are students applying and enrolling?

Faculty members can help the marketing team to understand a program's strengths, competitive advantages, value propositions, and also provide a robust perspective on the ideal student's goals and motivations for enrollment. Marketing staff keep their focus on the customer, building detailed prospective student profiles and sizing the recruitment pool to craft impactful messages and optimize campaigns. Frontline staff, perhaps the most overlooked source of program and market insight, provide invaluable observations about program strengths, weaknesses, and barriers to enrollment directly from the voice of prospective students. Further, in conversations with prospective students who ultimately decide to seek other academic offerings, frontline staff can serve a vital program development function by surfacing in-demand programs not yet offered by the institution.

Please see the "360-Degree Program Assessment Template" on page 104 for further guidance.

Gleaning Insights from Inquiries

Reoccurring Focus Groups Offer Holistic Insights and Solutions

Interactions between frontline staff and prospective students, especially students who ultimately decide not to enroll at the institution, represent an undervalued source of market intelligence. However, these interactions often occur in a silo, and marketing staff and COE leaders are unable to systemically capture these insights to understand common barriers to enrollment and in-demand programs the institution does not yet offer. To break down these siloes and engage frontline staff, the director of marketing for continuing education at The New School has developed cross-functional frontline focus groups to systematically mine this intelligence and develop actionable advice to guide marketing campaigns and unit strategy.

Cross-Functional Focus Group...



- Participants nominated by departments
- Meets quarterly for interactive sessions
- Moderated by Director of Marketing for Continuing Education

...Answers Up-At-Night COE Questions

- 1 *What are the background and motivations of our current and existing students?*
- 2 *What marketing channels are driving the most interest from our prospects?*
- 3 *What topics are students interested in that existing programs don't cover?*

**THE
NEW
SCHOOL**

Quarterly interactive sessions convene nominated representatives from prospective and current student-facing functional groups, including program-specific recruiters, academic planning and advising, marketing and admissions, and the registrar's office to brainstorm new and innovative marketing and program development strategies for nontraditional students. Together, these groups provide unparalleled insight into the needs and concerns of both current and future students.

Please see the "Inquiry Mining Worksheet" on page 111 for further guidance.

Interactive Sessions Mine Intelligence

In these cross-functional meetings, frontline staff representatives engage in a range of marketing and program development activities. Meeting agenda items include brainstorming sessions to develop detailed student personas based on interactions with current and prospective students, in-depth audits of current marketing channel strategy, and even intensive sessions to develop and present new program ideas. Illustrated in item three, below, The New School calls these sessions “create a new class hackathons,” to denote the recently popularized new company or product development events in the tech community.

| Open Questions | Activity | Output |
|--|--|--|
| 1 What are the background and motivations of our current and existing students? | Facilitated brainstorming to identify prospective student motivations based on inquiries | <ul style="list-style-type: none">• Develop common student personas and qualities• Strategies for diagnosing interests and pitching programs to prospects |
| 2 What marketing channels are driving the most interest from our prospects? | Review of current strategies and channels | <ul style="list-style-type: none">• Identified most promising channels• Developed strategies to improve existing usage |
| 3 What topics are students interested in that existing programs don't cover? | “Create a new class hackathon” to surface new program opportunities based on student inquiries | <ul style="list-style-type: none">• Submitted proposals for new programs that address unmet demand• Designed handbook to better cross-sell and redirect prospects |

Other benefits to these sessions include cross-training frontline recruiting staff who work within single departments or colleges on the programs offered by other departments, helping frontline recruiters to better understand every program available throughout the New School. With improved knowledge of the full program portfolio, recruiters can more effectively triage prospective students who inquire at one department about a program in another department to their programs of interest.

Please see the ‘Create a New Class Hackathon’ Agenda on page 113 for further guidance.

Employer Advisory Boards Reinvigorate Programs

Industry Advisory Board Offers Sounding Board Beyond New Program Launch

Most institutions consult with employer advisory boards to ensure new programs align with industry needs. While COE units most commonly enlist these boards to support new program launches, employer advisory board insight can also help to diagnose barriers to enrollment in existing programs. At Benedictine University's National Moser Center for Adult Learning, employer advisory boards serve as dynamic on-demand sources of market insight that help guide the curriculum, delivery, format, and structure of existing, struggling programs.



Enlisting advisory boards to review existing programs allows the Moser Center's program directors to lead targeted, well-defined meetings, rather than often-nebulous discussions about potential programs for development. Directors can surface specific issues their programs face and solicit tangible recommendations from the board. Program directors use their boards to gather feedback on program details such as curriculum, pricing, and modality, as well as marketing strategies related to prospective student personas, messaging, and channels. These advisory boards, comprised of professionals from across the Moser Center's expansive geographic service region, participate in one face-to-face meeting, one virtual meeting, and two follow-up surveys that capture general insights about the field as well as information specific to certain geographic regions and labor markets.

Advisory Board in Action

Industry Recommendations Reverse Declining Enrollments

In the case of a Bachelor's Degree in Criminal Justice, the advisory board was able to quickly diagnose multiple barriers to enrollment, recommend discrete changes to the program's delivery format and schedule, and ultimately facilitate a 75% increase in that program's applications just six weeks after program leadership had implemented the board's recommendations.

Declining Enrollments Raise Questions on Viability of Criminal Justice Program



Despite evidence of market demand, Bachelor's in Criminal Justice suffers stagnant enrollments year over year



Inquiry volume exceeded internal benchmarks, but few leads converted to applicants



Developed initial set of hypotheses and strawman models to refresh program



Convened advisory board to gain feedback prior to implementation

Advisory Board Pinpoints Solution to Solve Enrollment Challenges

- Curriculum review garnered positive feedback
- Isolated challenges with scheduling as primary barrier due to shift work
- Nonrefundable fee offered additional barrier to enrollment
- Redesigned program format to include quarterly class scheduling responsive to participants' shifts and removed fee requirement

75%

increase in applications
six weeks after schedule
refresh

Despite evidence of promising market demand for the Bachelor's in Criminal Justice program offered through the Moser Center's distributed satellite campuses, the program suffered stagnant enrollments and below-benchmark conversion from inquiry to application. The program's faculty brainstormed potential barriers to application and enrollment, proposing changes to the program's curriculum, and shared these hypotheses at the advisory board's next meeting. Interestingly, the advisory board affirmed the program's current curriculum, instead attributing the stagnant enrollments to the program's inflexible delivery schedule that failed to account for the shift work of its students, many of whom work full time as police officers for local departments. Program leadership decided to customize program schedules for each police department in the local area based on the needs of the officers, which requires a quarterly update to the schedule.

Application to Graduate Serves Double Duty

Another commonly overlooked source of program-related insights are current students and recent graduates. Many institutions administer course assessments and require applications to graduate, but rarely use the information gathered through these tools to inform and adjust program design, content, and marketing strategy. COE program graduates, many of whom hold full-time positions or plan to enter the workforce immediately, possess unique insight into the specific demands employers have for professionals in their chosen field. At Brandeis University Graduate Professional Studies, a mandatory application to graduate doubles as a source of marketing and program insight.

Nudging Students When Most Receptive



Convenient

Student already on website



Captive Audience

No additional requests post-graduation



Reveals Opportunities for Program Development

Bioinformatics program added Java course requirement following student reports

...Yields Actionable Input

- *How likely are you to recommend this program to a friend?*
- *What were your goals when enrolling in the program?*
- *How often do you use the following:*

| | > Once/ Day | Once/ Day | Weekly | Monthly |
|-----------|--------------------------|--------------------------|--------------------------|--------------------------|
| Facebook | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| LinkedIn | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Twitter | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Pandora | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Instagram | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Snapchat | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

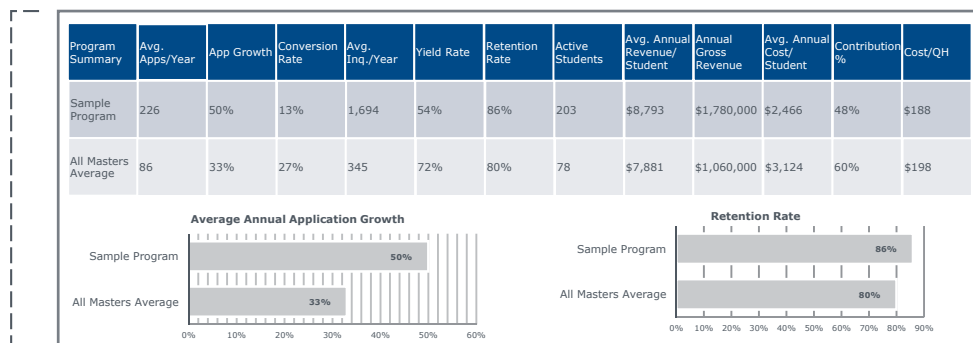
The mandatory application to graduate allows marketing leaders to assess the current media consumption habits among graduates, their motivations for enrollment, and even determine the likelihood that students would recommend the program to a friend. In fact, the document in its current form has already demonstrated its use in helping GPS programs remain aligned with market needs. Graduates of the bioinformatics program, many of whom had interviewed with multiple companies prior to graduating from the program, consistently reported employer demand for Java programming skills. Faculty members have since revised the curriculum to transition Java from an elective to a required course.

Pairing Data and Insight

Synthesis of Quantitative and Qualitative Recommendations

While gathering insights from multiple sources and program stakeholders helps diagnose why a program may not be meeting enrollment expectations, translating these insights into concrete recommendations remains a challenge. At Northeastern University's College of Professional Studies, enrollment management leaders deliver quantitative program performance data, portfolio-wide benchmarks, and qualitative insights from marketing and frontline staff to program leadership in easy-to-consume, one-page insight sheets.

While it remains important to place data, in context, in front of decision makers, **you still need to...**



- ✓ Offer strategies that move beyond “filling the top of the funnel”
- ✓ Pinpoint causal factors impacting program performance
- ✓ Incorporate feedback from all student-facing stakeholders

Insights and Recommendations



Northeastern University
College of Professional Studies

Faculty To Do:

- Low yield rate and inquiry-to-conversion rate indicates opportunity to improve follow-up with leads.
- Consider changes to program format and pricing to differentiate from local competitors.

Marketing/Market Research/Enrollment Management Staff To Do:

- Audit current lead nurturing strategies to identify gaps and draft templates.
- Survey students who were accepted, but didn't attend, to uncover motivations.
- Implement an admitted applicant survey to gather qualitative data regarding yield rates.

Frontline Staff To Do:

- Increase emphasis in messaging to working professionals on low-residency program options and GRE-optional application.

These insight sheets summarize information gathered from marketing, faculty, enrollment management, and frontline staff, and then offer concrete recommendations for each of those groups to contribute to improving program performance. COE leaders can use earlier practices to gather additional information from employers, students, and frontline staff before summarizing and prioritizing recommendations and next steps with the insight sheet format illustrated above.

Please see the “Program Performance Dashboard and Insight Sheet” tool on page 125 for further guidance.

Bridging the Administrative and Academic Gap

Three Benefits to Enhanced Programmatic Assessments

Many programs require only small adjustments to curriculum, schedule, or marketing messaging, but some steady state programs can over time become fundamentally misaligned with market demand. After extensive program review using the practices profiled in this study, CPS leaders identified one program with numerous opportunities for improvement.



Empowers More Sophisticated Consumers of Enrollment Data



Surfaces Programs for Strategic Refresh



Identifies Programs for Investment and Divestment

“Our aim has been to create a culture of data informed decision making by encouraging individuals from all areas of the college to review, understand, and discuss key enrollment metrics.”

Director of Enrollment Research and Strategy
Northeastern University

Refresh Unleashes Program Potential

Market research and interviews with academic partners identify opportunities to improve program content and positioning.

- Name changed
- Transitioned fully online
- Curriculum adjustments created new concentrations
- New faculty hire became champion of program refresh

209%

increase in program enrollments three years after refresh

The program anonymized above provides an example of how Northeastern’s action-driven insight sheets can facilitate enrollment growth. Once a flagship program in the portfolio, it had become outdated in name, content, and delivery, and lacked internal champions to shepherd any major refresh initiatives. Following review and the decision to invest in a new faculty line for the program, CPS and program leadership decided to change the program’s name, update and adjust its curriculum to create new concentrations better aligned with employer demand, and transitioned the program to a fully online format. Just three years after the refresh, the program achieved impressive enrollment growth. No one group, be it faculty, marketing, enrollment management, or frontline staff, fully understands every component of program health, and only through combining these perspectives and insights can COE units realize maximum performance.

Integrating Marketing in Program Development

Key Lessons for Implementation

Quick Wins



15

Student Feedback Solicitation Form

Mine intelligence from a captive audience (e.g., testimonials, programmatic feedback, preferences on modality, likelihood to use different marketing channels) at highest impact moment.

12

360-Degree Program Assessment Questionnaire

Capture feedback from faculty, frontline staff, and marketing by deploying a role-based questionnaire to diagnose root case problems for programs with declining or stagnating enrollments.

16

Action-Driven Insight Sheets

Supplement program performance data with actionable recommendations to improve enrollments based on feedback from multiple sources.

13

Frontline Staff Focus Groups

Formalize practices and forums for frontline staff to communicate insights on the demand and preferences of current and prospective students to decision makers.

14

Actionable Employer Advisory Boards

Form program-specific advisory boards to gather “real-time” intelligence from industry contacts before and after launch, gaining insight on variables that can’t be captured via market research.

Long-Term Differentiators



Surfacing Programs for Strategic Investment

SECTION 6

- Practice 17: Bias-Free Program Prioritization Matrix

Guts, Guesswork, and Ghost Benchmarks

Two Frustratingly Common Components of Marketing Budget Setting

Not every program requires the same amount of marketing investment, and marketers and COE leaders require a methodology to identify the programs for which additional marketing investment will produce the greatest positive impact on enrollment. Unfortunately, many COE units allocate marketing dollars either too rigidly or too loosely, investing equal amounts in every program regardless of whether that money will positively impact enrollments, or allowing unconfirmed instinct or hypotheses to replace data-driven decision making. Marketers must allocate their resources according to a program's performance, rather than relying on rigid budget policies or unconfirmed intuition.

One-Size-Fits-All

Standardized percentage of revenue dictates marketing spend for all programs across the portfolio

“We consistently reinvest 20% of program revenue into marketing, but we have no idea where that number came from.”

Dean, Continuing Education
Large Public
Research Institution



Rigid approach wastes money on weak programs and ignores opportunities for growth that require increased investment.



Instinct and Intuition

Marketing hunches and anecdotal reports inaccurately classify program winners and losers and guide marketing investment

“We have a gut sense of which programs are doing well and poorly, but that doesn't necessarily lead to smart budget allocations.”

Marketing Director
Midsized Private
Research Institution

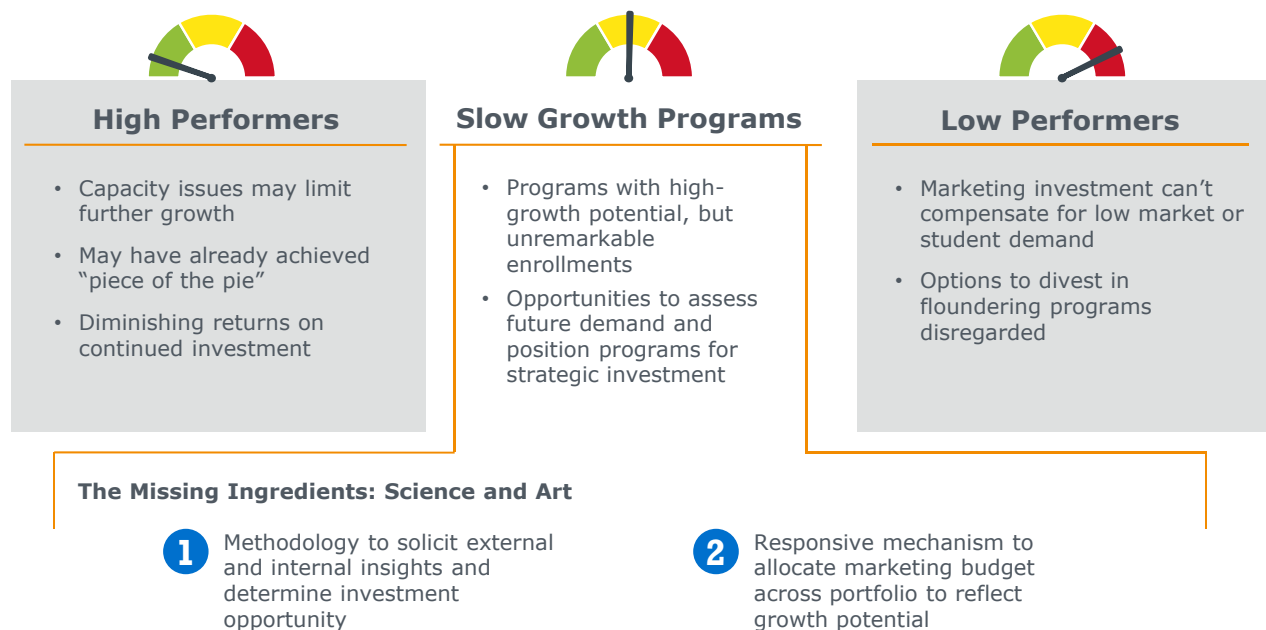


Despite expertise, marketing insights represent only one data source and offer an incomplete assessment of program opportunity

Often, marketing resource allocation decisions default to the above problematic modes for two reasons. First, challenging political relationships on campus can lead to forced equitable decision making that avoids privileging, or seeming to privilege, any one program over another. Second, Low-performing or steady-state programs generate less revenue than high performing programs, leading to vicious cycles of lower investment in marketing when COE leaders base such allocations on percentages of gross revenue generated.

Historical Performance Inadequate Investment Guide

Steady state or slow-growth programs often represent the most promising opportunities for growth with additional marketing investment, but unit priorities too often focus efforts on high- and low-performing programs. Investing in already successful programs overlooks the degree to which those programs may have maximized their growth potential, while investing in weaker programs might obscure more fundamental issues with those programs' market appeal.



To maximize the latent potential that many slow growth or steady state programs possess, Georgetown University's School of Continuing Studies leverages a powerful three-part process that combines externally-focused market research, internally-focused qualitative assessment, and the marketing team's insights and professional discretion to guide investment based not on historical or current program performance, but on opportunities for future growth. The Georgetown team uses the analyses illustrated on pages 80-83 to position each program in the portfolio on a three-by-three matrix, with industry attractiveness (i.e., the program's capacity to grow and succeed in the market) plotted on one axis and business unit strength (i.e., the program's internal capacity and brand strength) plotted on the other. Ultimately this process helps the team to determine the percentage of gross revenue that each program receives in marketing investment.

One Part Science, One Part Art

Externally Focused Market Research Determines Industry Attractiveness

| Variable | Why They Chose It | Data Source |
|---|---|---|
| J: # of Jobs in Given Year | Forecast program growth potential | <ul style="list-style-type: none"> Burning Glass Labor/Insight™ |
| G: % of Jobs Mentioning Master's | | |
| L: Jobs Location | Assess strength of local market and overall employment prospects. | |
| V: Volume/Market Size | Estimate current/potential program market size | <ul style="list-style-type: none"> Burning Glass Labor/Insight™ BLS |
| P: Pay | Assess earning potential in field | |
| MG: Market Growth | Forecast program growth potential | <ul style="list-style-type: none"> BLS |
| M: % of Master's in the Field | | |
| D: Master's Degree Output | Estimate current student demand | <ul style="list-style-type: none"> IPEDS |
| S: Demand | | <ul style="list-style-type: none"> Web Analytics |
| C: Reputation/Competition | Emphasize competitive advantages and identify opportunities for differentiation | <ul style="list-style-type: none"> Program and institutional rankings |

1 Broad range of variables capture holistic measure of market opportunity

2 Future-oriented perspective accounts for growth potential and avoids wasted investment on doomed programs



GEORGETOWN UNIVERSITY
School of Continuing Studies

Internally-Focused Qualitative Analysis Determines Business Unit Strength

| Variable | Why They Chose It | Data Source |
|------------------------------------|--|---|
| Brand Equity | Identify unique program strengths, value propositions, and opportunities for further development | <ul style="list-style-type: none"> Program leadership interviews Employer interviews Current and prospective student interviews Industry awards, rankings, social media activity Word-of-mouth feedback from admitted students |
| Program Maturity | Calibrates marketing spend based on market awareness of program | <ul style="list-style-type: none"> Historical knowledge Program leadership interviews |
| Capacity | Forecast program growth potential | |
| Fit with Location | Hones marketing messages based on local industry needs | <ul style="list-style-type: none"> Knowledge of alignment between strengths of institution and geographic location |
| Distribution Channel Access | Estimate financial barriers to effective program promotion | <ul style="list-style-type: none"> Program leadership interviews Marketing channel results evaluation |

1 Broad range of variables capture multifaceted picture of program strength

2 Multiple qualitative data sources and inputs ensure holistic assessment of program opportunity

3 Program leadership interviews bring academic partners to the discussion and mine unique insights

Source: EAB interviews and analysis

One Part Science, One Part Art (cont.)

Externally Focused Market Research Determines Industry Attractiveness

To measure industry attractiveness, the team analyzes 10 data points, covering market size, geographic parameters, market saturation, student demand, competition, and program reputation to produce a numerical score commensurate to the attractiveness of the industry a single program serves. This analysis uses data from multiple sources to diversify the input and capture the most comprehensive picture of the program's future viability in the market, and grounds the SCS team's marketing allocation decision in tangible, observable data elements, offering transparency to all stakeholders in the process.

This comprehensive quantitative approach offers three particular strengths. First, diversification of market measures ensures that marketers consider all components of external market conditions. Second, an emphasis on market size, student demand, and market growth prioritize opportunities for future improvements to program performance over current or historic measures. Finally, a weighted algorithm, modified as needed based on program and unit priorities, allows the marketing team to dynamically emphasize the effect of certain variables on investment decisions. This process scores the program's industry attractiveness as either "high," "medium," or "low," which help plot the program on the matrix on page 83 to determine the amount of marketing investment it receives. Georgetown's algorithm is included in this page's footnote, but members are encouraged to develop their own system based on the weight they wish to ascribe to each variable.

Internally-Focused Qualitative Analysis Determines Business Unit Strength

The second component of the SCS team's resource allocation mechanism evaluates business unit strength, or a program's position in the market and capacity for growth. Multi-stakeholder interviews, institutional knowledge, and the evaluation of current and past marketing efforts provide essential insight into whether a program is positioned to grow. The practices profiled in previous sections of this study can be used to collect the data required to populate the matrix.

This phase of the process relies heavily on the input of faculty members and program leadership. This ensures that faculty members have a direct impact on the level of marketing investment their program receives, and can observe firsthand the process by which that investment is determined and allocated. Securing early faculty buy-in allows the marketing team to justify their ultimate decision, and prevents animosity building up between the unit's teams. This process scores the program's business unit strength as either "high," "medium," or "low," which help plot the program on the matrix on page 83 to determine the amount of marketing investment it receives.

Case in Brief

- Georgetown SCS market research analysts take approximately eight hours to complete analyses for a single program, but achieve greater speed and efficiency over time.
- One data analyst develops an algorithm that assigns weights to different variables given their historical ability to predict the ROI on marketing investment.



Five Additional Areas of Calibration

The third phase of analysis involves calibration to the output generated by the previous phases based on experience and professional discretion. No algorithmic or otherwise data-driven approach can substitute for or eliminate the need for human input, especially in COE units where market complexities belie attempts to provide neat, contained analyses. Five elements, illustrated below, augment the ultimate level of marketing investment that each program receives.



Cost to Access Target Audience

Saturated markets necessitate higher marketing spend



Efficacy of Traditional Strategies

Word of mouth success merits divestment from more expensive channels



Maturity of Credential

Newer programs require greater investment to build awareness



Recent Program Modifications

Major changes to modality, schedule, or content require investment to reeducate the market



Organizational Mission

Certain programs with low market demand may align with mission and require additional support

“We’ve continued to tweak our current model over and over again, since original designs didn’t incorporate the level of nuance that we knew we needed. Algorithms and number crunching are great, but marketers can and should still bring their knowledge and expertise to bear on this process.

Chief Strategy and Communications Officer
Georgetown University

Prioritizing Investments Across the Portfolio

Process Aligns to Annual Budget Cycle to Determine Marketing Allocation

The output of this multistep process is a program score, which informs where a program is placed on a matrix like the one illustrated below. Program scores on business unit strength and industry attractiveness determine the percentage of projected gross revenue that the team will reinvest in marketing for that program. Aligned to the unit’s annual budget cycle, this process ensures that marketing efforts reflect up-to-date intelligence on program performance.

■ Grow (5%)

■ Maintain (4%)

■ Manage (3%)

Percentage of projected gross revenue to be reinvested in marketing

| | | Business Unit Strengths | | |
|-------------------------|--------|-------------------------|---------------------|------------------|
| | | High | Medium | Low |
| Industry Attractiveness | High | Programs A, B | Programs C, D, E | Programs F, G, H |
| | Medium | | Programs I, J, K, L | Programs M, N, O |
| | Low | Program P | Programs Q, R, S | Program T |

Program T Case Study

- Process revealed three-year-old program with little growth potential

50% decrease in marketing investment¹

- Funding reallocated to high-growth potential programs

One important note for implementation regards the matrix’s color coding. Programs that fall into orange categories—scoring low on measures of industry attractiveness and business unit strength—do not necessarily represent weak or failed academic efforts. These programs may simply require less marketing investment due to high levels of organic student interest or inadequate course capacity to support future growth. One such program, highlighted in the box above, had grown rapidly over its three-year lifespan and reached market saturation. While still considered successful, this program did not represent an attractive return on marketing investment because additional dollars could not generate commensurate increases in leads, applications, and enrollments. The marketing team scaled back investment in the program and was able to reallocate those dollars to other programs in need.

1) Decrease from initial start-up investment level of spend

Source: EAB interviews and analysis



Marketing Across the Program Lifecycle Implementation Tools

Toolkit for Integrating the Marketing Team and Calibrating Investment Across the Program Lifecycle

APPENDIX

The COE Forum has largely adapted the following tools from select best practices profiled in the Marketing Across the Program Lifecycle study. Each tool provides tactical guidance to COE unit and marketing leaders hoping to more effectively integrate the marketing function through program development and launch, and calibrate marketing investment across the program portfolio. Tools range in function and purpose from faculty insight questionnaire builders, 360-degree program assessment templates, program performance dashboards, enrollment marketing templates, and educational primers on social media marketing channels. Together, the following tools will help COE units position their marketing teams for success across the program lifecycle.

Tool 1: Marketing Services Request Form Builder

Tool Overview

COE units that employ their own marketing team, especially in shared services divisions that work directly with academic units across the institution, often struggle to articulate and describe the numerous resources available to their academic partners. Engagements between the marketing team and program leadership often occur on an informal or ad hoc basis, with faculty members unsure who in the division to approach for marketing support, and marketers unsure who among their academic partners requires assistance. Further, when these interactions happen at all, they often do not provide the marketing team with enough time to develop a viable marketing campaign.

Taking their cue from centralized marketing and IT functions, some COE marketing teams have implemented web-based service request forms that triage requests from academic partners and other groups on campus. These forms ensure that partners include relevant information in their requests, and provide enough time for the marketing team to execute these requests.

Use this intake form template to formalize the process by which non-marketing stakeholders, especially academic units and partners, request marketing assistance. This form process should centralize and facilitate the request submission process in part by translating service offerings into the voice and language of the academic partner, rather than the voice of the marketing team. By making this form available online, coding included fields as required, and including service descriptions and time requirements (e.g., form must be submitted X months prior to program start date) COE marketers can ensure they receive the information they require from their academic partners to develop and execute effective marketing campaigns.

Operational Notes

This form should be submitted in its entirety (including subsequent pages) to secure the marketing team's service(s). The marketing team can determine how to allocate its resources based on the demand it receives from academic partners and other on-campus stakeholders. Administering services on a first-come-first-served basis offers the most bias-free option, and units should consider this methodology when first starting out. A project manager from the marketing team must be assigned to each project.

Project Requestor Contact Information:

| | |
|--|--|
| Name: | |
| Title: | |
| Department/ Division/ School: | |
| Email: | |
| Phone: | |

Project Information

| | | | |
|--|---|--|--|
| Reason for Inquiry: | <input type="radio"/> I am not sure exactly what I need, and would like to schedule a general consultation <input type="radio"/> I need to ensure that the program I am about to launch will be successful | <input type="radio"/> I need help increasing enrollments in an existing program <input type="radio"/> I need to validate an idea I have for a new program | <input type="radio"/> I need to transition my existing face-to-face program to an online format <input type="radio"/> I am a faculty member (or oversee faculty) who need(s) training to teach effectively in an online environment |
| Deadline: | | | |
| Budget: | | | |
| Additional Notes or Description of Request: | | | |

Subsequent Pages, Based on Indicated Need

I am not exactly sure what I need, and would like to schedule a general consultation

| | | | | | |
|--|---|--|--|---|---|
| Please give us some context. Why are you submitting this request right now? | | | | | |
| If you had to choose one topic area to focus on, which would you choose? | <input type="radio"/> I really cannot describe my request in any greater detail at this time <input type="radio"/> I need to ensure that the program I am about to launch will be successful | <input type="radio"/> I need help increasing enrollments in an existing program <input type="radio"/> I need to validate an idea I have for a new program | <input type="radio"/> I need to transition my existing face-to-face program to an online format <input type="radio"/> I am a faculty member (or oversee faculty) who need(s) training to teach effectively in an online environment | | |
| Please indicate preferred availability: | Monday <input type="radio"/> Morning <input type="radio"/> Afternoon | Tuesday <input type="radio"/> Morning <input type="radio"/> Afternoon | Wednesday <input type="radio"/> Morning <input type="radio"/> Afternoon | Thursday <input type="radio"/> Morning <input type="radio"/> Afternoon | Friday <input type="radio"/> Morning <input type="radio"/> Afternoon |
| A member of our team will contact you shortly! | | | | | |

I need to ensure that the program I am about to launch will be successful

| | | | | | |
|--|---|--|--|---|---|
| Program Name: | | | | | |
| Program Level: | | | | | |
| Discipline: | | | | | |
| Anticipated Program Launch Date: | | | | | |
| Please indicate preferred availability: | Monday <input type="radio"/> Morning <input type="radio"/> Afternoon | Tuesday <input type="radio"/> Morning <input type="radio"/> Afternoon | Wednesday <input type="radio"/> Morning <input type="radio"/> Afternoon | Thursday <input type="radio"/> Morning <input type="radio"/> Afternoon | Friday <input type="radio"/> Morning <input type="radio"/> Afternoon |
| Please complete the attached Prelaunch Faculty Program Questionnaire (Tool 3 in this toolkit) | | | | | |
| A member of our team will contact you shortly! | | | | | |

I need help increasing enrollments in an existing program

| | |
|--|--|
| Program Name: | |
| Program Level: | |
| Discipline: | |
| Please describe the program's topical focus area(s): | |
| Please enumerate any faculty awards, program rankings, or other accolades: | |
| What about the program do students find most valuable? | |
| What about the program do students find least valuable? | |
| Please describe the type of student this program currently enrolls (be as specific as possible): | |
| Please describe the type of student you hope to enroll more of in this program: | |
| Why have you not enrolled the above type of student before? | |
| What institutions represent this program's primary competition? | |
| What are the primary reasons a prospective student would choose a competitor program over this program? | |
| What aspects of this program are uniquely valuable compared to other similar available programs? | |
| What motivates prospective students to enroll in this program? | |

| | | | | | |
|--|---------------------------------|---------------------------------|----------------------------------|---|--|
| What barriers most commonly prevent students from applying to and enrolling in this program? | | | | | |
| Please describe the media consumption habits of your prospective students: | | | | | |
| How do students hear about this program? | | | | | |
| To which companies, professional organizations, or other groups, if any, does this program and its students align? | | | | | |
| Please enumerate any special program features (e.g., experiential learning, unique facilities): | Marketing Activity | Dollars Allocated | Leads Generated in Last 3 Months | Applications Generated in Last 3 Months | Enrollments Generated in Last 3 Months |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Please indicate preferred availability: | Monday | Tuesday | Wednesday | Thursday | Friday |
| | <input type="radio"/> Morning | <input type="radio"/> Morning | <input type="radio"/> Morning | <input type="radio"/> Morning | <input type="radio"/> Morning |
| | <input type="radio"/> Afternoon | <input type="radio"/> Afternoon | <input type="radio"/> Afternoon | <input type="radio"/> Afternoon | <input type="radio"/> Afternoon |
| A member of our team will contact you shortly! | | | | | |

I need to validate an idea I have for a new program**Proposed Program Name:****Program Level:****Discipline:****Please describe why you think it is a good idea to launch this program:****Please complete the attached New Program Launch Questionnaire****A member of our team will contact you shortly!****I need to transition my existing face-to-face program to an online format****Program Name:****Program Level:****Discipline:****Anticipated Online Program Launch Date:****Please indicate preferred availability for an in-person consultation:****Monday**☐ Morning☐ Afternoon**Tuesday**☐ Morning☐ Afternoon**Wednesday**☐ Morning☐ Afternoon**Thursday**☐ Morning☐ Afternoon**Friday**☐ Morning☐ Afternoon**A member of our team will contact you shortly!****I am a faculty member (or oversee faculty) who need(s) training to team effectively in an online format****How many individuals require training?****Please indicate preferred availability:****Monday**☐ Morning☐ Afternoon**Tuesday**☐ Morning☐ Afternoon**Wednesday**☐ Morning☐ Afternoon**Thursday**☐ Morning☐ Afternoon**Friday**☐ Morning☐ Afternoon**A member of our team will contact you shortly!**

Tool 2: Memorandum of Understanding Template

Tool Overview

While the launch of new programs represents a key component of any COE unit's growth strategy, the process requires effective communication and collaboration between many disparate groups, including but not limited to unit leadership, program faculty, marketing and recruiting teams, and the bursar's and registrar's office. The immense complexity and extended timeline of the launch process can easily lead to misaligned expectations and misunderstandings between involved groups that result in suboptimal post-launch program performance.

Physical documents enumerating the expectations and obligations of all parties involved in new program launch, including memoranda of understanding (MOUs), not only facilitate collaboration between these groups prior to launch, but ensure that each group understands its own responsibilities and the responsibilities of its peers. Further, MOUs help to prevent last-minute program cancellations due to low enrollments, allow academic partners to provide relevant and timely intelligence to inform marketing strategy, and ensure marketers are positioned to secure maximum enrollments by the program's start date.

Complete the following MOU template at least six to nine months prior to the launch of a new program to solidify expectations and responsibilities among stakeholders in unit, academic, and marketing with regards to program content, enrollment and financial projections, tuition and fees, funding, and support services, though Forum recognizes that the details included in this MOU will differ depending on the type and structure of the institution.

EAB's MOU Template is based on best practice research conversations conducted with the marketing and recruiting team at Florida International University Online, and thus some included examples reflect the policies in place at that unit at the time the research team conducted those conversations in 2015.

Memorandum of Understanding: [Program Name]

The purpose of this Memorandum of Understanding (hereafter referred to as "MOU") is to establish agreed upon responsibilities amongst the parties involved in launching and managing a graduate program.

Leadership representatives from the COE unit, academic program, and marketing and recruitment team should be involved in the completion and execution of this document.

Program

[Program name] (Hereafter referred to as "Program"), including all the below tracks/majors/minors/specializations/modular and stackable elements:

| Name | Number of Credits |
|------|-------------------|
| | |
| | |
| | |
| | |

Parties

1. **[Full name of COE unit]** (hereafter referred to as "COE Unit")
2. **[Full name of academic unit]** (hereafter referred to as "Academic Unit")
3. **[Any additional parties]**

Credits, Courses, and Duration

The Program will hold a **[class offering structure]** and will consist of **[number]** credits per student offered through **[number]** courses over a period of **[number]** months. Courses will be **[number]** weeks in duration, and students will complete **[number]** courses per **[number]** week period.

- Include any course quality specifications or requirements (e.g., Quality Matters guidelines for online programs), if applicable.

Effective Dates

The terms of this MOU will be effective through **[number of years]** from the date of the last signature on this MOU, after which the terms will remain in effect unless otherwise notified in writing by either party.

Start Date

The Program will launch in the **[semester of start]** semester (hereafter referred to as "Launch Semester"), which will be the first semester when students will be admitted into the Program.

After the Launch Semester, the Program will admit new students every **[number]** semesters. Any change in the semesters when the Program will admit new students must be agreed upon in writing by both parties listed above.

Tuition and Fees

The Program will be offered at a tuition and fees price of **[dollar amount]**, or **[dollar amount]** per credit. Any change in price of the Program must be agreed upon in writing by both parties listed above.

Funding

Enumerate any unit-specific fees, revenue sharing agreements, and additional financial risks, requirements, obligations, or considerations for either or both parties.

Example from Florida International University Online

- As a service charge for the development, design, delivery, and support of online courses, FIU Online will collect \$120 per instance of enrollment.
- As a marketing and recruitment service charge, FIU Online will collect [percentage] of total revenues of the Fully Online Program.
- The Academic Unit will be responsible for all university fees (Bad Debt Expense, Academic Affairs, Financial Aid, etc.) related to managing a market rate or self-supporting program, which at the time of the signing of this MOU the fees are:
 - Enumerate any such fees

It is understood that during the first [2 years] of the Program, the Program will accept new students every semester and run operations, even if operating under a loss.

- Use this clause to ensure that program leadership and associated faculty expectations regarding program profitability are clear.

Enrollment

The enrollment goals of the Program per semester are specified below, along with corresponding minimums and maximums. The Program must launch in the given semester if the enrollment minimum is met.

Any change in the enrollment goals must be agreed upon in writing by both parties listed above.

| Semester | Enrollment Goal | Enrollment Minimum | Enrollment Maximum |
|---------------|-----------------|--------------------|--------------------|
| Year 1 | | | |
| Fall | [Number] | [Number] | [Number] |
| Spring | [Number] | [Number] | [Number] |
| Summer | [Number] | [Number] | [Number] |
| Year 2 | | | |
| Fall | [Number] | [Number] | [Number] |
| Spring | [Number] | [Number] | [Number] |
| Summer | [Number] | [Number] | [Number] |

Obligations of the Academic Unit

Outline the one-time and ongoing responsibilities of the Academic Unit to supporting the continued operation of the Program.

FIU Online Example:

- The Academic Unit is responsible for planning, coordinating, executing, and funding the below resources or tasks prior to the launch of the Program.
- After the launch of the Program, as continued management, the Academic Unit is responsible for maintaining and funding the below resources or tasks. Any changes to any of the below resources or tasks, must be shared with COE Unit, preferably prior to the change taking place, but mandatorily at most two weeks after a change takes place.

Administrative Support:

- Appointment of full-time Program Manager for the Program, responsible for all bilateral communications between parties above related to marketing, recruitment, faculty, and course management.
- Completion of COE Unit New Program Questionnaire (available as a separate tool).

Admission:

- Confirmation of admission requirements and financial aid options.
- Management of admission processes, including application review matters.

Courses:

- Plan, coordination, execution, and support for any internships, fieldwork, clinicals, practicums, workshops, or similar curriculum matters.

Faculty and Instructors:

- Development of faculty and instructor staffing plan to support course development timeline.

Additional Requirements at FIU Online:

- Support for faculty abidance of COE Unit quality standards during the development and execution of courses
- Abidance of policies and procedures as described on The Florida International University Board of Trustees and United Faculty of Florida Collective Bargaining Agreement
- Support for faculty abidance to complete COE Unit trainings, including the following trainings, or the current version of these trainings since the date of signature of this MOU: First steps in teaching online, Introduction to Online Teaching, Blackboard: Fundamentals

COE Unit Obligations and Services

Outline the one-time and ongoing responsibilities of the COE Unit to supporting the continued operation of the Program.

FIU Online Example:

COE Unit is responsible for planning, coordinating, executing, and funding the below resources or tasks prior and after the launch of the Program.

- Learning Management System
- Faculty training on online teaching
- One-on-one instructional design between COE Unit instructional designer and Academic Unit faculty
- Marketing and Recruitment
 - Program webpage on COE Unit website
 - Marketing and advertisement campaigns
 - Lead-to-student cycle management
- Student and faculty technical support
- Guidance on Academic Unit new hires as supporting the program

Conclusion and Agreement

Academic College Dean Signature

Date

COE Unit Dean Signature

Date

Tool 3: Prelaunch Faculty Program Questionnaire Builder

Tool Overview

New program launches constitute a key component of any COE unit's growth strategy, and faculty members possess a unique understanding of how new programs align with institutional academic strengths and serve unmet student and employer needs. While faculty members are typically able and willing to assist marketers and recruiters in understanding and positioning the program to secure maximum enrollments, COE units often lack a formal process for gathering this information. Standardized questionnaires that solicit information related to program content, student profiles, and competitive positioning ensure that the marketing team possesses all the relevant information it requires to develop a successful marketing campaign in advance of a new program launch.

Use the following questionnaire to solicit insights from program leadership and associated faculty members. The academic unit may elect to have each faculty member complete a separate questionnaire, or elect a representative to complete a single questionnaire for the group.

The Forum recommends marketing leadership receive all responses to this survey at least six months prior to the newly launched program's application deadline. For improved completion rates, the Forum recommends developing a web-based version of the questionnaire that allows respondents to complete single sections at a time, save their work, and return at a later date to complete additional sections.

Program Information

What is this program's name?

What other names might prospective students use to refer to this program?

What are this program's admissions requirements?

What are the program's financial aid options? Are scholarships available?

What are the program's completion requirements?**What do you estimate to be the average time to completion?****What is the total number of courses the program will offer?****What is the total number of credit hours the program will offer?****Will this program be offered in a cohort format?****What will be the total number of cohorts or new starts offered per year?****Does this program offer any stackable or modular components?**

Program Tracks [Modify to include stackable or modular elements as necessary]

Please list the tracks that will be offered under the program with additional corresponding information:

| Track Name | Launch Semester | Number of Credits | Number of Courses | Academic Department |
|------------|-----------------|-------------------|-------------------|---------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Faculty

How many faculty will be teaching in the new program?

Implementation Note:

- Depending on the nature of your unit or the program in question, ensure the faculty chosen to teach the new program have experience delivering programs to nontraditional student audiences, and in different formats (e.g., online, hybrid).
- Best practitioner institutions offer training modules to support faculty members teaching in new or unfamiliar environments for nontraditional students

Please share any major achievements by faculty or instructors teaching in the program, for use in promotional materials:

Enrollment and Semesters

Please complete the table below to answer the following questions:

- After the launch semester, during which semester will the program admit new students?
- What is the program's enrollment maximum capacity per semester (at what point would you start denying admissions for that semester because of insufficient capacity)?

Work with your marketing and enrollment management contacts to answer the following questions:

- What is the program's enrollment goal per semester (how many new students would you like to enroll every semester)?¹
- What is the minimum number of enrollments this program must secure to remain viable?²

| Semester | Semester Month | Semester Year | Enrollment Goal | Enrollment Minimum | Enrollment Maximum |
|-----------------|----------------|---------------|-----------------|--------------------|--------------------|
| Launch Semester | | | | | |
| Semester Two | | | | | |
| Semester Three | | | | | |
| Semester Four | | | | | |
| Semester Five | | | | | |

1) Base enrollment goals on realistic analyses of demonstrable market demand.

2) Specified enrollment minimums ensure that the program launches in a given semester if it receives adequate demonstrated student interest.

Competitive Intelligence

Who are your peer and aspirational competitors? How does [Institution] compare to each?

Competitor 1

Competitor 2

Competitor 3

Competitor 4

What similar programs might a prospect consider? Does [Institution] offer any of those programs?

Program Positioning

What words or phrases would a prospective student use to search for this program?

What are the unique value propositions or selling features of this program?

Of the above, what is the single most important factor for a prospect selecting this program to know?

Which courses would stand out to a prospective student trying to make a decision?

Please share any rankings information related to the program, faculty, school, etc., with source provided:

Student Profiles and Motivations

What do you expect your student demographics (e.g., age, years of work experience) to be?

Why would an individual apply to this degree? What is his/her motivation to seek this program?

What would deter or prevent a prospective student from applying to or enrolling in this program?

What job or type of job does a typical prospective student have at the time they apply and enroll?

What job or type of job does a typical prospective student hope to attain after graduation?

Please provide any information you may have on media consumption for your program's applicant profile:

Professional associations of which prospective students might be members

Events and conferences prospective students might attend

Magazines and websites prospective students subscribe to or read

Other information you possess:

Industry

With which industry/industries does this program most closely align?

What is this industry's outlook in terms of employment, salary potential, etc.?

Are there specific geographic regions within the US and internationally that exhibit higher-than-average demand for this program, or the skills imparted by this program?

Additional Information

Who will be our team's main point of contact during the marketing, recruitment, and admissions process?

How would you like to receive recruitment and enrollment reports for this program?

Who should receive these reports?

Tool 4: Experimental Marketing Funds Business Case Builder

Tool Overview

In an ever-changing media environment, prospective students consume information across a variety of channels that constantly rise and fall in popularity and levels of traffic. Marketers must constantly adjust the mix of channels in which they choose to invest to ensure that their message reaches the correct audiences. Frequent experimentation—testing new channels and modifying the level of investment in existing channels—allows marketers to be more responsive as state of the art practice rapidly evolves. But while using a small portion of the marketing budget to experiment with new marketing channels and strategies is increasingly standard practice in the private sector, allowing companies to maintain a visible profile on cutting edge channels, higher education has been slow to replicate such behavior.

Culture of Experimentation

“Marketers feel the pressures, and in some cases understand what they should do, but lack the confidence that they will succeed. They’re anxious about understanding ahead of time what makes for good creative and smart digital strategies, managing complexity, and measuring real impact. Plus, so much of marketing today is a moving target. **You have to get in there and play and learn. The challenge is getting comfortable with risks. Set aside a portion of budget—10% to 20%—and really try new things.**”

David Edelman
Global Co-Leader, McKinsey Digital, McKinsey & Company

Short business cases are an increasingly common means to advocate for investment in new strategies while mitigating the innate aversion to risk that many institutions possess. Marketing directors and their team possess a wealth of knowledge of current marketing strategy, but understanding of new and emergent channels related to particular programs or student audiences often lie outside of their realm of expertise or knowledge. Faculty members and subject matter experts understand where their students are most likely to search for or learn about a new academic opportunity, and are well positioned to identify and surface strategies to reach those students to the marketing team. A small experimental marketing budget, available on a first-come-first-served basis to program stakeholders who complete a small business case, democratizes access to marketing investment while also maintaining parameters on the amount of money invested in new channels.

Use this short business case template to govern access to experimental marketing funds to invest in a new marketing channel or strategy for a single program. Any individual (e.g., faculty member, staff member) may complete and submit the business case in full, but the director of marketing should retain full authority to decide which proposed ideas receive investment. For best results, stipulate a total amount of experimental funding available (i.e., 5% to 10% percent of the total marketing budget).

The Business Case

Brief Executive Summary

In three to five sentences, describe your proposed marketing strategy, approach, or channel. As specifically as possible, explain how this investment will increase inquiries, applications, and enrollments in a particular program, or contribute positively to the COE unit's brand overall. How does this proposed strategy differ or improve upon existing channels?

Detailed Description of Proposed Channel or Strategy

Describe the strategy or channel you are proposing in detail. Why do you anticipate this channel or strategy will be successful?

Anticipated Costs and Level of Effort

Describe the amount of money, labor, and staff time required to invest in this proposed channel or strategy.

How Will You Define Success, and What Are Your Expected Outcomes?

What metrics would you recommend to determine the success of this new channel or strategy?

Tool 5: 360-Degree Program Assessment Template

Tool Overview

When programs struggle to meet enrollment expectations or grow as quickly as expected many administrators are unsure of how to accurately pinpoint what barriers are preventing greater enrollments. Program faculty, marketing, and frontline staff all possess unique insights into academic quality, program content, marketing strategy, and prospective student preferences, but taken separately each group's perspective represents just one component of overall program performance. Each group interacts with students at a different point in the enrollment process, and thus each group possesses unique insights to help diagnose barriers to enrollment. Administrators should prioritize a holistic analysis all three groups' perspectives, rather than look to only one group to strengthen an existing program singlehandedly.

This questionnaire is designed to solicit insight from faculty members, marketing, and frontline staff separately. Each group's section contains two parts: the first part includes questions that that group alone is uniquely positioned to answer, while the second part includes questions common to all three groups to illuminate commonalities and distinctions in answers between groups. Group-specific questions ensure that survey administrators glean the widest range of program insight possible, while questions common to all groups allow for the comparison of answers provided to assess investigate discrepancies or commonalities between each group's perspective.

Each group should complete the questionnaire separately before convening to discuss commonalities and, especially, discrepancies between different groups' responses. Use subsequent all-group meetings as collaborative brainstorming sessions to diagnose and consider solutions to identified barriers to enrollment and identify program or marketing modifications.

Faculty Questionnaire

Questions for Faculty

Program Content

Please describe the program's topical focus area(s):

Please enumerate any special program features (e.g., experiential learning, unique facilities):

Program and Faculty Accolades

Please enumerate any faculty awards, program rankings, or other accolades:

Student Profiles

Please describe the demographics of students (e.g., age, gender, professional and educational attainment) you hope to enroll more of in this program:

Why have you not enrolled the above type of student before?

What about the program do students find most valuable?

What about the program do students find least valuable?

Questions for All Groups

Target Audience

Please describe the demographics (e.g., age, gender, professional experience) of students currently enrolled in this program (be as specific as possible):

Student Motivations for Enrollment

What aspects of this program are uniquely valuable compared to other similar available programs?

What are the goals or career aspirations of students who enroll in this program?

What barriers most commonly prevent students from applying to and enrolling in this program?

Competitors

What institutions represent this program's primary competition?

What are the primary reasons a prospective student would choose a competitor program over this program?

Marketing Approach

On which social media channels are prospective students most likely to spend the most time?

What other informational resources (e.g., trade journals, listservs) are prospective students likely to consume?

How do students hear about this program?

What types of organizations are most likely to hire this program's graduates?

To which professional organizations or other groups, if any, do students who typically enroll in this program belong?

Marketing Questionnaire

Questions for Marketing

Marketing Efforts to Date

Through which marketing channels or strategies do you secure the greatest number of leads, applications, and enrollments for this program?

Why do you believe these channels or strategies have been the most effective to date?

In what specific ways, if any, has the efficacy of certain marketing channels changed over time?

Have certain marketing channels or strategies become more expensive over time? If so, by how much?

In what ways has the profile of prospective students changed over time?

What additional markets of prospective students exist for this program, if any (e.g., new geographic regions, new employers or job titles)?

What strategies would you consider to increase enrollment among new prospective student markets?

Opportunities for Growth

On a scale of 1 to 10 (10 being the greatest opportunity) how would you rate this program's opportunity to increase enrollments in its current market?

Please explain in detail why you submitted the above rating?

What additional marketing strategies would you consider to increase enrollment among the current student demographics?

Questions for All Groups

Target Audience

Please describe the demographics (e.g., age, gender, professional experience) of students currently enrolled in this program (be as specific as possible):

Student Motivations for Enrollment

What aspects of this program are uniquely valuable compared to other similar available programs?

What are the goals or career aspirations of students who enroll in this program?

What barriers most commonly prevent students from applying to and enrolling in this program?

Competitors

What institutions represent this program's primary competition?

What are the primary reasons a prospective student would choose a competitor program over this program?

Marketing Approach

On which social media channels are prospective students most likely to spend the most time?

What other informational resources (e.g., trade journals, listservs) are prospective students likely to consume?

How do students hear about this program?

What types of organizations are most likely to hire this program's graduates?

To which professional organizations or other groups, if any, do students who typically enroll in this program belong?

Frontline Questionnaire

Questions for Frontline Staff

Barriers to Enrollment

Why do prospective students who inquire about this program fail to submit an application?

Why do students who submit an application to this program fail to enroll?

Do certain program requirements (e.g., application fees, GRE requirements, work experience requirements) prevent students from applying to, or enrolling in, this program?

What strategies would you recommend to remove or ease these barriers?

Program Deficiencies

What are the most common services (e.g., career services, student support) prospective students ask for that we do not currently provide?

What are the most common program components or features (e.g., online, experiential learning) prospective students ask for that we do not currently offer?

What related programs, specializations, or electives do prospective students seek that we do not currently offer?

Questions for All Groups

Target Audience

Please describe the demographics (e.g., age, gender, professional experience) of students currently enrolled in this program (be as specific as possible):

Student Motivations for Enrollment

What aspects of this program are uniquely valuable compared to other similar available programs?

What are the goals or career aspirations of students who enroll in this program?

What barriers most commonly prevent students from applying to and enrolling in this program?

Competitors

What institutions represent this program's primary competition?

What are the primary reasons a prospective student would choose a competitor program over this program?

Marketing Approach

On which social media channels are prospective students most likely to spend the most time?

What other informational resources (e.g., trade journals, professional listservs) are prospective students likely to consume?

How do students hear about this program?

What types of organizations are most likely to hire this program's graduates?

To which professional organizations or other groups, if any, do students who typically enroll in this program belong?

Tool 6: Inquiry Mining Worksheet

Tool Overview

Two primary opportunities exist to collect information from prospective students: physical or web-based request for information forms (RFIs), and direct interactions between the prospective student and a recruiter. Each one of these interactions represents an opportunity to learn more about student program needs, motivations for enrollment, program competition, marketing strategy, and even larger-scale trends in market demand. This information can then be used to guide new program development, marketing investment, and ultimately, enrollment growth. Unfortunately, often due to high volumes of inquiring prospective students, many individuals in recruiting positions use these interactions to screen unqualified students or those that desire an academic program not yet offered at the institution, and triage qualified students to their program of interest.

The following worksheet provides a short, easy-to-use taxonomy of high-impact information that can be collected from prospective students from RFIs or direct contact in person or via phone or email. Ensure that your unit's CRM or other lead tracking mechanism or software includes title, employer, and program of Interest fields so recruiters can track this information over time.

Distribute this worksheet to all faculty and staff responsible for interacting with prospective students at any stage in the enrollment process. The document can either be used as a physical worksheet to be filled out with prospective student responses during each direct interaction, or as a conversation guide including question prompts to extract program and market insight from prospective students during direct interactions.

It is important to note that while the data gathered directly from prospective students (e.g., title, program of interest, motivations for enrollment) is immensely important, of equal interest is the information that does not appear. For example, if a marketing strategy targets professionals at certain employers, but employees at those companies fail to inquire and apply in significant numbers, recruiters can use this form to submit such intelligence back to the marketing team, which can adjust its strategy accordingly.

The Tool

Mining Information from an RFI or Registration Field

| Form Field | Relevance |
|--------------------------------|---|
| Title | Titles or positions that occur frequently indicate opportunities to develop new programs or reposition existing offerings to serve this emergent market segment |
| Employer (if available) | Interest from multiple individuals with the same employer could indicate an opportunity to partner formally with that organization |
| Program of Interest | Even prospective students that do not ultimately apply or even enroll at the institution can provide directional information regarding which programs are most popular or desirable |

Mining Information from a Direct Prospect Interaction

| Topic | What to Listen For | What to Ask | Prospect Response |
|--|---|---|-------------------|
| High-Impact Marketing Channels | Platforms or channels mentioned in relation to program search, including where prospect first heard about the program | <ul style="list-style-type: none"> Where did you first hear about this program? What was the last program-related resource you viewed before contacting us? Where do you go first to research new academic programs you are interested in? | |
| Competitive Intelligence | Other institutions the prospect is considering or has applied to | <ul style="list-style-type: none"> Where else are you looking? Where else have you applied? What do you like about Institutions X, Y, Z? | |
| Diagnosing Barriers to Enrollment | Prospect fears, concerns, hesitation, or other reasons for inaction | <ul style="list-style-type: none"> How can we make your application process easier? What is the greatest barrier to you hitting "submit application" right now? What are your biggest concerns about applying at this time? | |
| New Program Development | Skills, courses, certificates, or programs the prospect seeks that your institution does not currently offer | <ul style="list-style-type: none"> Is there anything else you're looking for that we do not currently offer? In what ways do our current offerings not meet your needs or expectations? | |

Tool 7: “Create a New Class Hackathon” Agenda

Tool Overview

Frontline staff members (e.g., recruiters) work directly with prospective students, screening unqualified candidates and triaging qualified students to their program of interest. These individuals possess firsthand knowledge of the types of programs and other educational opportunities that prospective students are interested in, and understand what in-demand programs prospective students seek that the unit does not yet offer. Unfortunately, at many institutions, COE unit and marketing leaders have few opportunities to transform these insights into actionable ideas for new programs, or modifications to existing programs.

Gather your frontline and recruiting staff together to brainstorm ideas for new programs or new modifications to existing programs. The agenda below can be used as a prompt to facilitate this brainstorming, and encourage frontline staff to treat prospective student feedback as market research and intelligence to guide new program development. By speaking for the “voice of the customer,” frontline staff are uniquely positioned to offer market-driven idea for new programs or new modifications to existing programs.

The Forum recommends adjusting the number of teams, activity duration, and any other pertinent detail in order to meet the needs of your organization. Be sure to record everyone’s ideas, even the ideas that do not align to current programs in development or under consideration. Any information your frontline staff members submit can and should be catalogued to help track trends in student demand over time.

Agenda Template

Suggested Attendees

All staff engaged in recruiting prospective students into existing programs, including all people in different departments and schools that can help manage prospective student inquiries and requests.

Instructions

Each team is competing to create and launch a new COE program.

The program must meet a demonstrated need of current or prospective students, corresponding to a question or complaint that frontline staff have received in the past three months. For example, “I’d love to take ‘X’ but I can’t commit to that many weeks.” Or, “Do you offer anything in ‘Y’?”

To encourage generative, creative program ideas participants may assume that no barriers exist regarding faculty hiring, pay, space, ancillary staffing, technology, etc. **However, priority will be given to new program ideas that take these constraints into consideration.**

Each team will have 10 minutes to brainstorm, 2 minutes to vote on a choice, and 30 minutes to design the program, incorporating all of the elements listed on the reverse side of the page.

Each team will then take no more than 3 minutes to “pitch” their program idea to the rest of the group.

Program Proposal

| Program Information | |
|--|--|
| Program Title | |
| Program Discipline | |
| Length/Format/ Location | |
| Target Audience | |
| Learning Outcomes | |
| Three Key Benefits (Discuss Unmet Needs This Program Meets and/or Problems it Solves) | |

Tool 8: Integrated Enrollment Marketing Template

Tool Overview

While organizational roles and responsibilities can differ by unit, no one individual or group is solely responsible for securing program enrollments. It requires the coordinated effort of multiple organizational functions such as marketing, admissions, academic departments, academic support, and IT to successfully engage students from inquiry through to post-graduation. Unfortunately, facilitating this coordinated effort can present major challenges for many units, especially those who rely on main-campus services for academic support, admissions, or other functions.

Use this template, and the example plan on page three, to develop an integrated enrollment marketing plan that aligns the efforts of each major organizational function with each stage of the student lifecycle. The plan should be as specific as possible in describing each group's efforts, and unit leaders should assign metrics and goals to each of those efforts and track efficacy over time. To begin, consider what part(s) of the enrollment funnel your unit currently struggles with the most and how investing more in a particular organizational function, or experimenting with different strategies for that function to pursue, could make a positive impact on that stage in the enrollment cycle.

COE leadership should conduct begin this activity by assigning strategic priorities to the enrollment map, and then consult leaders from each functional group represented to determine which activities and operations will have the most positive impact on the determine strategic priorities.

Operational Note

In the example marketing plan on page three of this document, activities are listed in boxes. The unit's overall strategic priority at each stage of the prospective student journey appears in the topmost row. Each subsequent row below refers to the operations of a specific organizational function (e.g., marketing, admissions, IT).

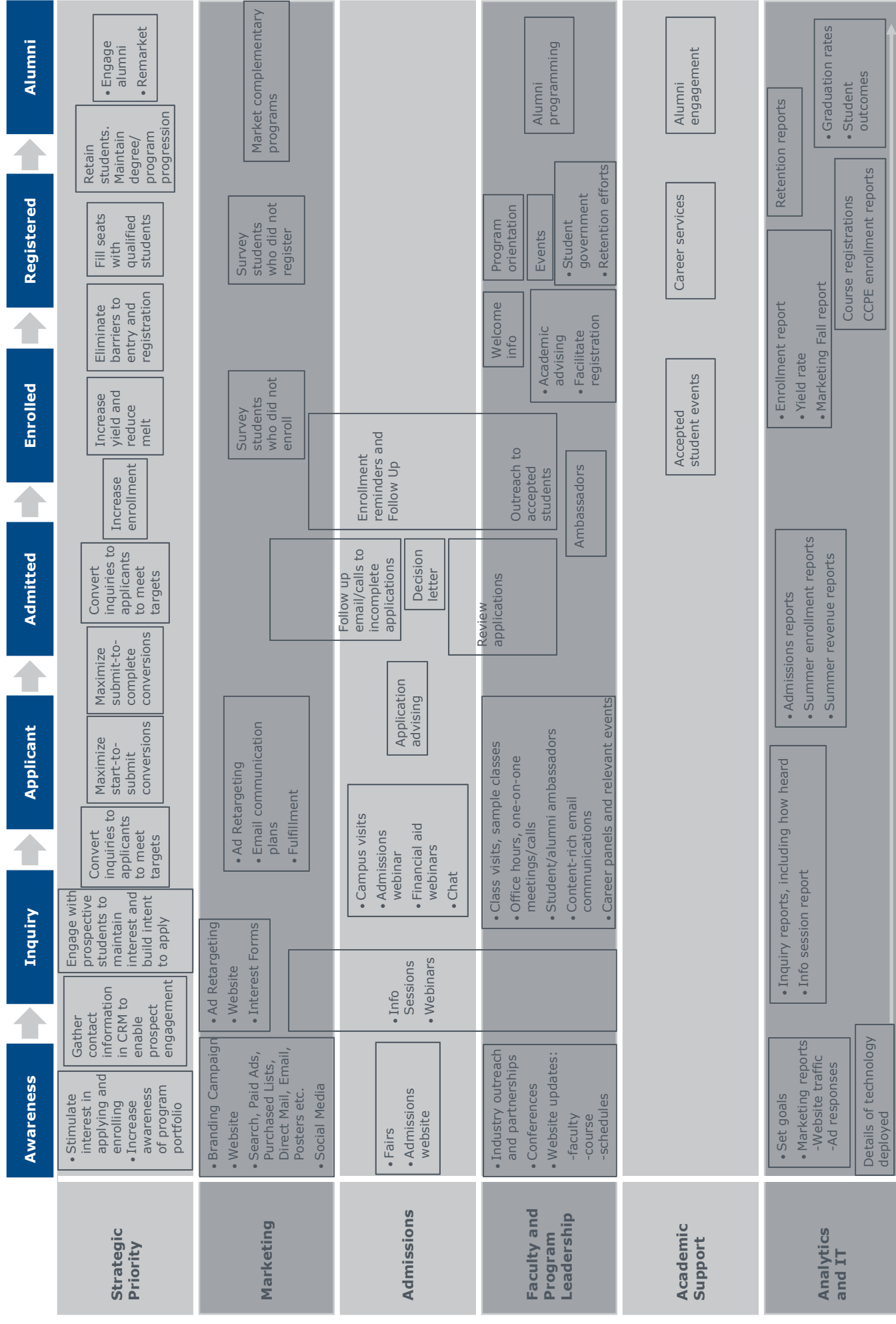
Box length (i.e., distance from top to bottom) illustrates which organizational function (e.g., marketing, admissions) is responsible for executing the activity listed. If the activity is the responsibility of more than one team, the box should span the corresponding functional areas on the template.

Box width (i.e., distance from left to right) indicates the duration of the given activity, corresponding to the stage in the student lifecycle. Activities may span multiple stages of the student lifecycle, and the width should correspond accordingly.

Student Lifecycle Marketing Template:

| | Awareness | ↑ | Inquiry | ↑ | Applicant | ↑ | Admitted | ↑ | Enrolled | ↑ | Registered | ↑ | Alumni |
|--------------------------------|-----------|---|---------|---|-----------|---|----------|---|----------|---|------------|---|--------|
| Strategic Priority | | | | | | | | | | | | | |
| Marketing | | | | | | | | | | | | | |
| Admissions | | | | | | | | | | | | | |
| Faculty and Program Leadership | | | | | | | | | | | | | |
| Academic Support | | | | | | | | | | | | | |
| Analytics and IT | | | | | | | | | | | | | |

Example



Tool 9: Digital Marketing Channel Primer

Tool Overview

This two-part tool helps identify the demographics of individuals active on various social media platforms according to the Pew Research Center's study on the demographics of key social networking platforms³, and offers an introductory primer to common marketing channels.

Part 1, Social Media Demographics and Trends: Understanding that demographics on social media, and even popular social media channels themselves, are subject to almost constant change, this tool's first part offers demographic information for five common social media channels—Facebook, Twitter, LinkedIn, Instagram, and Pinterest—and insight into how these demographics have changed over the past few years.

Part 2, Digital Marketing Channel Primer: The second part of this tool offers a brief primer on other common digital marketing platforms and strategies, to educate non-marketing staff and faculty members about different approaches to promoting academic programs.

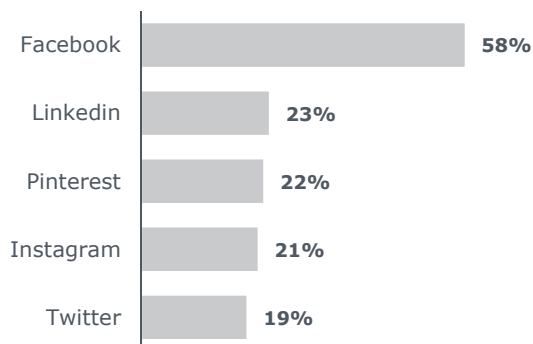
Part 1: Social Media Trends and Key Takeaways

The following key findings from [Pew Research's 2014 Social Media Update](#), the most formal and robust investigation of social media usage by US adults, offer insight into changing digital behavior:

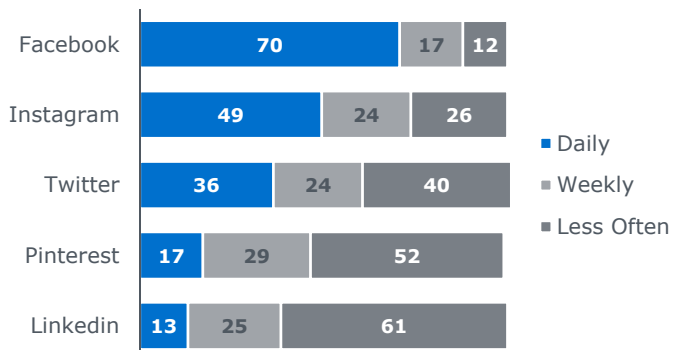
- Multi-platform use is on the rise: 52% of online adults now use two or more social media sites, a significant increase from 2013, when it stood at 42% of internet users
- 52% of online adults use multiple social media sites. Facebook acts as "home base"—it remains the most popular site for those who only use one, and has significant overlap with other platforms.
- While Facebook remains the most popular social media site, its overall growth has slowed and other sites continue to see increases in usership.

While the study focused on internet users, and the proportion of which who are active on various social media platforms, the following data represent social media activity within the entire US adult population (i.e., aged 18 and over).

Social Media Usage Among All Adults



Frequency of Site Usage by Platform Users⁴



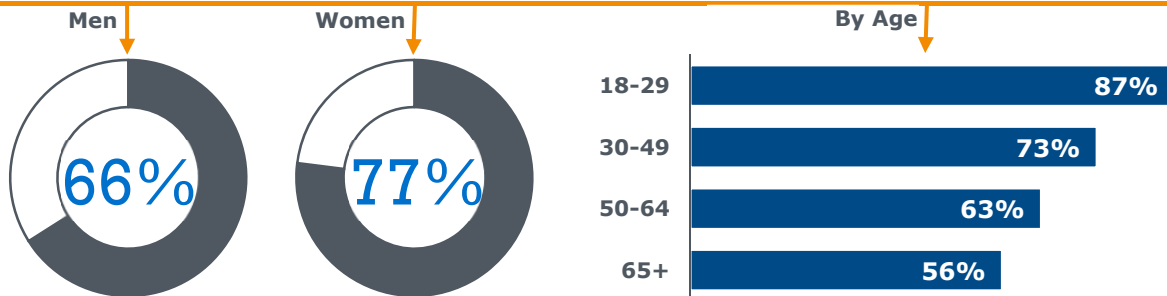
3) Pew Research Center Internet Project, [Social Media Update](#)

4) Percentage is relative to all that platform's users, so 70% of Facebook users use the site daily

Source: "Social Media Update" Pew Research Center, http://www.pewinternet.org/files/2015/01/PI_SocialMediaUpdate20144.pdf

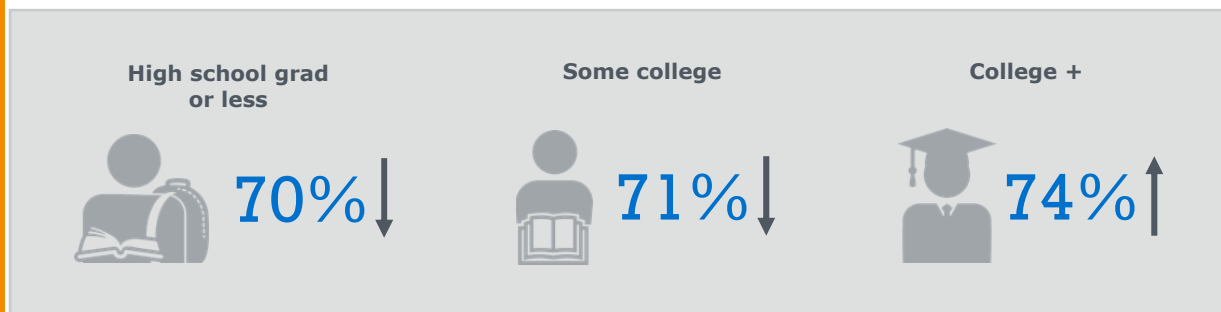
Facebook Usage Among U.S. Adult Internet Users

- 71% of US adult internet users use Facebook, while 58% of the entire US adult population uses Facebook
- Usage among internet using adults aged 65+ grew 11% from 2013, the only statistically significant increase recorded



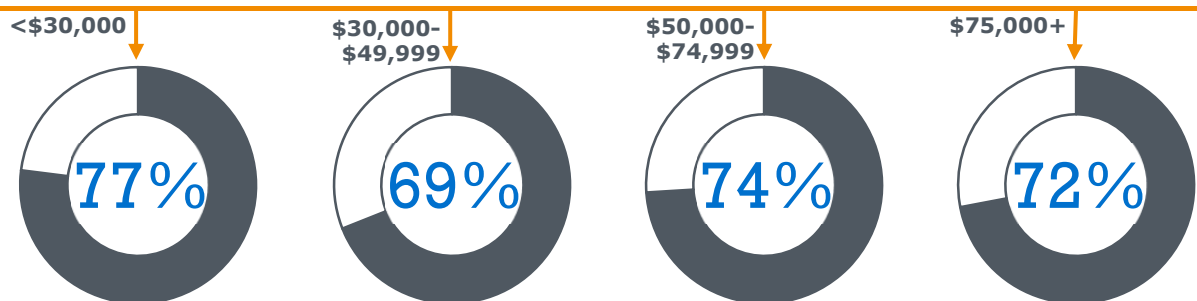
Facebook Usage by Educational Attainment

- Usage among internet using adults with a college education or higher increased by a statistically significant margin between 2013 and 2014



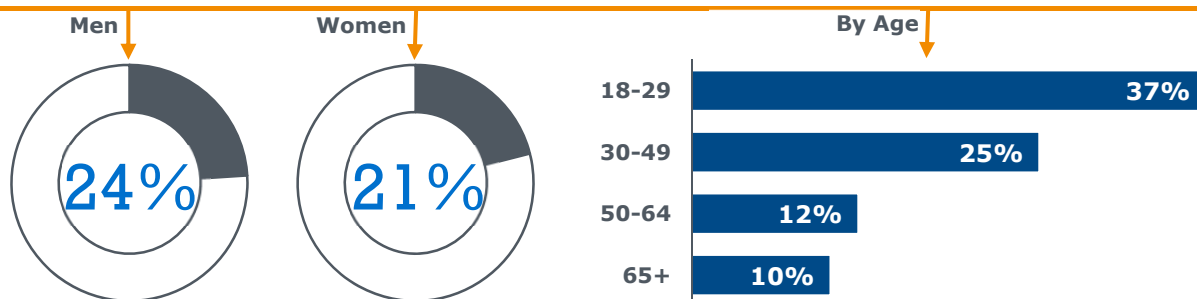
Facebook Usage by Geography and Income

- Usage among internet using adults remains fairly consistent across various geographies:
 - Urban: 71%
 - Suburban: 72%
 - Rural: 69%



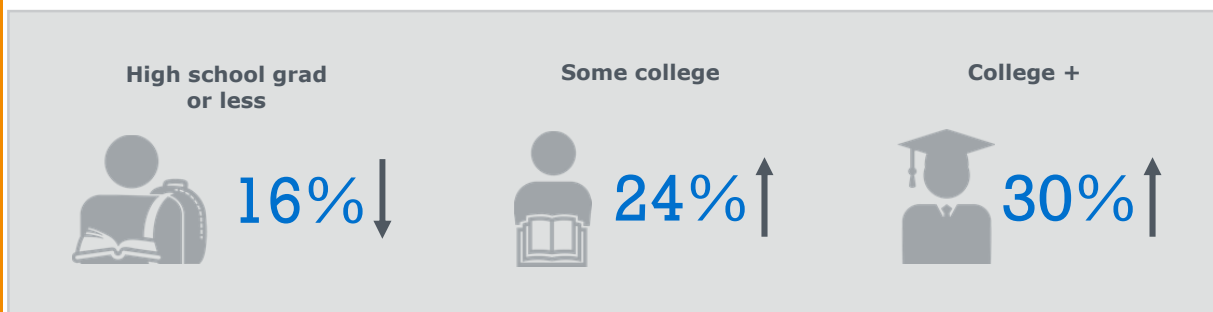
Twitter Usage Among US Adult Internet Users

- 23% of US adult internet users use Twitter (a statistically significant increase from 18% in 2013), while 19% of the entire US adult population uses Twitter
- Usage among internet using men, and adults aged 65+, grew by statistically significant margins between 2013 and 2014



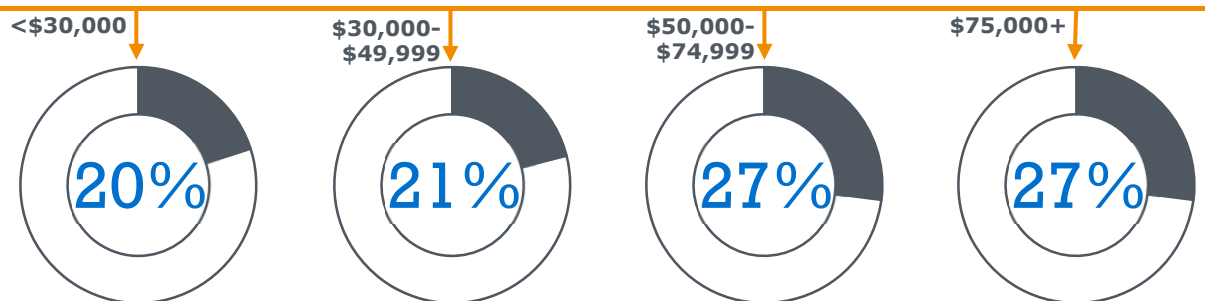
Twitter Usage by Educational Attainment

- Usage among internet using adults with a college education or higher increased by a margin of 12% between 2013 and 2014, the only statistically significant change recorded



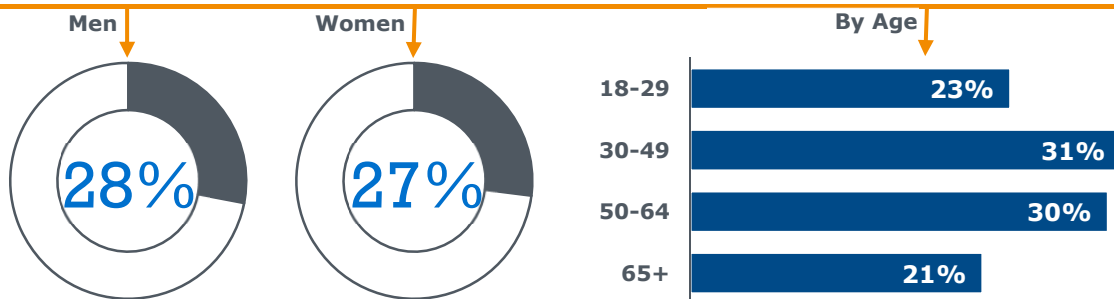
Twitter Usage by Geography and Income

- Usage among internet using adults earning \$50K or more, as well as those in rural geographies, increased by statistically significant margins between 2013 and 2014:
 - Urban: 25%
 - Suburban: 23%
 - Rural: 17%



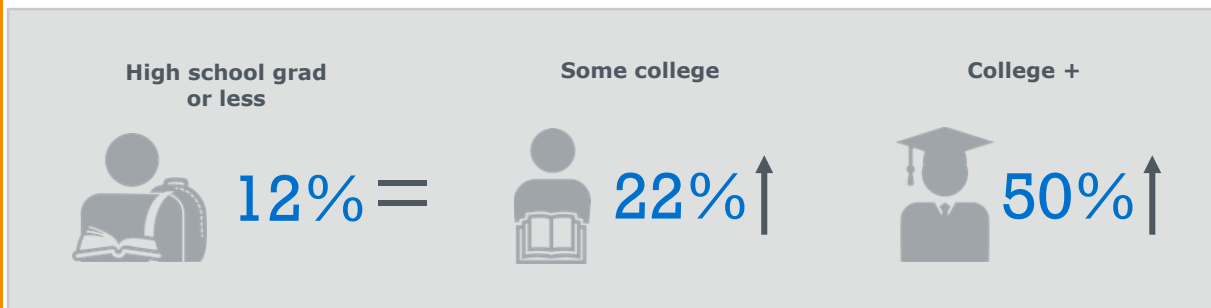
LinkedIn Usage Among US Adult Internet Users

- 28% of US adult internet users use LinkedIn (a statistically significant increase between 2013 and 2014), while 23% of the entire US adult population uses LinkedIn
- Usage among internet using women, adults aged 18-29, and adults aged 64+ increased by statistically significant margins between 2013 and 2014



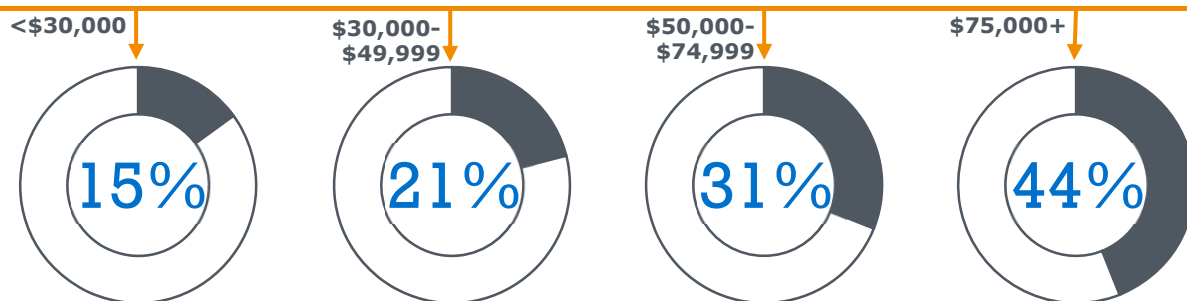
LinkedIn Usage by Educational Attainment

- Usage among internet using adults with a college education or higher increased by a statistically significant margin between 2013 and 2014



LinkedIn Usage by Geography and Income

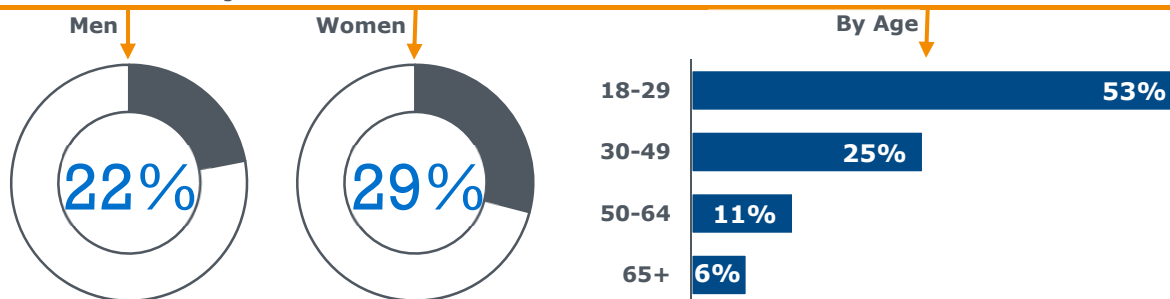
- Usage among internet using adults in urban geographies, and internet using adults earning between \$20,000 and \$49,999 increased by statistically significant margins between 2013 and 2014:
 - Urban: 32%
 - Suburban: 29%
 - Rural: 14%



Instagram

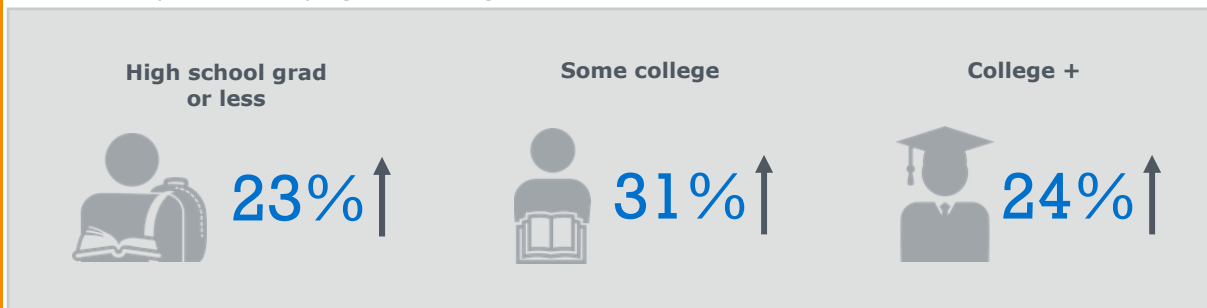
Instagram Usage Among US Adult Internet Users

- 26% of US adult internet users use Instagram (a statistically significant increase from 2013 to 2014), while 21% of the entire US adult population uses Instagram
- Statistically significant increases in Instagram usage occurred for internet using men and women across all age brackets



Instagram Usage by Educational Attainment

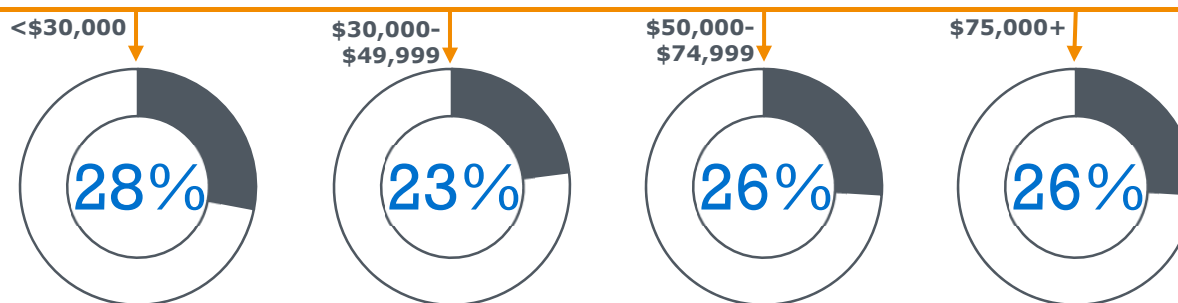
- Usage among internet using adults across all categories of educational attainment increased by a statistically significant margin between 2013 and 2014.



Instagram Usage by Geography and Income

- Usage among internet using adults in suburban and rural geographies, as well as internet using adults earning less than \$30,000 and over \$50,000 increased by a statistically significant margin:

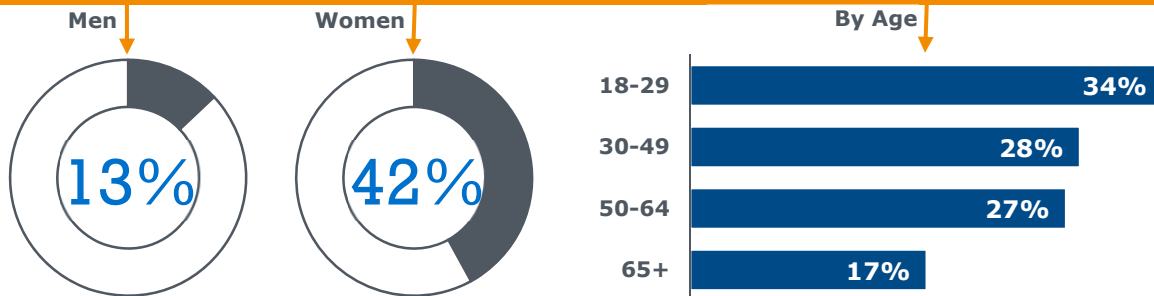
- Urban: 28%
- Suburban: 26%
- Rural: 19%



Source: "Social Media Update" Pew Research Center,
http://www.pewinternet.org/files/2015/01/PI_SocialMediaUpdate20144.pdf

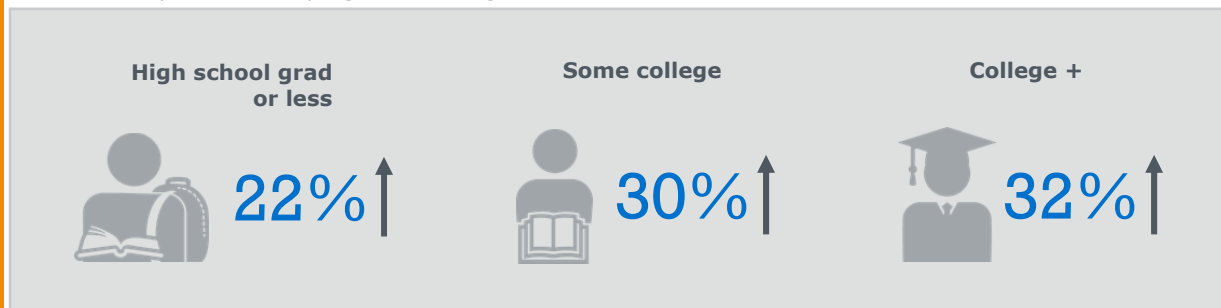
Pinterest Usage Among US Adult Internet Users

- 28% of US adult internet users use Pinterest, while 22% of the entire US adult population uses Pinterest
- Usage among internet using men and women, and internet using adults aged 50 and over grew by statistically significant margins from 2013 to 2014



Pinterest Usage by Educational Attainment

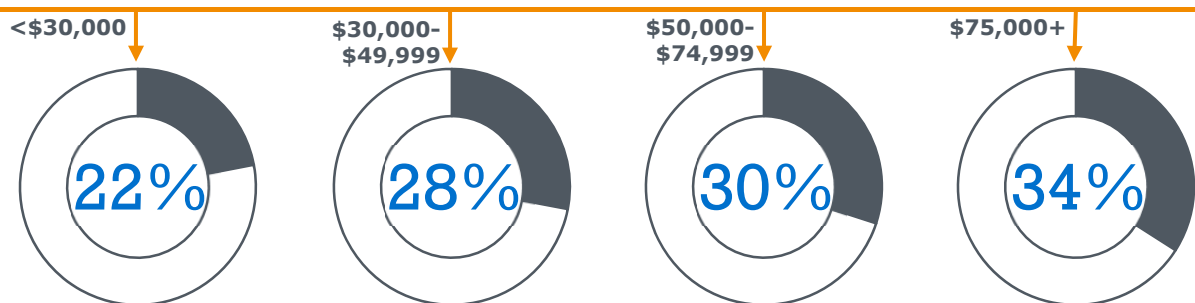
- Usage among internet using adults with some college or a college degree and higher increased by a statistically significant margin between 2013 and 2014



Pinterest Usage by Geography and Income

- Usage among internet using adults in suburban and rural geographies, and among internet using adults earning less than \$30,000 and over \$75,000 increased by statistically significant margins between 2013 and 2014:

- Urban: 25%
- Suburban: 29%
- Rural: 30%



Part 2: Other Common Digital Marketing Channels

Display Advertising

- Advertisements placed on third-party websites with the goal of creating brand awareness and/or generating inbound traffic.
- Examples: Banner ads, video ads, interactive ads.

Email Marketing

- Collecting email addresses from potential leads and marketing to them via email messages.
- Examples: Email newsletters, brand building emails, conversion-focused emails.

Search Engine Optimization (SEO)

- Earning rankings in the "organic" results of the major search engines (Google, Yahoo!, Bing) by emphasizing top search terms in website HTML and copy, and maximizing links to and from a website and other trusted web sources.
- Examples: Keyword research, HTML optimization, link building.

Pay-Per-Click Advertising (PPC)

- Bidding for top placement on search engine results to earn visibility and traffic when users perform relevant queries.
- Examples: Google Adwords, Yahoo! Search Marketing.

Public Relations

- Generating media from high-visibility outlets in order to earn brand recognition and inbound traffic.
- Examples: Billboards, television, radio spots, internet media focused PR agency work.

Affiliate Marketing

- Incentivizing other websites to push prospective students to your website in exchange for a flat fee, scaled rate, or share of the revenue they generate.
- Examples: Gradschools.com.

Content Marketing

- Generating creative content to authentically spread a branding or marketing message and earn engagement and traffic.
- Examples: Blogging, listicle production, viral videos.

Conversion Rate Optimization (CRO)

- The process of improving the path from landing to conversion to generate more leads, registrations, applications, and students.
- Examples: Split and multivariate testing, click-through-rate improvements, purchase-process simplification.

Social Media Marketing (SMM)

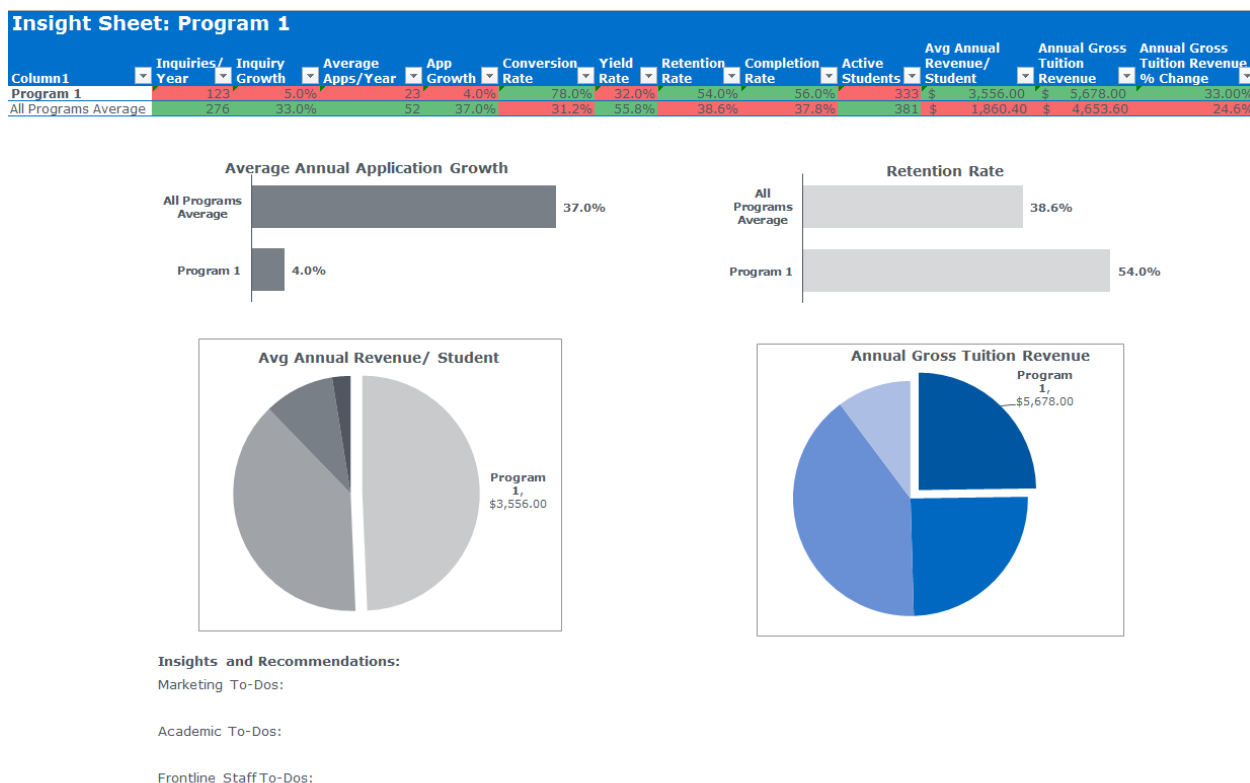
- The process of leveraging social media platforms to earn visibility and traffic.
- Examples: Facebook Group pages, Twitter marketing, promoted Instagram posts.

Tool Overview: Insight Sheets

Once COE unit leaders use the Program Performance Dashboard to determine each individual program's comparative performance across key metrics and identify programs with the most promising opportunities for enrollment growth, they must communicate actionable recommendations to each program's leadership to guide and facilitate that growth. However, simply sending a dense spreadsheet to faculty members does not provide the context or information necessary to empower program leadership to make adjustments to their program content, format, or strategy to spur additional enrollment growth, and risks alienating low- and mid-performing programs. Individual program Insight Sheets provide an easy-to-consume format for COE leadership to deliver concrete insights and recommendations to program leadership that combines quantitative benchmarking data and qualitative information from multiple program stakeholders.

The top portion of each program's Insight Sheet, also available on eab.com, should be populated with the individual program's quantitative performance data compared to portfolio-wide benchmarks. Associated bar and pie charts can be modified to highlight the most important metrics for program leadership to consider and attempt to inflect. The bottom portion of each program's Insight Sheet should contain concrete recommendations for marketing, faculty, and frontline staff to improve program performance. Please see the Marketing Across the Program Lifecycle tool 5, "360-Degree Program Assessment Template," and tool 6, "Inquiry Mining Worksheet," for strategies to collect actionable program-related insight from marketing, faculty, enrollment management, and frontline staff to supplement quantitative benchmarking data for the "insights and recommendations" portion of the insight sheet tool.

Insight Sheet Snapshot⁶



6) Numbers randomly generated to illustrate populated insight sheet.



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