Recruiting the Silent Funnel

Prompting Inquiry, Increasing Yield, and Capturing Re-enrollments

COE Forum

COE Forum

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About the COE Forum

Serving Continuing, Professional, and Online Education Leaders

Our Parent Firm: The Advisory Board Company

Founded in 1979 to serve hospitals and health systems, The Advisory Board Company is one of the nation's largest research and consulting firms serving nonprofit, mission-driven organizations. With a staff of over 2,500 worldwide, including 1,150 in Washington, D.C., we serve executives at over 3,800 member organizations in more than two dozen countries, publishing 150 major studies and 15,400 customized research briefs yearly on progressive management practices.

Our Broader Work in Higher Education: The Education Advisory Board

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

Research and Insights

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

Business Affairs Forum
Research and support for college and university chief business officers in improving administrative efficiency and lowering costs.

Student Affairs Forum
Research for student affairs executives on innovative practices for improving student engagement and perfecting the student experience.

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

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

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

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

Student Success Collaborative™
Predictive modeling, degree tracking, and support to help institutions improve student retention and graduation success.

A Unique Approach

Research Identifying Breakthrough Practices

Beyond Averages: Over 100,000 Interviews Across the Firm

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

Our Research Process

Literature Review and Expert Interviews	Exhaustive Screening for Breakthrough Practice	In-Depth Case Study Research	Rigorous Analysis and Recommendations
A massive literature review and extensive interviews with all relevant experts, in and out of sector, provide a deeper understanding of root cause problems and help identify potential new ideas.	Interviews are conducted with hundreds of colleges and universities to isolate the few dozen that have pioneered truly innovative practices and can show demonstrable results.	Multiday interviews and onsites are completed with these exemplar institutions to understand in detail how the practices work and the implementation requirements, benefits, and potential drawbacks.	The research team spends several months synthesizing the research and preparing detailed recommendations to guide members in how to implement the practices and strategies uncovered in the research.

Supporting Members in Practice Implementation

Beyond This Publication

We see this publication as only the beginning of our work to help members develop their marketing and recruiting strategies. Recognizing that ideas seldom speak for themselves, our ambition is to work actively with COE Forum members to decide which practices are most relevant for your organization, to accelerate consensus among key constituencies, and to save implementation time.

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

Unlimited Expert Troubleshooting

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

Recorded and Private-Label Webconference Sessions

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

Customized Market Research

All Forum members are entitled to personalized market research projects that identify new program opportunity areas, validate demand for new offerings, or offer guidance on refreshing and repositioning existing programs.

Facilitated Onsite Sessions

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

Advisors to Our Work

COE Forum

The COE Forum research team is grateful to the individuals and organizations that shared their insights, analysis, and time with us. We would especially like to recognize the following individuals for being particularly generous with their time and expertise.

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Top Lessons from the Study

Recruiting the Silent Funnel

The Challenge: An Increasingly Silent Funnel

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. Prospective COE students face no shortage of options given the increasingly competitive landscape for professional and online education. 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. **Delayed Prospect Identification Renders High-Touch, High-Frequency Recruiting Increasingly Irrelevant:** While the decision timeline for adult students has always been unpredictable, delayed identification and the rise of stealth shopping has resulted in a "silent funnel." With prospects less likely to self-identify early in their decision-making process, marketing and recruiting staff have limited opportunities to engage, cultivate, and ultimately convert leads.

3. **Program and Capacity Planning Frustrated by Last-Minute Inquiries and Applications:** As prospects delay inquiry in favor of an extended independent browsing period, inquiry volumes tend to spike closer to the application deadline, rendering it difficult for staff to manage responses and accurately project enrollments. Deans, program directors, and faculty are frustrated by this ambiguity when planning instructional capacity, section size, and whether they will have sufficient enrollments to offer a particular course in the next term.

4. **Redirecting Marketing & Recruiting's Focus—Increasing Yield from Warm Leads:** As demand for COE programs no longer exceeds supply and traditional advertising methods have become more expensive and less effective, growth through a lead-generation strategy alone has reached a limit. By shifting attention to nurturing and converting the qualified leads already populating the recruitment funnel, institutions can grow enrollments, often at a lower cost.

5. **Three Disciplines for Recruiting the Silent Funnel:** Based on more than 250 research conversations, this report highlights three disciplines prioritized by the most progressive institutions to prompt inquiry earlier in the decision making process, increase yield among existing leads, and capture re-enrollments.

   a. **Prompting Early Inquiry**: Encourage silent prospects to identify earlier through redesigned website and mobile site features that serve web visitors with varied information needs and personalize the independent search process.

   b. **Restarting Stalled Applications:** Redirect staff efforts from lead generation to nurturing warm prospects who have begun, but not completed, applications. Targeting communications and outreach at this high-impact moment drives forward momentum toward completing an application and, ultimately, enrollment.

   c. **Recommending "Smart" Next Steps:** Gain insight into student preferences and career paths to stay top of mind for the occasional buyer and facilitate repeat enrollments.

Top Lessons from the Study (cont.)

Recruiting the Silent Funnel

Prompting Early Inquiry

6. **Recruiting Begins—and Often Occurs Entirely—on the Web:** Educational research and recruiting has largely moved online with the majority of prospects obviating conversations with staff in favor of independent, Internet-based research. While many institutions have invested in web and mobile redesigns, call-to-action strategy is largely still reliant on information scarcity, optimized to a request for information form that lacks a compelling reason for self-identification.

7. **Serving Silent Prospects Across an Extended Web-based Browsing Period:** As prospects conduct most of their program research and evaluation via the web, online content must address the needs and concerns of web visitors with varying goals at all stages of the decision-making process. There are two distinct phases of the extended, independent browsing period, and progressive institutions should design interactive web content that serve both:

   a. **Information Gathering:** Early-stage browsers who are undecided about the program or course of interest to pursue. These prospects are unlikely to self-identify because they are still undecided about their goals and, therefore, have yet to formulate a specific question and are unlikely to enroll in the near-term.

   b. **Application Preparation:** Late-stage browsers who have independently built their consideration set using readily available web content. These prospects are unlikely to inquire because they are confident they can rely solely on independent web research to inform their decision.

Breakthrough Practices

8. **Use Location-Based Geo-targeting to Customize Web Content:** Use IP address as a proxy for the preferences of web visitors to draw conclusions about the information needs of key demographics; modify page content and craft messages based on presumed prospect identity to increase likelihood of inquiry.

9. **Design Interactive Web Tools and Features to Engage Browsers:** Design interactive web tools to encourage prospect self-identification at distinct moments in the prospect's research process—initial information gathering and application preparation. During the information-gathering stage, offer features that help prospects to filter the portfolio and identify best fit options. For prospects in the application-preparation stage, offer features that help curate disparate but relevant information found during search. Connect the request for information form (RFI) with these interactive features and tools to facilitate self-identification.

10. **Initiate Interaction by Prompting Web Visitors to Live Chat:** Initiate conversations with anonymous web visitors through live chat. Silent browsers are more likely to discuss concerns and raise questions when recruiters acknowledge their presence on the website and invite them to ask for help. Cross-train existing staff to respond the inbound phone, email, and chat inquiries.

    Practice 1: Segment-Based Custom Webpages (page 28)

    Practice 2: Stealth RFIs (page 31)

    Practice 3: Proactive Live Chat (page 36)

Top Lessons from the Study (cont.)

Recruiting the Silent Funnel

Re-starting Stalled Applications

11. **Application Supplanting RFI as First Point of Contact:** As prospects circumvent the traditional inquiry process and proceed straight to application, the majority of institutions do not capitalize on prospects who start but do not complete the application process, leaving a significant pool of high-quality, warm leads largely ignored.

12. **Deploy Faculty and Instructors to Secure Enrollments from Committed Students:** Solicit faculty support in converting admitted—but unregistered—students who are still undecided about enrolling. Outreach from faculty is particularly influential in alleviating students' concerns about the academic rigor or outcomes of the program.

Breakthrough Practices

13. **Standardize Process to Convert Pending Applications:** Acknowledge all started applications with text, phone, or email outreach that provides clear next steps, reminds prospects of upcoming deadlines, and assigns a point of contact to assist with outstanding questions.

14. **Develop a Prospective Student's Profile through Progressive Email Follow-Up:** Embed calls to action in post-inquiry follow-up emails. Use intelligence gathered through responses to pre-qualify prospects for program fit, classify inquiries based on decision cycle, and schedule appointments with admissions counselors.

15. **Redeploy Sample Classes to Encourage Pending Applicants to Submit and Enroll:** Rather than broadly market sample classes to students who have already committed, target these high-impact events to mid-application prospects. Samples classes offer a more intense format than the typical information session, providing stalled applicants with exposure to program content and alleviating concerns about academic preparation or program fit.

16. **Invite Faculty to Call Admitted-but-Unregistered Students:** This outreach strengthens students' connection to the institution, alleviates lingering concerns, and reinforces program expectations to best position students for success.

Practice 4: Pending Applicant Outreach (page 43)

Practice 5: Progressive Post-inquiry Follow-Up (page 46)

Practice 6: Mid-Application Sample Class (page 52)

Practice 7: Pre-registration Faculty Phone-a-Thon (page 53)

Top Lessons from the Study (cont.)

Recruiting the Silent Funnel

Recommending "Smart" Next Steps

17. **Difficult to Propose Right Next Step at the Right Time:** As student career paths become more unpredictable and demand for short format credentials grows, institutions lack the capability to know when a student is most likely to need their next educational experience and what type of credential they will need.

18. **Challenge to Stay "Top of Mind" for Occasional Buyer:** Because students tend to pursue continuing and professional education infrequently and programs are not a recurring part of daily life, it is difficult for units to promote brand loyalty over time.

Breakthrough Practices

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

20. **Codesign Stackable Credentials with Current Students:** Invite program participants to participate in new-launch focus groups to inform course design and program planning; gain insight from current students on their goals and educational needs as they progress through their career.

21. **Incentivize Alumni to Update Profiles by Offering Personalized Professional Development Recommendations:** Design a portal that allows alumni to update their information and offers dynamic, personalized career and professional development recommendations that are aligned to their career goals and industry.

22. **Create Student Enrollment Profiles to Design Targeted Outreach:** Capture and code student interests using both pre-registration stated preferences and inferences from course history. Use these standard codes to identify potential participants for targeted announcements about new programs and courses.

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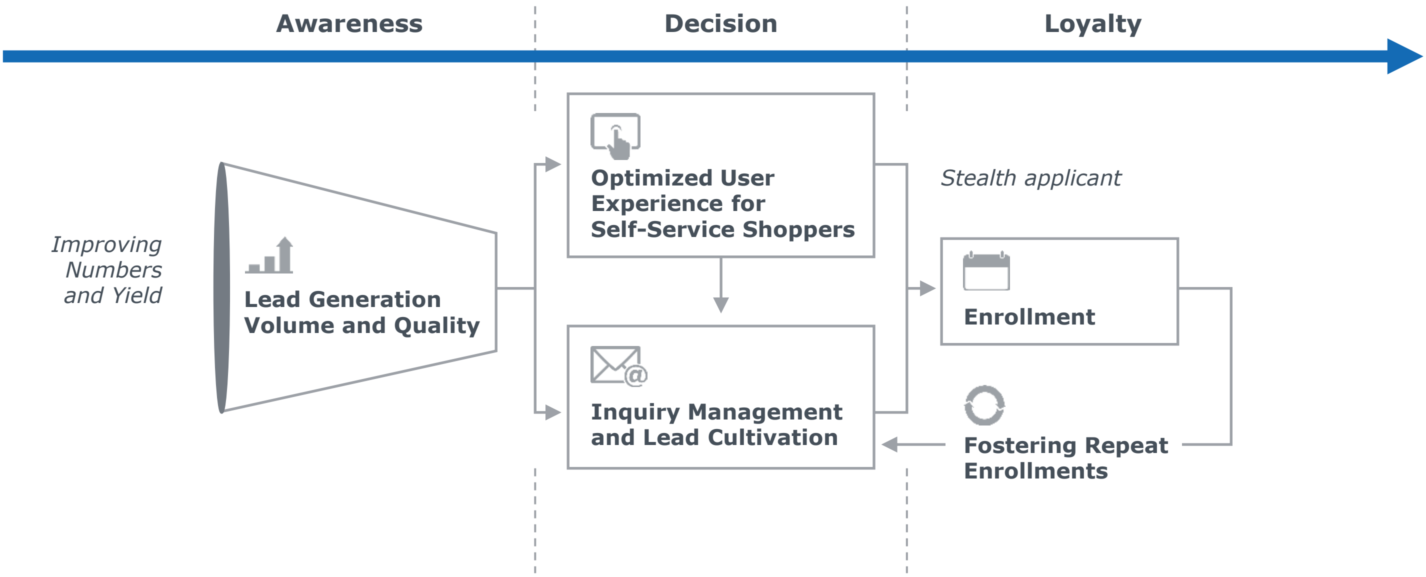
The Challenge

Recruiting the Silent Funnel

INTRODUCTION

Systemically Examining COE's Marketing Challenge



Immediately Available to Members

Lead Generation

- Disciplining Social Media Strategy (2012)
- International Social Media Recruitment (2012)
- Rewarding Word-of-Mouth Referrals (2013)
- Innovations in Try-Before-You-Buy (2014)

Self-Service Shoppers

- Web Presence Optimization Toolkit (2013)
- Adding Value in the Search Process (2014)
- Mobile Optimization Toolkit (2014)

Lead Cultivation

- CRM Implementation Toolkit (2013)

Repeat Enrollments

- Fostering Repeat Purchase Behavior (2013)

Since the launch of the COE Forum in 2011, best-in-class marketing and recruiting research has been a key pillar of the service, particularly as the discipline evolves and pressure mounts to secure enrollments. Today's competitive landscape offers prospective students seemingly limitless options to meet their educational needs, and, as a result, it has become increasingly difficult for COE units to capture and sustain market share. At the same time, adult enrollments are declining, intensifying the competition for every prospective student and necessitating state-of-the-art marketing and recruiting tactics.

The Forum has developed a vast library of resources, including studies and implementation toolkits, to support members across the recruitment funnel through replicable practices. State-of-the-art strategy in marketing and recruiting has changed rapidly as new technologies and disciplines shift from the private sector to higher education. The Forum's focus has also evolved just as the industry—and member questions—have advanced.

The graphic on the left highlights how existing COE marketing and recruiting resources map to member challenges across the funnel. Contact your dedicated advisor or visit eab.com/coe to obtain an electronic copy of these resources.

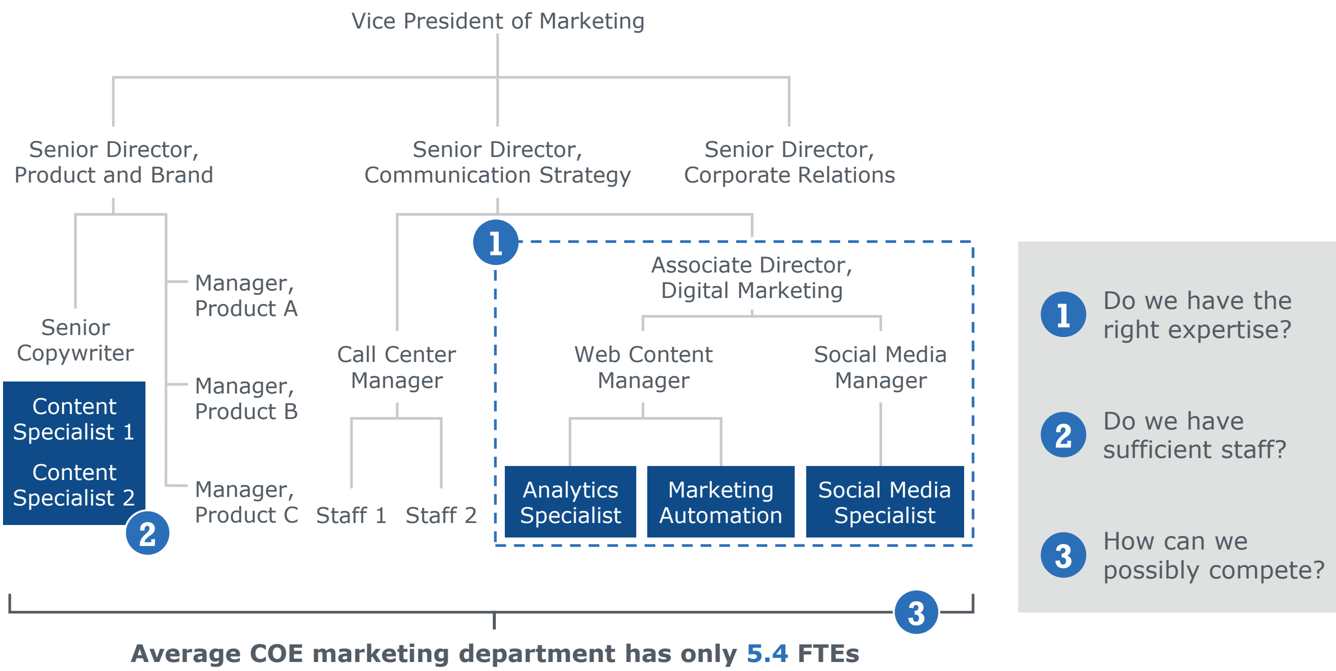
This latest study, *Recruiting the Silent Funnel*, examines the lead and inquiry management practices necessary to encourage earlier inquiry form prospects, increase conversions, and facilitate repeat enrollments.

Ideal Organization Out of Reach

Private Sector Marketing Capacity Far Exceeds Typical COE Unit

As the Forum first outlined in *Reaching "Search and Shop" Students*, prospective students are skilled online shoppers, adept at independently finding and comparing programs, often without the intervention of marketing and recruiting staff. At the same time competition for enrollments is intensifying, the path to student acquisition is also rapidly evolving. COE leaders have continued to adapt to meet the demands of today's "student shoppers," and as a result, many units have attempted to replicate the vast marketing organizations that private sector organizations deploy.

Typical Private Sector Marketing Organization



While this model may be well suited for specific COE institutions, it is out of reach for the vast majority. Given that the average size of COE marketing and recruiting functions is 5.4 FTEs, the reality is that staff resources are limited, and therefore it is unrealistic to design a strategy predicated on a robust organizational structure. Resource limitations have left many COE leaders wondering whether they have the right expertise to execute in today's competitive environment.

Source: UPCEA 2011 Marketing Survey Findings; EAB interviews and analysis.

Taking (the Wrong) Page from the Private Sector

In addition to attempts at replicating organizational models, many COE units have pursued other aspects of private sector marketing as well, often with limited results. The challenge is that, while some of these investments certainly have merit, they can distract from focusing on basic marketing and recruiting principles. In an effort to discover the "secret formula" in the private sector to solve their recruitment challenges, most units are underinvesting in the basics of lead management.

Attempts to Replicate For-Profit Marketing Tactics Met with Limited Results

(Over)investing in Recruiters

Large, public, online education unit adds 14 FTE recruiters in an effort to grow enrollments

Despite new positions, enrollment growth rate declines

Phoning in Three Minutes or Less

Small COE unit commits to have staff immediately call all new inquiries

A/B testing reveals that immediate phone contact no more effective in converting leads than email follow-up

Hiring in Private Sector Expertise

Marketing director hired away from for-profit university in hopes of uncovering new practices

New hire's first order of business is improving basic lead management

Corporate Espionage?

Facing increasing enrollment pressure from local competitors, COE unit sends marketing staff to "spy" on competitor's morning commute info sessions at local Starbucks

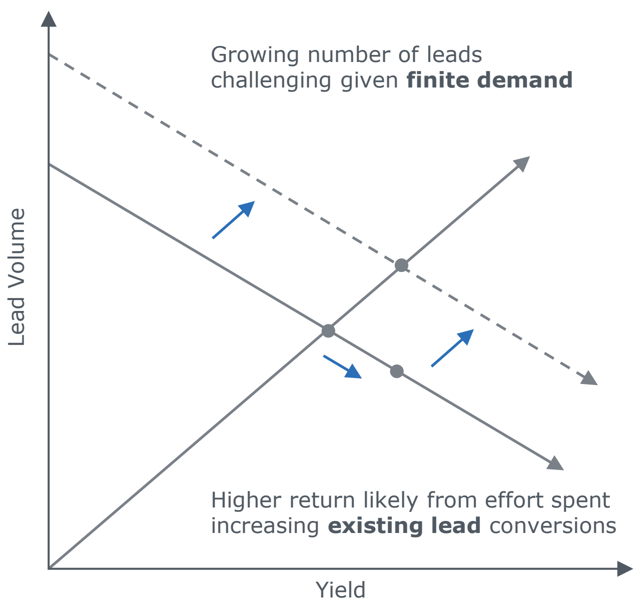
For example, a public online unit increased their dedicated marketing representatives from 1 to 14 over the course of the last several years, making a significant bet that additional staff would lead to exponential enrollment growth. Unfortunately, simply adding more staff to the marketing organization did not lead more students to inquire or enroll, and slower enrollment growth persisted. Another common tactic is attempting to replicate private sector speed to response metrics. While immediate phone contact is a differentiator for certain student demographics, it is not more effective in converting leads than email follow-up for most students. Finally, many institutions have hired marketing staff from the private sector in an attempt to gain new expertise and capabilities.

Source: EAB interviews and analysis.

Growth Through Volume Reaching a Limit

In an attempt to replicate private sector practices, many institutions have focused their strategies on lead generation. As demand no longer exceeds supply for COE programs, traditional advertising methods have become more expensive and less effective as more competitors enter the market. It is increasingly challenging to expand the portfolio to include new disciplines and reach new students based on a lead-generation strategy alone.

Effort Better Spent on Improving Yield



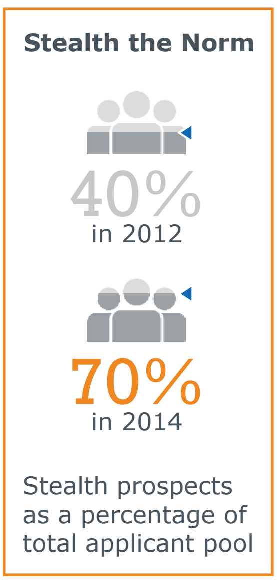
> You can either grow by casting a wider net and generate leads to fill the top of the funnel, or you can convert more of your existing qualified leads. In the past there was enough unmet demand, but that's no longer guaranteed. By focusing on increasing conversions, the unit can grow enrollment and likely at a lower cost.
>
> *Chief Marketing Officer, Private Online University*

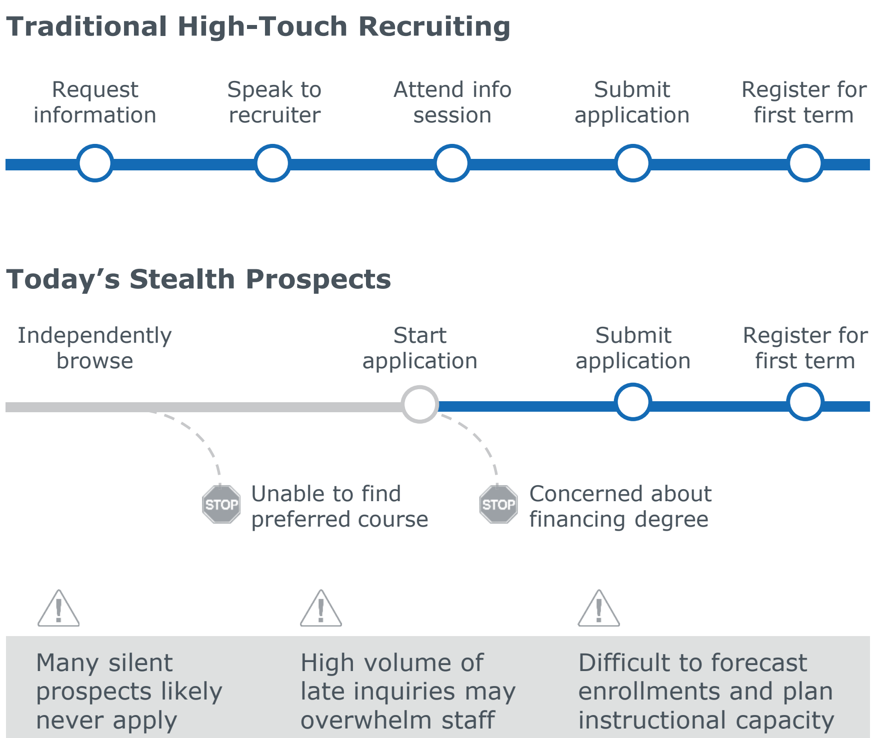
While these lead-generation strategies have populated units' databases with new prospects, there has been less emphasis placed on improving conversions among existing leads through operational efficiency and effectiveness. Relying on a top-of-the-funnel strategy to generate leads, without focusing on processes to improve conversions among the existing prospects populating the recruitment funnel, is ill-suited for the realities of today's COE environment.

Source: EAB interviews and analysis.

An Increasingly Silent Funnel

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 increasingly 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. 3) It is difficult to forecast enrollments and plan institutional capacity.

Source: EAB interviews and analysis.

Recruiting the Silent Funnel

Prompting Inquiry, Increasing Yield, Capturing Re-Enrollments

The marketing and recruiting breakthrough practices profiled in the pages that follow are the product of over 250 conversations with marketing and recruiting experts both within and outside higher education. The practices outlined in this study examine the lead and inquiry management strategies necessary to encourage earlier inquiry from prospects in the silent funnel, increase conversions, and facilitate repeat enrollments.

1

Prompting Early Inquiry

- Practice 1: Segment-Based Custom Webpages
- Practice 2: Stealth RFIs
- Practice 3: Proactive Live Chat

2

Restarting Stalled Applications

- Practice 4: Pending Applicant Outreach
- Practice 5: Progressive Post-inquiry Follow-Up
- Practice 6: Mid-application Sample Class
- Practice 7: Pre-registration Faculty Phone-a-thon

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Recommending Smart Next-Steps

- Practice 8: Next-Course Recommendations
- Practice 9: New-Launch Focus Groups
- Practice 10: Information Update Incentives
- Practice 11: New-Launch Target Market Profiles

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

Prompting Early Inquiry

PART 1

- Practice 1: Segment-Based Custom Webpages
- Practice 2: Stealth RFIs
- Practice 3: Proactive Live Chat

Key Insights

Prompting Early Inquiry

1. **Recruiting Begins—and Often Occurs Entirely—on the Web:** Educational research and recruiting has largely moved online with the majority of prospects obviating conversations with staff in favor of independent, Internet-based research. While many institutions have invested in web and mobile redesigns, call-to-action strategy is largely still reliant on information scarcity, optimized to a request for information form that lacks a compelling reason for self-identification.

2. **Serving Silent Prospects Across an Extended Web-based Browsing Period:** As prospects conduct most of their program research and evaluation via the web, online content must address the needs and concerns of web visitors with varying goals at all stages of the decision-making process. There are two distinct phases of the extended, independent browsing period, and progressive institutions should design interactive web content that serve both:

   a. **Information Gathering:** Early-stage browsers who are undecided about the program or course of interest to pursue. These prospects are unlikely to self-identify because they are still undecided about their goals and, therefore, have yet to formulate a specific question and are unlikely to enroll in the near-term.

   b. **Application Preparation:** Late-stage browsers who have independently built their consideration set using readily available web content. These prospects are unlikely to inquire because they are confident they can rely solely on independent web research to inform their decision.

Breakthrough Practices

3. **Use Location-Based Geo-targeting to Customize Web Content:** Use IP address as a proxy for the preferences of web visitors to draw conclusions about the information needs of key demographics; modify page content and craft messages based on presumed prospect identity to increase likelihood of inquiry.

4. **Design Interactive Web Tools and Features to Engage Browsers:** Design interactive web tools to encourage prospect self-identification at distinct moments in the prospect's research process – initial information gathering and application preparation. During the information-gathering stage, offer features that help prospects to filter the portfolio and identify best fit options. For prospects in the application preparation stage, offer features that help curate disparate but relevant information found during search. Connect the RFI with these interactive features and tools to facilitate self-identification.

5. **Initiate Interaction by Prompting Web Visitors to Live Chat:** Initiate conversations with anonymous web visitors through live chat. Silent browsers are more likely to discuss concerns and raise questions when recruiters acknowledge their presence on the website and invite them to ask for help. Cross-train existing staff to respond the inbound phone, email, and chat inquiries.

   Practice 1: Segment-Based Custom Webpages (page 28)

   Practice 2: Stealth RFIs (page 31)

   Practice 3: Proactive Live Chat (page 36)

A Web- and Mobile-First Recruiting Reality

Institutions' web and mobile sites increasingly represent the first and sometimes only source of information for potential students. As prospects increasingly "shop" institutions, the website has become a critical factor in the enrollment decision-making process. As Google highlighted in its 2012, *Education Trends Through the Eyes of Your Customer* report, 72% of prospects are visiting the website long before they take any action.

Education Research (and Recruiting) Trends

72%
of prospects visit the institutional website at least two weeks before taking action

25%
of prospects never look to sources outside the web

80%
of education search queries end without conversion

Perhaps even more concerning for education marketers is that 25% of prospects report that they do not consider any sources outside of the web. As institutions have invested in their web and mobile presence, the most sought-after information is now available online, inviting prospects to move straight to the application or registration stage, without requesting information from the institution.

The practices in this section aim to channel recent investments in web and mobile design to encourage prospects to inquire earlier in the decision-making process, providing marketing and recruiting staff with opportunities for engagement.

Source: Compete, Inc. U.S. Custom Education Study, Q3 2011.

A Personal Appeal to the Silent Web Visitor

ASU Online Uses IP Address as Proxy for Personal Preferences

As the website has become the first port of call for most prospects, web content must serve a diverse pool of potential students with varying information needs and interests. In the absence of any additional information, IP address can be used as a proxy for the preferences of web visitors to draw conclusions about the information needs of key demographics. For institutions with high volumes of prospects from specific geographic locations, this strategy can be used to modify page content and craft messages based on presumed prospect identity to increase likelihood of inquiry.

Message welcomes California site visitor

State-specific images

Prominent placement of pathways for California community college students

Testimonials and tips from fellow California Sun Devils

Through segment-based custom webpages, ASU Online designed different content for visitors from specific locations who are likely to have distinct information needs. One of their most successful custom webpages is focused on prospects from California. This site includes features and content that specifically acknowledge the visitor's location. Aesthetically, the state-specific iconography and imagery welcomes the California visitor. The site also prominently displays information on the pathway program for community college students, immediately connecting silent student shoppers with information that is most likely to meet their specific needs.

Source: ASU Online website, asuonline.asu.edu; EAB interviews and analysis.

Differentiated Sites Boost Inquiries

Prospects More Likely to Complete RFI When Site Speaks to Them

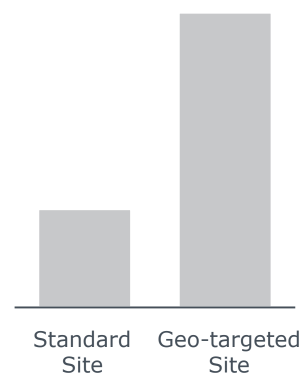
Since IP address can be used to glean information about a prospect's physical location, a number of options exist for customization, depending on the demographics of the prospect pool. In the case of ASU Online, Californians represent an important demographic in their prospect pool, but IP address can be used to predict information needs for a variety of location-based groups. Most COE units have spent time recently to develop content marketing and customized webpages that offer a way to deploy the information in the highest-value way.

Segment Customization Options

Out-of-State Prospects	Promote distance learning and regional sites over campus-based programs and events	• Regional locations • State authorization requirements • Tuition/fee differences
International Students	IP country code prompts multiple languages; displays differentiated requirements	• Visa and application requirements • TOEFL scores • Page translation
Active-Duty Military	Location-based geo-targeting identifies site visitors from military bases around the world	• PLA, credit transfer, transcript evaluation • Tuition benefits and financing options
Target Populations	Custom landing page linked to online ads designed to appeal to specific segments	• Testimonials from "people like you" • Specialized support services

Web-Generated Inquiries

A/B Test Results, ASU Online



Site prompts three times as many inquiries and double the page views

International students can be tracked through country codes, and custom sites could be translated into the native language or used to highlight visa requirements. IP address can also be used to identify active-duty military students and provide them with targeted information, including tuition, financing options, prior learning assessment, credit transfer, and transcript evaluations. Another option for customization is creating landing pages linked to online ads that are designed to appeal to specific student segments based on the webpage they are browsing.

While this approach has limitations and represents only an institution's best guess as to the prospect's information needs, the California-specific site at ASU Online increased the likelihood for prospect to receive relevant information and, as a result, has prompted three times as many inquires as the standard site.

Source: asuonline.asu.edu; EAB interviews and analysis.

Supporting Independent Search

Website Navigation Challenges Affect Early and Late-Stage Browsers

As prospects delay inquiry in favor of independent, online research, the expectation is for the website to serve prospects with varying goals at all stages of their decision-making process. The challenge is that prospects' information needs change as they build their consideration set. The Forum's research revealed two distinct phases of this browsing period—initial information gathering and application preparation; progressive institutions should design interactive web tools to encourage prospect self-identification at distinct moments in the prospect's research process.

Browsing Behavior

Information Gathering

- Unsure about programs or courses of interest
- Seeking information to help inform choice
- Unlikely to enroll in the near term

Need help **filtering** possible choices to zero in on best fit option

Application Preparation

- Synthesizing content from multiple sources
- Seeking information to confirm decision
- Likely to have already begun application

Need help **curating** disparate but relevant information found in search

The first student segment—information gathers—are early in the decision-making process and undecided about the program or course of interest to pursue. As COE portfolios have diversified, members have expressed concern that prospects may not be able to identify the best-fit option among a growing number of programs. These prospects are seeking information but have become increasingly less likely to self-identify, instead relying on the institution's website to inform their decision. During the information-gathering stage, prospects need help filtering the portfolio to identify best fit options.

In contrast, the second student segment—application preparers—are late-stage browsers. These prospects have generally been very engaged with the website, consuming readily available content and independently building their consideration set. These prospects need assistance synthesizing disparate information that they've found during the search process to confirm their decision.

The two practices that follow are strategies for engaging silent browsers by tailoring the web experience to meet their information needs to the extent possible and that prompt self-identification.

Source: EAB interviews and analysis.

Guiding Web Visitors to Find Best Fit Programs

JHU Carey Business School's Program Explorer

To more effectively engage the prospect independently browsing the web, the Johns Hopkins Carey Business School recently redesigned their website. One of the new features, Program Explorer, was developed with the information gathering prospect in mind. Program Explorer asks visitors a series of questions about their goals and preferences to populate a matrix of best fit program options with a corresponding call to action. This feature quickly engages the potentially overwhelmed prospect and helps to navigate and filter the portfolio, surfacing best-fit program options and encouraging earlier inquiry.

Six-Question Diagnostic…

Program Preference

1. Part-time or full-time
2. Time to completion

Preparedness and Fit

3. Highest degree obtained
4. Years of work experience
5. Academic and professional interests

Additional Information

6. "Why JHU" open response

Permits personalized follow-up in response to inquiry

…Populates Matrix of Best Fit Options

	Option A	Option B	Option C	Option D
Credits	36	54	42	64
Experience	None	2+ yrs.	5+ yrs.	2+ yrs.
Length	12 mo.	36 mo.	24 mo.	Self-paced
Campus	DC, Balt.	Baltimore	DC	DC
Focus	Marketing	Economics	Nursing	Mgmt.
Best For…	Biotech interest	Policy profs.	Career advancers	Skill growth
Benefits	Global curriculum	Blended format	Specialized focus areas	Capstone project
	RFI	***RFI***	***RFI***	***RFI***

Prominently placed on the center of the website, Program Explorer, includes a six-question diagnostic to understand the prospect's preferences, preparedness, and fit. Each question includes radio buttons with prepopulated responses to constrain options and simplify the matching process. Upon completion, respondents are provided with a matrix of four options with high-level information on program characteristics. As an added benefit, each call-to-action button is included below each description to encourage self-identification.

The one open response field offered, "Why do you want to pursue a business degree at the Johns Hopkins Carey Business School?" provides recruiters with helpful, qualitative information on prospects that can be used to facilitate more directed follow-up conversations.

Source: John Hopkins University Carey Business School, carey.jhu.edu; EAB interviews and analysis.

Benefits Beyond an Increase in Inquiries

Marketing, Prospects, and Program Directors Reap Rewards

Overall, the Carey Business School's website redesign resulted in a 200% increase in qualified leads, with 15% of all website leads generated by Program Explorer. Contacts noted that leads from Program Explorer are generally higher quality than those identified through other channels since these prospects have a better understanding of the portfolio and how their individual goals align with the portfolio. Prospects from Program Explorer are generally better equipped to quickly engage with recruiters, often pre-qualifying themselves. An unanticipated benefit has been that niche and new programs that prospects may not search for are surfaced for their consideration.

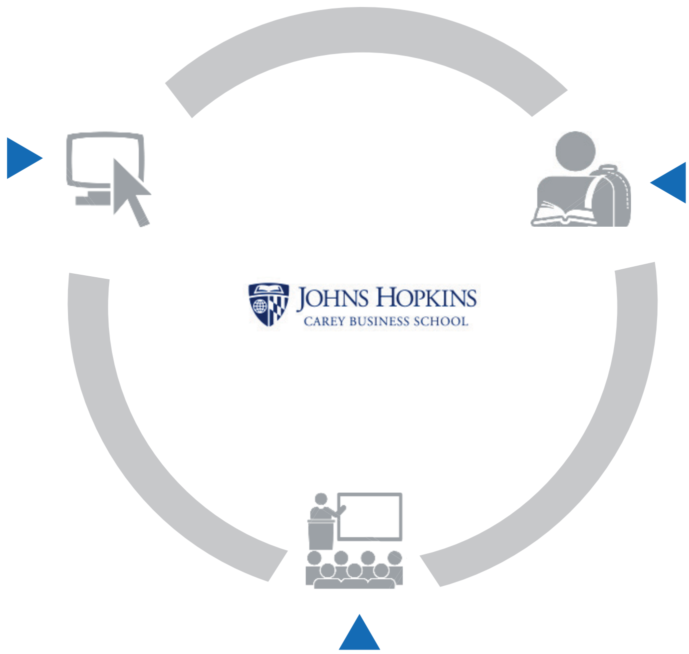
Marketing

200%

New website design increases qualified leads by 200%

15%

Program Explorer generates 15% of all website leads



Prospects

- Reduces time and effort needed to search for best fit programs
- Spend time collecting info only on programs that match preferences

Program Directors

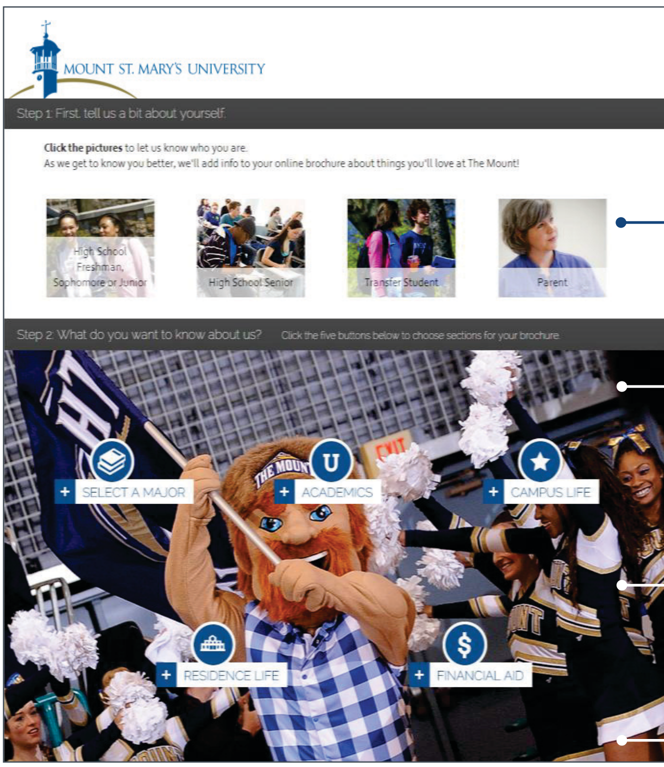
- Increases awareness of niche and new offerings
- Prompts inquiry from students most likely to succeed

Source: EAB interviews and analysis.

Design Your Own Marketing Collateral

Mount St. Mary's University Online Brochure Builder

As late-stage browsers begin to narrow their options and prepare applications, they are often overwhelmed by the volume of information gathered during their research. To help prospects distill and synthesize relevant content, Mount St. Mary's University redesigned their admissions webpage to include an online brochure builder provides web visitors with the option to design their own marketing collateral, displaying only that information that directly aligns with their interests and information needs.



Student Profile:
Prompt prospects to identify as a degree-completer, working professional, distance learner, or part-time enrollee

Field and Program of Interest:
Select from degrees, certificates, individual courses, and non-credit programming

Support Services and Outcomes:
Choose information on career outcomes, financial aid, and academic support services

Interactive Content Marketing:
Embed videos, blogs, photos, instructor profiles, and interactive content for a multimedia experience

A useful tool for prospects at various stages in the decision-making process, brochure builder is particularly impactful for late-stage browsers. The option to build a brochure is prominently displayed on the admissions webpage, linking visitors to an interactive microsite. Instead of simply providing prospects with all available information in a standard format, the site prompts visitors to answer a series of questions about the content that is most relevant in informing their decision.

While this specific example is focused on undergraduate students, the principles are easily transferrable to COE units by modifying the questions to more accurately align with the information needs of prospective students. Mount St. Mary's was able to leverage existing marketing collateral and code those materials to match the available brochure responses, requiring only one week to curate content.

Source: Mount St. Mary's Admissions website, mountadmissions.com; EAB interviews and analysis.

Brochure Follow-Up Form Serves as RFI

Prospect Choice for Brochure Delivery Indication of Lead Warmth

Brochure builder is a valuable resource for prospective students and has been particularly effective at encouraging previously silent web visitors to self-identify. In addition to adding value in the search process, the brochure builder includes three options for follow-up, providing prospective students with control over their future interactions with the institution. Information gathered after a prospect builds a brochure has been used to inform both individual recruiting interactions with prospects and long-term decisions about marketing channel and spend.

Three Levels of Post-brochure Follow-Up

Name:
Email:
Optional
Address:
City:
State: **Zip Code:**
Make My Brochure

1. Modifiable E-Copy
2. Hard Copy by Mail
3. Recruiter Phone Call

300+
Number of unique brochures made each year

25%
Portion of brochure builders who are new prospects

Near-Term Recruiting Benefits

- Admissions officer assigned based on prospect's location and/or program of interest
- Recruiter has insight into prospect's financial, career, and academic support priorities

Long-Term Marketing Wins

- Brochure trends influence ad, direct mail, web, and mobile marketing efforts
- Targeted direct mail expenses to highest value prospects

Prospects are prompted to complete a short form, similar to an RFI, after building a brochure. This form provides prospects with three options for follow-up that inform next steps and can also be used to pre-qualify lead warmth depending on the option selected. By just providing name and email address, prospects receive a modifiable e-copy of the brochure. For prospects who provide their mailing address, a hard copy version is mailed. By sending printed copies only to individuals who request them, Mount St. Mary's has been able to repurpose the resources previously expended on sending printed brochures to all prospects. Finally, if a prospect provides their zip code, the photo and contact information for their recruiter is included in the brochure and assigned for follow-up.

In addition increasing new inquires, the brochure builder has resulted in a number of short- and long-term gains for the marketing and recruiting functions. Specifically, recruiters now have insight into the interests and priorities of prospects based on their response, and marketing is able to monitor trends in brochure requests to inform messages and content development.

Source: Mount St. Mary's Admissions website, mountadmissions.com; EAB interviews and analysis.

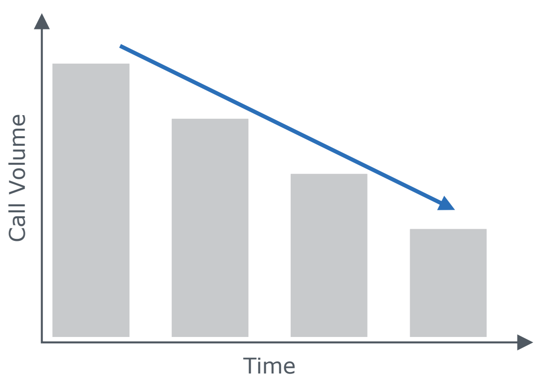
From Waiting for the Phone to Ring…

Change in Prospect Inquiry Behavior Creates Extra Capacity

As prospects circumvent the recruiting funnel in favor of independent research, the staff and processes that were developed to support a linear decision-making process are often underutilized. While prospects are still just as likely to have questions, they are not proactively reaching out to program staff, and instead relying on the website as their sole source of information. As inbound calls plummeted at one COE institution, leaders viewed the decreased volume as an opportunity to retrain staff to adapt to the new reality of online recruiting through live chat.

Inbound Call Volume Plummeting

Large, Private Research Institution



1,000 fewer calls each year for last three years

Underutilized Recruiting Staff

"Prospects aren't calling like they used to. We have all these staff available to answer the phones, but if calls continue decreasing, we won't be able to justify keeping them there. I've got plenty of other resource needs —how can I use these staff more effectively?"

Marketing Director for Online Education, Large Public Research Institution

While many institutions are actively considering or have implemented live chat due to its relative low cost and ease of integration on the website, some units are skeptical about the staffing resources needed to respond in a timely fashion and the quality of the interactions recruiters will have with students once they do engage.

Source: EAB interviews and analysis.

To Inviting Prospects to Chat

Recruiters Cross-Trained to Engage by Phone, Email, and Live Chat

When implemented effectively, live chat offers a solution for interacting with otherwise anonymous visitors. Silent browsers are more likely to discuss concerns and raise questions when recruiters acknowledge their presence on the website and proactively invite them to ask for help. The University of Minnesota College of Continuing Education (CCE) has a unique approach to live chatting and offers a model for implementation.

Multichannel Learner Reps

- 6 FTEs; 2+ reps on chat at any given time
- Answer email and phone calls when not on chat
- Available during business hours; help button shown when unavailable

Vendor Partner

- Avg. seat license $20/month
- Cost varies according to seat licenses and add-on features

COLLEGE OF CONTINUING EDUCATION
UNIVERSITY OF MINNESOTA

≈4 Minutes per Conversation

- Short, transactional inquiries: When does registration start?
- Longer program-focused asks: Can you tell me about your IT programs?

30-40 Chats per Day

- Prospect-driven chat invites visitor to initiate conversation
- **Proactive chat triggered after 3-4 minutes of visitor inactivity**

75% of chats institution-initiated

Realizing that an overall decrease in inbound information requests resulted in additional capacity for their learner representatives—generalist recruiters trained to answer questions across the portfolio—the unit cross-trained these staff on live chat.

CCE's six multichannel representatives now work in pairs for two-hour shifts during business hours. During this time, prospects are able to initiate a live chat, but 75% of conversations are generated by invitations from a learner representative. These invitations are proactively sent to any visitor that has been inactive on the site for three to four minutes. By simply acknowledging the presence of website visitors and offering to answer questions, prospects are reminded of the valuable staff who are available to help them during their decision-making process.

While a visitor is not required to provide their contact information and, if they prefer, can remain anonymous, CCE has found that prospects are likely to provide these details if a live chat conversation develops beyond short, transactional requests.

For more information on implementing live chat see the *Live Chat Selection and Usage Guide* on pages 37-39

Source: EAB interviews and analysis.

Live Chat Selection and Usage Guide

As prospects increasingly rely on institutional websites to independently gather information and make enrollment decisions, live chat services have become an appealing option to engage with potential students due to its relative low cost and ease of integration on the website.

This guide provides an overview of effective practices for implementing live chat and includes common features, pricing structures, and staffing models. Use this guide in conjunction with the Live Chat Vendor Comparison Worksheet (available on eab.com) to help select the vendor that best fits your needs. This guide is meant to be used by institutions considering live chat acquisition as well as current live chat practitioners that are re-examining their processes.

A list of the vendors most commonly cited by Forum members is also available upon request.

Typical Live Chat Pricing Structure

The graphic below identifies the typical pricing structure employed by live chat vendors. While each vendor may offer different incentives or overall prices, most typically adhere to the formula identified below.

Feature Package

\+ **Additional Licenses**

$10-$20
per month, per user for standard feature sets

$25+
for each additional user license outside of feature package

Total Cost

$350 to $5,000 annually, varying by:

- Total user licenses
- Feature sets (ranging from $30 to $400 per month)
- Contract length (discounts around 10% for longer-term contract)

Live Chat Selection and Usage Guide (cont.)

Live Chat Feature Guide

The following table provides an overview of the core functions and features provided by most live chat vendors. These features are common across vendors, but it is important to confirm features before selecting a solution.

Feature	Definition
Proactive Chat	Chats initiated by visitor presence on the website, with invitation automatically extended to chatters based on several minutes of browsing
Chat Handoff	Ability to transfer chats from one chat representative to another without losing the conversation
Cross-Website Chat	Ability for a chat window to remain open even as a browser navigates multiple webpages
Effectiveness Ratings	Ability for chatters to rate the value and experience of their chat
Offline Response	Ability for visitors to submit questions via comment form or email when chat staff are not available, with question submission box appearing in place of chat initiation button on website
Social Log-Ins	Ability for chat participant's social media log-ins to integrate with chat, informing chat agents of whether chatter has had previous interaction
Chat Analytics	Data and reports pertaining to chat duration, frequency, location of chat participants, and activity for each staff member
Archived Transcripts	Saved records of chat conversations that can be accessed for later reference and context about a particular prospect
Mobile Support	Live chat available on mobile and tablet devices

Live Chat Staffing Options

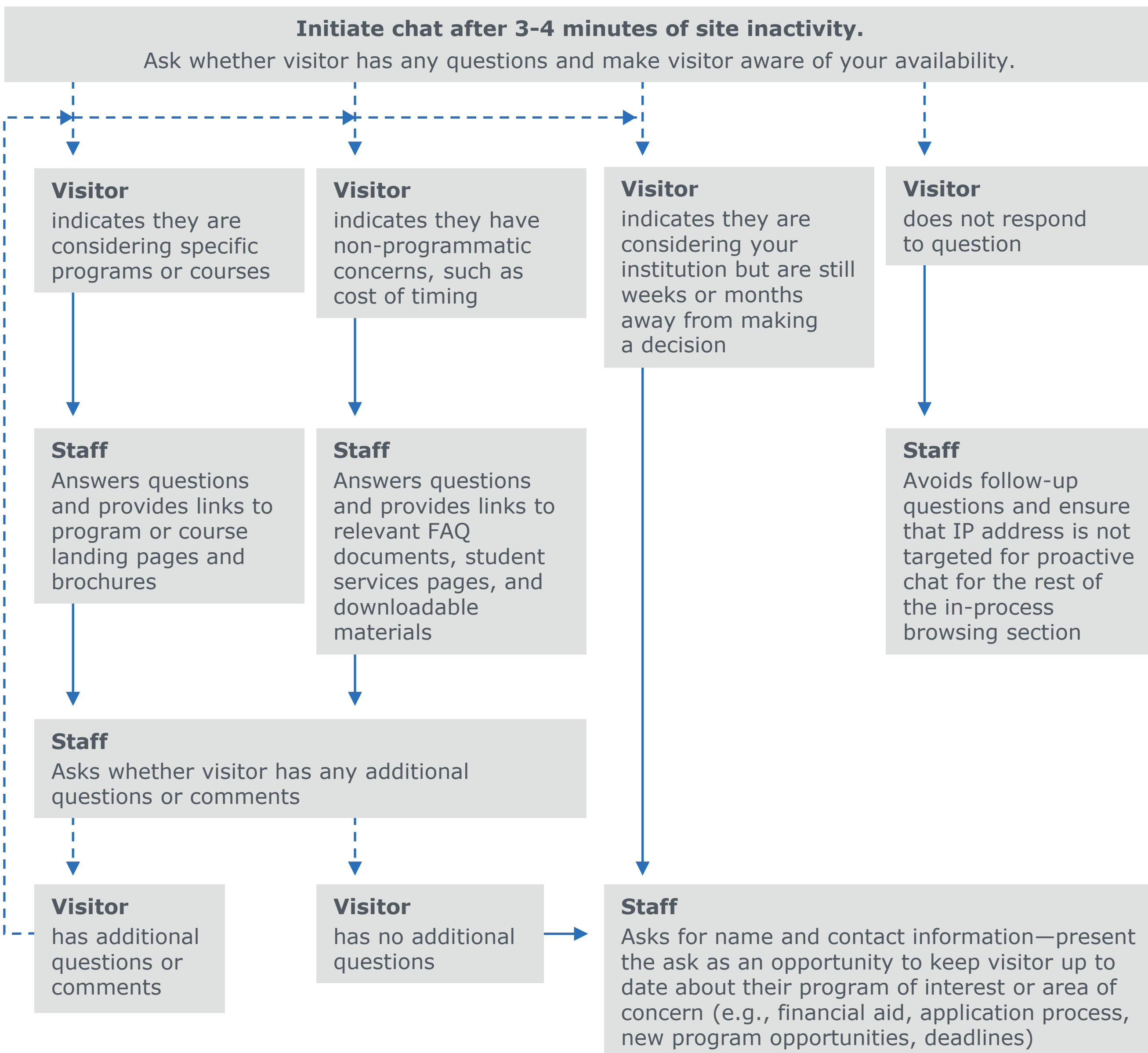
Many institutions are concerned that they do not have the resources to operationalize live chat and struggle to identify the most appropriate staffing model. The table below provides an overview of three staffing approaches employed by different institutions already using live chat. Advantages and disadvantages for each approach are identified.

Feature	Advantages	Disadvantages
Ideal Option: **Existing learner representatives or call center staff**	• Already familiar with the types of questions visitors will ask over chat • Know the institution well and understand the different resources and staff expertise available • Require least amount of training and onboarding time, ensuring quickest live chat implementation	• May not be appropriate to reduce total number of call center staff if call centers are still receiving high volume of inbound calls from prospects or are seeing increased volume
Alternative Option: **Student workers**	• Low-cost and readily available • Prospects may value a conversation with students and appreciate their unique insights into the academic experience	• Require most training • Lack professional expertise • Lack deeper familiarity with the institution's programming, support services, and additional resources
Alternative Option: **Retired workers or part-time employees**	• Prevents institution from having to reallocate existing staff while ensuring professional caliber work not offered by students • Already have some familiarity with institution	• May represent a more burdensome additional expense when compared to less expensive student worker options • May not be as familiar with the institution's programming, resources, and recent developments as assumed

Live Chat Selection and Usage Guide (cont.)

Live Chat Conversation Flowchart

During a chat interaction, unit staff should aim to both provide helpful information to the web visitor as well as establish the potential for continued interaction between the prospect and the institution. Follow the flowchart below to effectively connect chatters with useful programmatic and institutional resources and to encourage prospects to self-identify.



Restarting Stalled Applications

PART 2

- Practice 4: Pending Applicant Outreach
- Practice 5: Progressive Post-inquiry Follow-Up
- Practice 6: Mid-application Sample Class
- Practice 7: Pre-registration Faculty Phone-a-Thon

Key Insights

Restarting Stalled Applications

1. **Application Supplanting RFI as First Point of Contact:** As prospects circumvent the traditional inquiry process and proceed straight to application, the majority of institutions do not capitalize on prospects who start but do not complete the application process, leaving a significant pool of high-quality, warm leads largely ignored.
2. **Deploy Faculty and Instructors to Secure Enrollments from Committed Students:** Solicit faculty support in converting admitted—but unregistered—students who are still undecided about enrolling. Outreach from faculty is particularly influential in alleviating students' concerns about the academic rigor or outcomes of the program.

Breakthrough Practices

3. **Standardize Process to Convert Pending Applications:** Acknowledge all started applications with text, phone, or email outreach that provides clear next steps, reminds prospects of upcoming deadlines, and assigns a point of contact to assist with outstanding questions.
4. **Develop a Prospective Student's Profile through Progressive Email Follow-Up:** Embed calls to action in post-inquiry follow-up emails. Use intelligence gathered through responses to pre-qualify prospects for program fit, classify inquiries based on decision cycle, and schedule appointments with admissions counselors.
5. **Redeploy Sample Classes to Encourage Pending Applicants to Submit and Enroll:** Rather than broadly market sample classes to students who have already committed, target these high-impact events to mid-application prospects. Samples classes offer a more intense format than the typical information session, providing stalled applicants with exposure to program content and alleviating concerns about academic preparation or program fit.
6. **Invite Faculty to Call Admitted-but-Unregistered Students:** This outreach strengthens students' connection to the institution, alleviates lingering concerns, and reinforces program expectations to best position students for success.

Practice 4: Pending Applicant Outreach (page 43)

Practice 5: Progressive Post-inquiry Follow-Up (page 46)

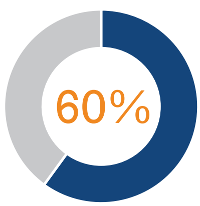
Practice 6: Mid-application Sample Class (page 52)

Practice 7: Pre-registration Faculty Phone-a-Thon (page 53)

Applications the New RFI

As prospects circumvent the traditional inquiry process and proceed straight to application, as many as 60% of those who start an application never submit it. The majority of institutions do not capitalize on these prospects, leaving a significant pool of high-quality leads largely ignored. Progressive institutions have started to classify pending applications as a form of inquiry and consider these students to be among the warmest leads they receive.

Majority of Applications Permanently Pending



Most started apps never submitted

- Application often the first interaction the prospect has with the institution
- Prospects likely starting online applications at multiple institutions

"We had so many prospects who were starting applications but weren't finishing. We realized that this was a valuable pool of high-quality warm leads that we were largely ignoring."

Director of Marketing, Large COE Unit

Step 1: Acknowledge Started Applications

Text
- Acknowledge started apps
- Remind of upcoming deadlines

Email
- Link to application components
- Invite to pre-enrollment events

Phone
- Answer complex questions
- Follow up on missing items

These applicants are often overlooked due to an assumption that a started application indicates intent to submit. In reality, many prospects are creating a username or submitting biographical information and never returning to complete the application. It is important to acknowledge all started applications with either text, phone, or email outreach that provides clear next steps, reminds prospects of upcoming deadlines, and assigns a point of contact to assist with outstanding questions

The most common form of outreach is via email, allowing for hyperlinks to incomplete documentation. When used judiciously, text messaging can also be a very effective mechanism for acknowledging an application and reminding prospects about upcoming deadlines. Lastly, phone outreach is particularly impactful with adult degree completer populations and can be used to understand prospects' roadblocks or hesitation.

For more information on implementation, see the *Stalled Applicant Outreach Template* on pages 44-45.

Source: UPCEA Marketing & Recruiting Annual Conference; EAB interviews and analysis.

Stalled Applicant Outreach Template

Email outreach is one of the most common and effective strategies for acknowledging that prospects have started, but not completed, an application. Through automated emails, institutions can follow up with clear next steps, remind prospects of upcoming deadlines, and assign a point of contact to assist with outstanding questions.

This is a template for email outreach directed at prospects who have begun—but not submitted—an application. Use the guide below to recognize the key components of successful outreach email and translate the template to your own institution and programs. Each component is highlighted in the sample email template.

Preparation Required for Implementation
Although processes and available technology will differ by institution, consider the following recommendations to support stalled applicant outreach:

- Involve IT staff to ensure that started and stalled applications are easy to monitor
- Require prospects to start application with name and email address to inform follow-up
- Ensure that applications can be saved and prospects can easily access them for return visits
- Prepare supporting collateral such as program brochures and application checklists that can help prospects complete their applications

Essential Components of Follow-Up Email

1. Immediate identification of institution, department, and program
2. Use of applicant's actual name
3. Immediate recognition of application begun by prospect and specific mention of program
4. Information about application and program start deadlines
5. Direct link to continue application
6. Inclusion of additional resources on both the program and the admissions process
7. Advice and word of caution around key challenges in application process
8. Advanced notice that prospect will receive follow-up should an application be submitted without essential documentation
9. Signature from actual admissions coordinator, complete with full name and contact information
10. Link to program website

1

EAB University
Music Education at EAB University

To: Prospective Student

Subject: Don't Wait to Finish Your EAB Application!

2 3 4

Dear Sara,

I see you have started an online application for the Doctor of Musical Arts in Music Education. Welcome! The application deadline to be considered to start in **Fall 2015** semester is **January 5, 2015**.

5 6 7

Access Your Application

Attached to this email is a program brochure with more information, as well as an admissions checklist so you can stay on top of your application materials. *The letters of recommendation and official transcripts often take the most time, so request those as soon as possible!*

8

After you submit your application, I will be in touch via email about what we have received and what we are missing. If you ever have a question about your application status, please contact me at jdiamond@eabuniversity.edu

9

Best Wishes,
Jed Diamond

Senior Admissions Coordinator
EAB University College of Fine Arts
jdiamond@eabuniversity.edu

202-568-7011

10

www.eab.edu/musiced

Stalled Applicant Outreach Template (cont.)

A similar template can be used to follow up with prospects who fail to complete a registration for an individual course or non-credit option. While the enrollment process for these courses may be simpler than for a degree program, they still merit follow-up that encourages prospects to complete the registration process.

Essential Components of Abandoned Course Registration Follow-Up Email

1. Subject line clearly referencing ease of registration process
2. Abandoned course mentioned specifically by name
3. Resources to address possible cause for concern resulting in abandoned registration
4. Quick link to the online registration system to complete the registration
5. Offer to answer questions from prospect

EAB University

From: Sarah Smith, Enrollment Advisor

To: Prospective Student

1 Subject: Complete your registration anytime!

Dear Katie,

2 I see that you have started to register for the online Project Management Fundamentals Course.

3 Worried about navigating technology to access your coursework? This short video shows you how easy it really is.

4 To get started, all you need to do is sign in to our online registration system and finish the final steps.

5 Questions? Contact me via phone or email. I look forward to hearing from you soon!

Best,
Sarah Smith

Enrollment Advisor
ssmith@eabuniversity.edu

202-568-7013

Automating Early Recruiting Conversations

Email Follow-Up Campaign Results in More, Better Information

Institutions have responded to the increase in stealth prospects by shortening their RFI forms to include only the most critical fields required for follow-up: name and email. While marketing directors worry that lengthy RFIs will deter prospects, short RFIs provide recruiters with little insight into a prospect's interests, timeline, or fit. Without this information, it is challenging to facilitate productive, early conversations and gauge intent to enroll. The best practitioner approach offers a compromise by staging the information gathering using embedding calls to action in post-inquiry follow-up.

Calls to Action Embedded in Email Prompts Prospect Self-Qualification

COLLEGE OF CONTINUING EDUCATION
UNIVERSITY OF MINNESOTA

Dear Sarah,

Thank you for your interest in the Master of Biological Sciences (MBS) program at the University of Minnesota.

Ready to get started? Attend an information session to learn more about the program.

RSVP

Can't attend a session? Tell us about your goals; then we can set up a time to meet.

Talk with an Advisor

Pre-advising Questionnaire

What is your professional background?

Prequalifies inquiries for fit and readiness

What was your undergraduate degree /GPA?

When do you plan to start?
○ 3 months ○ 6 months ○ 9 months ○ Unsure

Categorizes prospects based on decision time frame

When are you available to speak with an advisor?

Facilitates convenient scheduling

- Sent immediately after inquiry
- Tiered calls to action appeal to prospects with varied preferences

The University of Minnesota College of Continuing Education (CCE) designed a tiered call to action strategy that features a progressive, post-inquiry follow-up process that allows them to gather intelligence and pre-qualify prospects for program fit, classify inquiries based on decision cycle, and schedule appointments with admissions counselors.

Following inquiry, a prospect receives an email with two options. The first promotes a high-conversion events such as an online information session. The second option allows a prospect to schedule an appointment with an advisor. Prospects are required to complete a short questionnaire that provides more detailed information on their background and goals. The pre-advising questionnaire serves to pre-qualify inquiries for their program of interest and surface opportunities for recruiters to redirect unqualified prospects to better fit programs. Prospects will continue to receive these prompts in follow-up emails until they take action.

For more information on implementation, see the *Progressive Post-Inquiry Outreach Templates* on pages 48-51.

Source: EAB interviews and analysis.

Staged Approach Yields Higher Quality Data

One of the most impactful aspects of the University of Minnesota's approach to follow-up is that the message and content of the calls to action are tailored to program and student type. One of the primary distinctions is between Degree Completion and Professional Master's Programs. For degree completion students, prospects are prompted to upload a copy of their transcript, providing recruiters with the information they need to determine credit applicability.

Tailored to Program and Student Type

Professional Master's Programs

- Determine prospect qualification for program
- Surfaces opportunities to redirect unqualified prospects to better fit programs

Degree Completion Programs

- Determine transfer credit applicability
- Prompts prospects to upload transcript

Higher Quality Interactions with Serious Prospects

Improved efficiency in receiving student information

Better qualify prospect information

Increased number of pre-start advising appointments

Appointments more productive and individualized

The progressive approach to post-inquiry follow-up has resulted in higher quality interactions with serious prospects. Specifically, CCE has improved efficiency in receiving student information and, given high lead volumes, this has been an important time savings for staff. By pushing consistent messages with clear calls to action, they have also increased the number of pre-start advising appointments. Finally, once prospects complete the questionnaire, recruiters have insight into the prospect's background and goals, resulting in more productive and individualized appointments.

Source: EAB interviews and analysis.

Progressive Post-inquiry Outreach Templates

As institutions attempt to strike a balance on the number of fields required to complete an RFI, a tiered call to action strategy progressively collects additional information from prospects in email follow-up. Responses serve to pre-qualify inquiries for readiness and fit and help to categorize prospects by decision time frame. This format also facilitates convenient scheduling with a recruiter.

The following templates are examples of how to acquire additional prospect information after inquiry. Typically, these requests are aimed at prospects who have provided a name, email address, and identified a program of interest. Included below are templates relevant to both bachelor's degree completion programs as well as graduate programs, with variations between the two identified. Templates can be tailored to reflect program and student type. Note that prospects continue to receive the same calls to action outlined below until questionnaires or transcript submission are completed, even as email copy may change over the course of several messages.

*Use this template to engage with **graduate programs prospects** immediately following submission of an RFI form. For these prospects, email follow-up can be used to determine qualification for a program and surface opportunities to redirect unqualified candidates.*

Essential Components of Post-inquiry Email for Graduate Programs

1. Immediate identification of institution, department, and program
2. Use of applicant's actual name
3. Immediate recognition of the specific program about which prospect inquired
4. Reiteration of program's value proposition and benefits to enrollment
5. Invitation to attend information session
6. **Alternative option offered to discuss concerns and goals with an advisor, complete with link to pre-advising questionnaire (see questionnaire template on next page)**
7. Personal signature from program administrator
8. Additional opportunities to contact program staff with questions and access department resources

1 **EAB University**
Master's of Biological Sciences

To: Post-Inquiry Prospect

Subject: Take the next step!

2 Dear Holly,

3 Thank you for your interest in the Master's of Biological Sciences at EAB University.

4 The pursuit of graduate study and the type of degree obtained are critical decisions for students. The MBS degree is a very flexible program that allows you to choose courses that directly relate to your career goals. In addition, you have the option to pursue an intensive research experience with faculty working in your area of interest.

Choosing a program that gives you the specific knowledge and experience you need for your career path is one of the best ways to attract the attention of employers.

Ready to get started? Attend an information session to learn more about the program.

5 **RSVP**

Can't attend a session? Complete this questionnaire to tell us about your goals, and we can set up a time to meet:

6 **Talk with an Advisor**

We look forward to hearing from you.

7 Best Wishes,
Hank Schrader

8 Director of Master's of Biological Sciences
hschrader@eabuniversity.edu

202-568-7013

Progressive Post-inquiry Outreach Templates (cont.)

This questionnaire links directly from the email as a web form integrated into the CRM, rather than as a stand-alone PDF document. The connection to the CRM allows for recruitment staff to more easily log the information for a given prospect.

Essential Components of Pre-advising Questionnaire

1. Reminder of the program for which the prospect has expressed interest and clarification of the purpose of the form
2. Explanation of next steps once prospect completes form
3. Free-text response to gauge prospect's academic and professional experience; determines whether a prospect is qualified and admissible for a given program
4. Free-text response to gauge prospect's interests and reason for inquiring about the program; informs future conversation and communication between advisor and prospect
5. Schedule of availability for a meeting with an advisor; helps advisor prioritize time and outreach to broader group of prospects
6. Multiple options for staying in contact with the prospect

Pre-advising Questionnaire for Graduate Degree Candidates

EAB University

1 Thank you for your interest in the Master's of Biological Sciences Program. An advisor will be happy to meet with you to discuss the program. To get the most of out your discussion, please take a moment to tell us about your background and goals.

2 Once you've submitted this information, a program advisor will be in touch with you to follow up. You can also contact a learner representative at 202-568-7013 or at mbsquestions@eab.edu

3 **Please list your undergraduate degree, major, and institution, along with any relevant professional experience or post-baccalaureate education.**

4 **Please tell us what particular area(s) of the program interest you and how these studies might contribute to your professional goals.**

5 **When are you available to meet with an advisor?**

6 **Please provide your name, email address, and phone number below.**

Progressive Post-inquiry Outreach Templates (cont.)

Use this template to engage with prospects for bachelor's degree completion programs immediately following the submission of an RFI form. The goal of follow-up for these students is to prompt them to upload transcripts. Since one of the primary concerns for degree completion students is the transferability of existing credits, the questionnaire has been modified to focus on the transcript review process.

Essential Components of Post-inquiry Email for Degree Completion Programs

1. Immediate identification of institution, department, and program
2. Use of applicant's actual name
3. Link to program page
4. Reiteration of program's value proposition and benefits to enrollment
5. **Explanation of transcript review and the benefit of the review to a prospect;** transcript review can also assess credit for prior learning activities
6. **Prominent link to transcript review *(see transcript review form template on next page)***
7. Alternative option for progressing to enrollment offered via a conversation with a program-specific learner representative
8. Additional comments about important deadlines and link to relevant non-academic information

1 EAB University
BAS in Liberal Studies

To: Post-inquiry Prospect

Subject: Internships Open Doors—Where Might Yours Take You?

2 Dear Marie,

Former students tell us their internships—from the traditional foray at a new corporation to honing skills at a nonprofit to tackling a special assignment at your current employer—were critical to their careers.

3 James McGill, a recent graduate of the BAS in Liberal Studies program, recognized the link between his coursework and his career path almost instantly. "The tools I gained through the LS program prepared me for my internship and then, ultimately, my education and field experience prepared me for my career."

4 His internship allowed him to learn hands-on, while networking with local companies and building relationships within the industry. "I can honestly say it opened numerous doors for me and my career." Those connections paid off: McGill now works for a research firm in Washington D.C. "Every day comes with new challenges, but each challenge is a lesson, and I hope to never stop learning."

5 Ready for a new challenge? Take a first step today. We'd be happy to review your transcript and map how your existing course work would fit into the degree.

6 **Review Transcript**

7 Or, to learn more about the program, please feel free to contact me directly at 202-568-7011 or kmangan@eabuniversity.edu

Thank you again for your interest!
Katie Mangan

Program Learner Representative
College of Continuing Education, EAB University

8 *P.S. Preparing to apply to the program? Summer term 2015 application deadline is May 1, 2015. For details about financial aid, including deadlines, visit the College's financial aid page.*

Progressive Post-inquiry Outreach Templates (cont.)

This transcript review links directly from the email as a web form integrated into the CRM, rather than as a stand-alone PDF document. The connection to the CRM allows for recruitment staff to more easily log the information for a given prospect.

Essential Components of Transcript Review

1. Explanation of the purpose of the transcript review
2. Radio buttons allowing prospect to select one or more programs for which credits will be evaluated; allows leads to be directly connected to individual programs
3. Comprehensive collection of contact information
4. Transcript submission options for prospects from requesting institution as well as prospects from other institutions
5. Explanation of follow-up steps and contact information should prospect have questions

Transcript Review for Bachelor's Degree Completion Candidates

EAB University

1 This is an unofficial review that shows how your previously earned credits may be used towards a bachelor's degree. It can be a resource for planning your future course choices. After you submit your request form, a BAS adviser will follow up with your next steps. All information below is required.

2 **Request Planning Chart for Major in (check all that apply):**

○ Program A ○ Program B ○ Program C ○ Program D

3 **First Name** **Last Name**

Address

Phone **Email**

Transcripts

If you are NOT a current or former EAB University student, you will need to submit your transcripts along with this request. Please email a copy as an attachment, mail, or fax your transcript and enter in the following box the name of the institution at which your transcript originates

4

If you ARE a current or former EAB University student, provide the information below to grant permission to access your University records.

Electronic Signature

Student ID Number

Date Signed

5 **Important Final Step**

Once you've submitted the form, a program adviser will follow up with you within 7-10 business days or sooner. If you wish to contact us directly with any questions, please call 202-568-7013. Thank you, and we look forward to working with you!

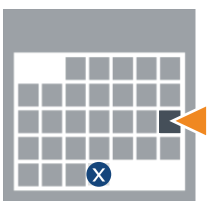
Securing Enrollments from Pending Applicants

Sample Class Exposes Undecided Prospects to Program Content

Recognizing that pending applicants represent a rich opportunity to impact conversions and concerned about enrollments in specific programs, the Georgetown University School of Continuing Studies (SCS) designed sample classes focused on converting pending applicants. SCS targeted these high-impact events to mid-application prospects. Sample classes offer a more intense format than the typical information session, providing stalled applicants with exposure to program content and alleviating concerns about academic preparation or program fit.

GEORGETOWN UNIVERSITY
School of Continuing Studies

Uncertain Enrollment Projection…



"There are fewer than two weeks until the registration deadline. What if we don't fill the class?"

- Faculty express concern about low enrollments prior to registration deadline
- Prospects from inquiry to recent admits invited to attend free F2F 1-hr "mock" class
- Majority of attendees (and subsequent enrollments) from prospects who were mid-application

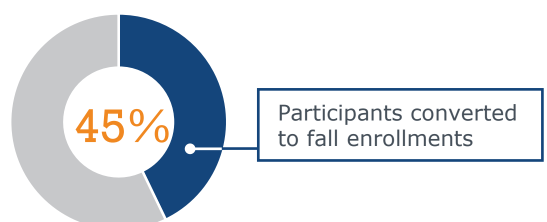
…Spurs New Offering for Prospects

Two "mock" classes offered prior to term start introduce prospects to content

1-hour class taught by program faculty member; regular hourly comp rate

Meet-and-greet with admissions staff and 2 to 3 current students

Immediate Impact on Enrollment



One of the distinguishing characteristics of the sample class is that it is predominantly focused on program content, simulating the program experience. For mid-applicant prospects, this format is particularly influential as prospects have moved beyond the early, basic information-gathering stage well served through an information session format. Mid-applicant prospects are concerned about academic program quality, faculty background, and the overall program experience, making the sample class the ideal format to offer at this high-impact moment.

As a result, SCS had an approximately 45% conversion rate from participants who immediately enrolled in the fall, the majority of whom had started, but not completed, applications.

Source: EAB interviews and analysis.

Preventing Stealth Applicant Melt

Personal Faculty Welcome Strengthens Connection to Institution

Stealth prospects who submit applications can still prove problematic for many institutions since it can be challenging to gauge their level of commitment to actually enroll. Whereas in the past, applicants typically developed a personal rapport with a recruiter prior to submission, today's student shoppers can apply and be admitted without ever interacting with a member of staff. For this reason, it is critical to maintain momentum and interact with admitted students to prevent melt prior to enrollment.

BOSTON UNIVERSITY

Faculty Phone Campaign:
"How can I help?"

- Program faculty call admitted students who haven't registered for classes 3-4 weeks prior to deadline
- Each faculty members calls ≈15 students for short, unscripted conversation; 50% contact rate
- Focus on answering questions and alleviating student anxiety about quality of online programs

Pilot Phase: Lagging Enrollment Rebound

- Lagging enrollment in Master's of Computer Science program
- Entrepreneurial faculty call admits to encourage registration

15%
Increase in enrollment

Rollout: College-Wide Implementation

- Dean-mandated adoption across unit
- Weekly accountability report sent to department chairs to ensure faculty involvement

100%
Participation among faculty

By inviting faculty to call admitted-but-unregistered students, institutions can strengthen students' connection to the institution, alleviate lingering concerns, and reinforce program expectations to best position students for success. Boston University's Metropolitan College recognized lagging enrollments in their Master's of Computer Science program and, as a result, faculty proposed a pre-registration phone-a-thon. Faculty received a list of unregistered students and called them to engage in an unscripted, short conversation.

The faculty efforts have paid off. For the pilot phase, outreach resulted in a 15% increase in enrollment for the Master's of Computer Science program. Capitalizing on the early momentum from the pilot program, the Dean now mandates that all programs participate and incentivizes adoption through a weekly accountability report that enumerates the number of admits, registrants, and calls made by program.

Source: EAB interviews and analysis.

Amplifying Silent Funnel Lessons

Existing Resources to Support Your Team Moving Forward

The previous pages discuss our latest strategies for engaging silent shoppers, prompting earlier sinquiry, and helping stalled applicants in making an enrollment decision. However, supporting today's student shoppers requires a multifaceted marketing strategy that often calls for a new approach to technology, staff, and processes. To assist members in implementation, three existing toolkits have been developed. Please contact your Dedicated Advisor or visit www.eab.com/coe to access an electronic version.

CRM Implementation

- Communication Plan Templates
- Recruiting Strategy Builder
- Lead-Scoring Guidelines and Templates
- CRM Implementation Road Map

Web Presence Optimization

- Content-Creation Handbook
- Inbound Marketing Techniques
- Guide to Maximizing Visitor Time on Site
- Calls-to-Action Primer

Mobile Site Optimization

- Mobile Design and Strategy Principles
- Content Prioritization Guide
- Mobile Analytics KPIs and Framework
- Vendor Selection Guidelines

EAB

Recommending “Smart” Next Steps

PART 3

- Practice 8: Next-Course Recommendations
- Practice 9: New-Launch Focus Groups
- Practice 10: Information Update Incentives
- Practice 11: New-Launch Target Market Profiles

Key Insights

Recommending "Smart" Next Steps

1. **Difficult to Propose Right Next Step at the Right Time:** As student career paths become more unpredictable and demand for short format credentials grows, institutions lack the capability to know when a student is most likely to need their next educational experience and what type of credential they will need.

2. **Challenge to Stay "Top of Mind" for Occasional Buyer:** Because students tend to pursue continuing and professional education infrequently and programs are not a recurring part of daily life, it is difficult for units to promote brand loyalty over time.

Breakthrough Practices

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

4. **Codesign Stackable Credentials with Current Students:** Invite program participants to participate in new-launch focus groups to inform course design and program planning; gain insight from current students on their goals and educational needs as they progress through their career.

5. **Incentivize Alumni to Update Profiles by Offering Personalized Professional Development Recommendations:** Design a portal that allows alumni to update their information and offers dynamic, personalized career and professional development recommendations that are aligned to their career goals and industry.

6. **Create Student Enrollment Profiles to Design Targeted Outreach:** Capture and code student interests using both pre-registration stated preferences and inferences from course history. Use these standard codes to identify potential participants for targeted announcements about new programs and courses.

Practice 8: Next-Course Recommendations (page 58)

Practice 9: New-Launch Focus Groups (page 59)

Practice 10: Information Update Incentives (page 60)

Practice 11: New-Launch Target Market Profiles (page 61)

A Lifelong Learning Relationship

Today's Portfolio Career Builder Poses Challenge and Opportunity

More so than ever before, students are forgoing the "typical path" to return to school at a certain age and are demanding shorter-format, "just in time" credentials to serve them at different turning points in their careers. Despite the fact that many COE units are in a position to serve students as lifelong learning partners, institutions often struggle to capitalize on these opportunities. Developing a long-term relationships with today's "search and shop" students requires a strategy for encouraging repeat purchases and ensuring alumni return for their next educational need.

No Such Thing as a Typical Path

More opportunities for repeat enrollments, but…

Difficult to Propose Right Next-Step at Right Time

Schools lack data and student career paths lack predictability

Challenge to Stay "Top of Mind" for Occasional Buyer

Loyalty easiest when a recurring part of daily life, switching costs high

The primary challenge in proposing next steps is one of timing; most institutions lack the data or analytical capabilities to inform outreach, and student career paths lack predictability.

The practices in this section support COE units in staying top-of-mind for occasional buyers and securing repeat enrollments from individual course takers, certificate seekers, and degree program alumni.

Source: EAB interviews and analysis.

Even if You Don't Have Amazon's Resources

"People Like You" Course Recommendation Screen Profiles Suite of Options

Individual course takers are often looking to make a quick enrollment decision and cannot be nurtured over time, making it difficult to recruit first-time buyers. Once a student has decided to enroll for one course, however, it is much easier to recruit them for additional courses. Fresno Pacific University, an institution with a portfolio that primarily caters to educators searching for individual professional development courses, recognized that by simply suggesting other classes a student may be interested in, it is much easier to recruit them for a second or third program.

Course Recommendation Screen Profiles Suite of Options

Recommendations Address Individual Course Decision Challenge

The Challenge: Short Decision Cycle for Stand Alone Online Courses

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

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

- Courses already organized into topic clusters
- Top three courses in related cluster displayed on each course webpage
- System doesn't include any courses already taken by logged-in students

To execute on this vision, Fresno Pacific University organized their course catalog into topic clusters and aim to bring current and former students back for subsequent courses by featuring three "students like you" course recommendations on each specific course's webpage; this list reflects the most commonly taken courses within the same cluster.

Source: EAB interviews and analysis.

Co-Designing the Next Step

Student Input Informs Next Course Syllabus and Stackable Certificate

As COE units consider new offerings to better serve students across their careers, they often struggle with defining program structure and content. By consulting currently enrolled students, institutions can gather intelligence on their future educational needs and codesign the next courses to add to the portfolio. Prior to expanding their portfolio to include stackable certificates, Louisiana State University's Continuing Education unit designed focus groups that consisted of current students, receiving unparalleled insight to inform course design and program planning.

Current Student Focus Groups

Q: What additional training or development will you need as you progress in your career?

Q: How could this course be improved to better meet your professional goals?

Q: Does this program need to be modified to more directly align with your industry?

Success in Bolstering Enrollments for Flagship and New Course

Frontline Supervisor Skills

- Flagship course
- Focus group feedback used to modify content and format

Managerial Effectiveness

- New course designed for stackable certificate
- Addresses new challenges in career progression

Management Certificate Program

LSU Continuing Education

280% Increase in enrollments FY12-FY13

Through focus groups with students enrolled in one of their flagship courses—Frontline Supervisor Skills—LSU gathered input prior to designing the next step courses that would eventually stack into the Management Certificate Program. During these focus groups, students provided their feedback on the proposed syllabi and learning objectives. In addition to gaining input on the content, LSU also found that focus group participants served as a "ready-made cohort" for the new course. By engaging these students in co-creating the curriculum, many decided to enroll in the new course when it was offered.

Source: EAB interviews and analysis.

Incenting Alumni to Stay in Touch

Personal Career Development Based on Contact Updates

One of the barriers COE institutions have in developing a lifelong partnership with students is limited insight into their career progression, goals, and interests after they complete a program. Once a student graduates and reenters the workforce, it can be challenging for the institution to stay top-of-mind without actionable information to propose the right next step. The Pima Medical Institute (PMI), a for-profit college that focuses on graduate education for health professions, redesigned their alumni portal to collect actionable data from students that informs personalized, professional development recommendations.

Alumni Profile Updates Linked to Personalized Professional Development

Alumni Community

PIMA MEDICAL INSTITUTE

Welcome Sarah!

Please update your profile

Help us know what you need…

- New course and professional development recommendations
- Notifications of programming aligned with your career goals and industry
- Job postings to secure your next role

- Incentivizes alumni to regularly update their profiles
- Enables standardized queries based on program requirements
- Responses inform professional development course recommendations

Professional Development Recommendation Emails

- Database queried to identify potential program participants
- Sent every 3-4 months
- Include recommended courses based on alumni profile
- Feature alumni testimonials and success stories

Facilitating Re-Enrollment

1.4 Number of additional courses alumni take after community launch

60% Percentage of alumni who complete their profile within three months of graduating

Recognizing that even if data about alumni is available, it is often static and outdated, PMI incentivizes students to regularly update their profile by offering personalized professional development recommendations for new programs aligned with their career goals and industry. To accomplish this, responses to alumni profile questions are coded, enabling PMI to capture standardized information from all respondents and run queries to identify potential program participants. If an alumnus updates their profile and has received a promotion, for example, they will receive a targeted email with recommendations that are best suited for their needs in a new role.

By providing alumni with personalized recommendations that are aligned with their goals, interests, and career path, PMI has impacted reenrollments—alumni are now taking an average of 1.4 additional courses since the launch of the community.

Source: EAB interviews and analysis.

A Personal Invitation to Our Newest Course

Student Enrollment Profiles Inform New Program Launch

For occasional buyers, very little data exists about a student's preferences or interests to recommend additional courses or programs. Without this insight, it is impossible to propose the right next step. Southern Methodist University Continuing and Professional Education (CAPE) took advantage of a very common feature in their student information system (SIS), allowing them to capture and code student interests using both pre-registration stated preferences and inferences from course history. These codes are used to identify potential participants for targeted outreach on new course offerings.

SMU | Continuing and Professional Education

Coding and Capturing Interests

Student Self-Reported Interests → Student Interest Codes ← Course Enrollment History

Student Interest Codes → **Personalized Student Profiles**

50% Percentage of course registrants reporting interests

Targeted Outreach for New Course Offering

- New paralegal course launched
- Student profiles queried to identify potential participants based on interest codes
- Interest-coded email sent to market program

79% Percentage of enrollees who received interest-coded email

During registration, students are asked to designate their interests, including modality preferences and subject matter areas. Additionally, CAPE uses a student's past enrollment history to infer interest in the subject matter. For each stated and inferred preference, CAPE attaches an interest code to the student profile in the SIS, resulting in a personalized profile of every student's interests. Even if a student took only one course in the past, CAPE has detailed information about their other interests based on self-reporting to inform outreach.

When a new program or course is launched, marketing is able to run a simple query of the SIS to identify past students with interest codes that align to the subject matter. When a new paralegal program was developed, for example, a targeted email was sent to all students with a paralegal interest code on their account. With a ready-made group for their marketing message, 79% of the enrollees were recipients of this email.

Source: EAB interviews and analysis.

EAB

Marketing Automation Toolkit

The COE Forum developed this suite of tools and resources to help members who are considering the implementation of a software solution to support their marketing efforts, with a specific focus on the latest entrant: marketing automation software. As the higher education software landscape becomes increasingly populated by vendors pitching a variety of technologies, it can be challenging to differentiate between potential offerings. The purpose of this toolkit is to help members understand the capabilities of the most prominent software options, assess which solution is best suited to meet their needs, and prepare institutions to accelerate the implementation of marketing automation software.

Marketing Software Primer

Email Marketing, Marketing Automation, and Customer Relationship Management

The higher education marketing software landscape is populated by dozens of vendors pitching solutions that claim to generate leads and enrollments, automate tedious workflows, and improve return on sales and marketing investment. **Email marketing**, **marketing automation**, and **customer relationship management (CRM)** systems represent three prominent types of software solutions frequently adopted by COE units. While each option offers features that can be beneficial in optimizing marketing and recruiting practices, it can be challenging to distinguish among features and understand the primary business objective that each product is best suited to support.

As a result, many institutions acquire vendor solutions without a clear understanding of the main feature set and how those feature sets solve unit challenges.

This software primer explains the distinctions among CRM, marketing automation, and email marketing systems. An overview table describes the business objectives, portion of funnel, key users, communication style, and sample list of vendors for each type of software, while a separate table covers the high-level functions of each of the three categories. Recognize where feature sets overlap and where each category offers a unique value proposition, and consider which solution may be most appropriate given your unit's challenges.

Marketing Software Solutions, Defined

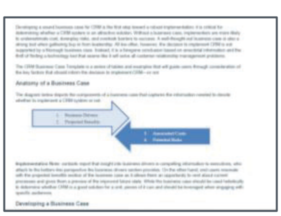
1. **Email Marketing:** Automates email communications by structuring and scheduling mass communication email blasts to groups of prospects. Provides analytics about prospects' interactions with each message. Common vendors include ConstantContact, MailChimp, and Mailgen.

2. **Marketing Automation:** Tracks prospect behavioral data—when they visit the website, open an email, or click on a link—and uses this information to gauge a prospect's level of interest and deliver personalized content and messaging. The software scales marketing interactions with prospects, automates communication, captures prospect information from multiple digital sources, and supports and analyses comprehensive marketing campaigns. Marketing automation is particularly useful for providing high-level, macro insights about marketing channel and lead source effectiveness to inform changes to broader marketing strategy. Common vendors include Eloqua, Hubspot, Marketo, and Pardot.

3. **CRM (Customer Relationship Management):** Helps institutions efficiently store and organize information, including past interactions and contact details, for specific prospects, current students, and alumni. Particularly useful for providing context around an institution's record of interaction with individuals that can inform follow-up, one-on-one communication by unit staff. Common vendors include Ellucian, Hobsons, Jenzabar, Salesforce, and Talisma.

EAB tools to aid COE Units with CRM Identification, Adoption, and Implementation

Available on EAB.com



CRM Business Case Template

Guide to Understanding Your CRM Needs

Higher Education CRM Vendor Primer

	Email Marketing	Marketing Automation	CRM
Business Objective	• **Scale interactions with prospects without adding staff** • Reach widespread audience with less investment than other full-scale technology solutions	• **Generate more qualified leads** • Optimize marketing campaign copy and segmentation • Increase likelihood of prospect response to a call to action • Measure return on specific marketing activities and campaigns • Improve marketing workflow	• **Increase enrollments** • Track interactions with the institution across the student lifecycle (prospect-student-alumnus) • Standardize collection of student contact information
Portion of Funnel	Top: From lead generation and identification to application Bottom: Interaction with accepted and enrolled students	Top: From lead generation and identification to application	Bottom: Interaction with late-stage prospects, accepted prospects, and enrolled students
Key Users	Marketing staff	Marketing staff	Recruiting staff
Communication Style	Group: Marketing campaign to broad audience or segment	Group: Marketing campaign to broad audience or segment	Individual: Recruiting staff to prospective or current student
List of Most Commonly Referenced Vendors	• Benchmark Email • Campaigner • Constant Contact • GetResponse • GraphicMail • iContact • Mail Chimp • Mailgen • Mad Mimi • Pinpointe • Vertical Response	• Act-On • DemandMarketer • Eloqua • Hubspot • Marketo • Pardot • Salesfusion • Silverpop • Sparkroom	• Blackbaud • CampusCE • Ellucian • EnrollmentRX • Hobsons • Intelliworks • Jenzabar • N2N • RightNow • Salesforce • SugarCRM • Talisma • TargetX

Primary Features Table

The table below clarifies the distinctions and areas of overlap among the three identified software types. General features have been assigned to each of the three software types in this table for the purpose of comparison, but it is important to note that specific features will vary by vendor.

For more information on the specific capabilities, please refer to Tool 2, Marketing Automation Capabilities Compendium, in this toolkit and the CRM toolkit, available on eab.com

Primary Features: This table identifies the core features found in each of the three profiled software solutions.

	Email Marketing	Marketing Automation	CRM
Email-Centric Marketing Campaigns Allows design of staged marketing campaigns via email to large prospect groups	✓	✓	
Email Automation Allows emails to be scripted and templatized for automatic distribution	✓	✓	✓
Email Analytics Provides data and reports on email response rates, open rates, and click-through rates	✓	✓	
Lead Segmentation Separates large groups of prospects according to likelihood of conversion based on selected criteria		✓	
Lead Scoring Assigns a point value to prospects indicating relative warmth, based upon actions taken and behavior correlated to conversion		✓	✓
Relationship Management Provides a comprehensive record of communications between all institutional staff and a prospect			✓
Task and Event Management Supports the ability to connect specific prospects with a recruitment event such as a webinar or information session			✓
Sales Process Reporting Provides revenue data affiliated with individual prospects			✓
Campaign ROI Provides an assessment of marketing spend to determine the extent to which investments yield conversions		✓	
Social Posting Allows marketing material to be proliferated across social media channels and for prospects to be captured via social media		✓	
Landing Page Management Supports the creation of unique webpages linked to specific programs that include program content, collateral, and RFI forms		✓	

Marketing Automation Capabilities Compendium

COE marketing directors share that clarifying Marketing Automation capabilities can be challenging. Information from vendor websites varies, making it challenging to compare features across systems. Given the lack of standardization, units struggle to assess whether a vendor's claims are unique, key differentiators or common among available options. Many vendors use the same broad terminology to describe functionality and, without a deeper understanding of available options, it can be nearly impossible to determine if a software package will address an institution's goals.

This capabilities compendium organizes the essential categories of marketing automation functions and lists the key features within each category.

Each feature profile includes a definition of what it accomplishes for a user or within the system, an example of how a COE unit might benefit by using the feature, and an assessment of how common that particular feature is across marketing automation systems available to higher education institutions.

Use this guide to determine what features are of greatest import to your institution, whether those features should be used as distinguishing factors when selecting a vendor, and whether a vendor can support particular features especially relevant to your institutional goals.

Feature Categories

Lead Management: The organization, tracking, filtering, and segmenting of prospects by different categories and characteristics.

Content Creation and Management: The ability for a marketing automation system to support the development of new marketing material and promote that material publicly.

Analytics and Reporting: The ability for a marketing automation system to provide data and results around marketing efforts that help to inform marketing spend and resource use.

Email Marketing: The ability of a marketing automation system to manage and deploy comprehensive, email-based marketing initiatives.

Integration and Cross-Functionality: The ability for a given marketing automation system to integrate with other existing software and replicate functions found in other software systems.

Design, Ease of Use, and Support: The extent to which a marketing automation system and included features are easy to navigate, understand, and customize.

Planning: The ability for a marketing automation system to provide tools that help a marketing department set deadlines and budget resources.

Frequency Categories

Standard: This feature is a defining element of marketing automation systems. Every marketing automation system should have this basic functionality.

Variable: Functionality, depth, and ease of use may vary among vendors, though most will provide at least basic functionality.

Differentiator: These features help to differentiate vendor products and marketing automation systems from one another. They are not widely available.

Lead Management

These features address the ways that marketing automation systems track, monitor, and sort individual prospects. Each feature helps to clarify the prospect's warmth (e.g. likelihood of enrollment) or otherwise conveys to marketing staff the actions and activities undertaken by prospects.

Feature	Definition	Use Case	Frequency
Lead Database	Consolidates all known prospects into a central location that provides easy access to additional information about any given prospect	Increases richness of prospect profile by pulling all known behaviors; helps to organize prospects in a central location accessible to all staff	Standard
Lead Scoring	Collects various prospect behaviors and assigns them a point value, culminating in an overall score that determines the prospect's warmth; behaviors include email interaction, website visits, webinar views, social media shares, submitted forms, and landing page interaction	Helps institutions segment leads by sorting based on scores, giving a sense of what prospects are ready for more aggressive contact and what prospects still need softer nurturing	Standard
Visitor Source Information	Identifies where each visitor to the main institutional website comes from (e.g., affiliate site, banner ad, email click-through)	Enables more effective ad targeting by showing institutions the sources that most frequently bring visitors to the website	Standard
Lead Segmentation	Divides prospects into micro-segmented groups that can then be distinctly targeted through marketing campaigns	Divides prospects into program-specific groups, ensuring that prospects receive marketing communication that's most relevant to their potential interests	Variable
Hot Prospect Alerts	Notifies staff when a prospect has been especially active or increased warmth status to a point that may merit further contact from the institution	Helps institution prioritize outreach to individual prospects and capitalize on a prospect's search momentum	Variable
Social Media Profiles	Incorporates a prospect's social media behavior into their overall lead profile, informing segmentation and lead scoring	Gives a more complete picture of a prospect's interest and draws out information about a prospect that otherwise might go unseen	Differentiator

Content Creation and Management

These features address how systems enable marketing and recruiting staff to promote content via different advertising channels and formats.

Feature	Definition	Use Case	Frequency
Landing Page Creation	Allows easy creation of special program-centric pages accessible only via targeted emails or banner ads	Reinforces the effectiveness of targeted banner ads and targeted emails by directing prospects to a related and equally narrowly targeted page after they click through	Standard
Banner Ad Creation	Allows easy creation of targeted banner advertisements that map to broader online ad campaigns, targeting the appropriate prospects based on web behavior	Helps send a consistent message to prospects and ensures that prospects who visit the institution's website will continue to see material promoting the institution as they browse other websites	Standard
Webinar Support	Allows easy facilitation and hosting of webinars, tracking prospect attendance and feeding the information into prospect profiles	Allows institutions to use webinars as a proxy for prospect engagement and determine what content and timing is most effective for different types of prospects	Variable
Social Media Marketing	Enables pre-scheduled campaigns to run through social media outlets, reaching followers across social media networks	Expands selection of available prospects by capitalizing on channels beyond the website and email	Differentiator

Analytics and Reporting

These features provide insight into what marketing efforts and campaigns are providing return on investment and what content is proving most effective at moving prospects closer to enrollment.

Feature	Definition	Use Case	Frequency
Website Visitor Tracking	Shows which prospects are visiting the website, how they spend time on the site, how often they return, and what their browsing patterns are	Helps prioritize which webpages prospects should be directed to or which pages should be promoted more prominently; informs a prospect's profile before they officially identify	Standard
Dashboards and Reports	Allows users to view lead activity, channel activity, information by time period and date range, email results, web results, and more	Provides comprehensive insight into the effectiveness and operations of marketing efforts at large	Standard
Campaign ROI	Provides a report of the cost and value of marketing campaigns, assessing the leads and conversions generated by a campaign relative to the investment	Gives insight into whether specific marketing campaigns are worth continued investment and where resources can be re-allocated	Variable
A/B Message Testing	Enables multiple sets of emails to be sent to groups of prospects to determine what content, timing, subject lines, and calls to action prove most effective at encouraging prospect engagement	Helps institutions deduce the most effective message content and tone for different demographics and programs, leading to improved click and open rates	Differentiator
A/B Landing Page Testing	Enables multiple sets of landing pages to be pushed out to a large group of prospects	Helps determine what content, calls-to-action, designs, and formatting lead to greatest conversion	Differentiator
Asset Usage	Demonstrates how frequently marketing materials are used and by which campaigns	Informs future marketing spend	Differentiator
Marketing Attribution and Revenue Reporting	Breaks down each part of a marketing campaign to assess what components are most effective at driving engagement from prospects	Helps redirect marketing spend to more effective channels and content	Differentiator
Organic Search Monitoring	Allows competitor rankings to be tracked with an organic search keywords report	Provides ideas for page optimization and keyword use to improve an institution's search ranking	Differentiator
Paid Search Monitoring	Allows insight into prices paid for keywords and the relative popularity of various search terms	Provides ideas for keyword purchase by identifying competitive advantages and disadvantages	Differentiator

Analytics and Reporting (cont.)

Feature	Definition	Use Case	Frequency
Predictive Modeling	Uses lead scores and other internal data to predict lead behavior	Helps anticipate prospect behaviors, allowing for marketers to proactively plan next steps in outreach	Differentiator
SEO Page Audits	Determines how your webpages perform with regard to including highly ranked search terms	Provides ideas for rewriting web content and aligning your message across platforms	Differentiator
SEO Analytics	Assesses how highly ranked your institution is for the most relevant keywords across prominent search engines	Provides insight into competitor marketing efforts and what keywords may be worth pursuing	Differentiator
Social Media Analytics	Gathers insights into how content is shared across social media and how known prospects engage with social media content	Helps identify the most relevant social media networks on which to establish a presence, depending on the demographics of potential prospects	Differentiator

Email Marketing

These features address how marketing automation systems automate email communication and reach prospects via outbound marketing channels.

Feature	Definition	Use Case	Frequency
Email Drip Marketing	Also known as batch email marketing, this allows email campaigns to be planned out with if/then sequences, sending customized emails to groups of prospects based on their open and click interactions with each email	Allows for prospect behavior to consistently inform and shape the contact they receive from the institution, progressively segmenting prospects into distinct groups receiving the most relevant content and calls to action for each	Standard
Triggered Emails	Sends immediate, real-time emails to prospects who engage in certain activities or actions, such as clicking on a specific link	Enables instant communication to capitalize on a prospect's moment of interest and demonstrates that the institution is aware of a prospect's interest	Variable
Mobile-Optimized Emails	Ensures that email content and calls to action translate to a mobile format, rendering them easy to read and click through	Optimizes content for an environment in which prospects are increasingly more likely to browse	Differentiator
Multiple Email Addresses per Record	Allows for one prospect to have multiple associated email addresses	Ensures that prospects will receive communications, which may be relevant for prospects for whom an institution cannot be sure contact information is current	Differentiator
Multiple Records per Email Address	Multiple profiles can be associated with the same email address	May be useful for reaching families or prospects who may share an account	Differentiator

Integration and Cross-Functionality

These features identify the extent to which marketing automation integrates with existing software platforms on campus or performs the same functions as other software packages.

Feature	Definition	Use Case	Frequency
CRM Integration	Automatically syncs with existing CRM systems to link a prospect's CRM record to their marketing and recruiting activities being tracked by the marketing automation system	Helps marketing, recruitment, and enrollment management staff seamlessly manage a prospect, improving handoffs between each division, increasing transparency into the prospect's status, and reducing effort around information sharing	Variable
Real-time Alerts	Activity by an individual prospect, such as opening an email or visiting the website, triggers an alert to a marketing representative using the CRM	Helps staff stay aware of individual prospects and provides context for a prospect's rising warmth	Variable
App and Plug-In Functionality	Allows integration with other third-party applications beyond CRM systems	Capitalizes on prospect and funnel data housed elsewhere and reduces the need for acquisition of existing functionality within the marketing automation system	Variable
Built-In CRM Functionality	Includes features commonly found in CRM, such as account management, call and email logging, and individual case records	Eliminates need for acquisition of separate CRM system	Differentiator
Mobile CRM	Allows access to prospect records via mobile device	Increases flexibility, convenience, and access to record of prospect interactions	Differentiator

Design, Ease of Use, and Support

These features address how easily marketing automation systems can be customized by users and the level of external support provided to users with questions about system functions.

Feature	Definition	Use Case	Frequency
WYSIWYG Builders	Short for "What You See Is What You Get," allows users to create straightforward content without HTML or otherwise advanced coding skills	Ensures that minimal technical skill and training is required to develop content within the system and that content developed will function and appear as expected and intended	Standard
User Community	Provides message boards and forums for system users to discuss their experience with the system	Leverages the network of other institutions using the software and allows users to benefit from the experiences and insights of experienced users	Standard
Customer Support	Provides implementation support and access to vendor staff for questions about the system (may require additional fees), as well as training for system users on campus	Helps users extract value out of complicated feature sets and software functionality that otherwise would go unused	Standard
Custom Fields	Allows staff to modify and edit tables and reports within the system, beyond the standard template	Helps institutions track unique prospect activities or design different types of lead-tracking metrics for different programs	Variable
Customized Dashboards	Allows creation of customized reports and the combination of existing reports that can be viewed together	Improves ease of identifying marketing channel effectiveness and ROI	Variable

Planning

These features help marketing departments organize and plan long-term departmental initiatives.

Frequency	Definition	Use Case	Frequency
Budgeting	Plans out marketing spend and investments	Gives increased transparency and insight into available marketing resources	Differentiator
Calendaring	Manages a calendar for all marketing functions, including content creation and campaign timing	Gives all staff with access insight into important deadlines without having to manually communicate	Differentiator

Guide to Marketing Automation Vendors

This tool details the pricing structures of vendors, as well as profiles of the most frequently referenced marketing automation vendors from the Forum's research conversations. Each profile contains a basic overview of the vendor, pricing comparisons and pricing tiers and structures, CRM systems that integrate with the marketing automation platform, and a list of higher education institutions currently partnering with the profiled vendor.

Use the table of considerations in the Marketing Automation Vendor Comparison Worksheet (available on eab.com) to vet and evaluate vendors.

Prior to selecting a vendor, institutions should seek a demonstration of each tool for the benefit of all potential users and reference Tool 2: Marketing Automation Capabilities Compendium to ensure that priority areas are sufficiently addressed by a chosen vendor.

Typical Marketing Automation Pricing Structure

The graphic below identifies the typical pricing structure employed by live chat vendors. While each vendor may offer different incentives or overall prices, most typically adhere to the formula identified below.

Implementation Fee — Up-front, one-time cost, which may include training

Maintenance Fee

\+ **License Fee** — Recurring costs (either monthly or annual)

Total Cost

Varies widely depending on:

- Number of contacts in contact database
- Number of users with access to the system
- Feature sets acquired
- Complexity of data integration with other systems on campus
- Level of customer service (some vendors offer various levels of service, including onsite consulting)

Total cost for COE units should be between $10,000 and $50,000 annually, although options may range from less than $5,000 to over $100,000

Marketing Automation Vendor Comparison:

act-on

Profile:	Prominent marketing automation system
Price:	From $600/month for 1,000 active contacts to $8,750/month for 1 million active contacts
CRM Integration:	Salesforce, SugarCRM, Microsoft Dynamics, Infor, NetSuite
Selected Customers:	University of Southern California, Westmont College, The Ohio State University, University of Miami, Northern Illinois University
Website:	www.act-on.com

DemandMarketer

Profile:	Enrollment marketing automation intended for higher ed
Price:	Pricing not publicly available
CRM Integration:	CRM integration not publicly available
Selected Customers:	Assumption College, Duquesne University, Georgia Tech, Regent University, Syracuse University, University of Alabama in Huntsville, UNC-Charlotte, University of the Sciences, University of Vermont
Website:	http://www.demandengine.com/email-marketing/software-for-higher-education.php

eloqua

Profile:	Prominent marketing automation system now owned by Oracle
Price:	Monthly cost for database of <10,000 contacts: $2,000 for Basic suite with 10 users; $4,000 for Standard Suite with 50 users and increased functionality; Enterprise suite with unlimited users and greatest functionality at negotiable price
CRM Integration:	Native integration with Salesforce, Oracle, and Microsoft Dynamics CRM; also integrates with NetSuite
Selected Customers:	Regis University, DeVry University, Northern Illinois University
Website:	www.eloqua.com

HubSpot

Profile:	Prominent and fast-growing marketing automation system
Price:	Basic: $200/month for 100 contacts, with $100 per 1,000 extra contacts; includes 3 users; $500 one-time training fee Pro: $800/month for 1,000 contacts, with $50 per 1,000 extra contacts; unlimited users and expanded functionality, including lead scoring; $2,000 one time training fee Enterprise: $2,400/month for 10,000 contacts, with $10 per 1,000 extra contacts; unlimited users and greatest functionality, including A/B testing; $2,000 one-time training fee
CRM Integration:	Salesforce, SugarCRM, Zoho, NetSuite, Pipedrive, Base CRM
Selected Customers:	Florida Institute of Technology, Thunderbird School of Management
Website:	www.hubspot.com

Marketo

Profile:	Prominent marketing automation system, originally rooted in email marketing capabilities with other functionality subsequently added
Price:	Three preset packages supporting up to 10,000 records per month; Spark package for with fewest tools priced at $895/month; Standard package priced at $1,795/month adds A/B testing and more robust reporting; Select package at $3,195/month adds more advanced analytics
CRM Integration:	Native integrations for Salesforce.com, Microsoft Dynamics CRM Online and SAP Cloud for Sales; certified integrations are available for Microsoft Dynamics CRM On Premise, Netsuite, Oracle and SugarCRM.
Selected Customers:	Northeastern University, Algonquin College, George Washington University School of Business, UC-Irvine Extension, University of Redlands, Harvard Business School
Website:	www.marketo.com

salesforce pardot

Profile:	Prominent marketing automation system directly tied to Salesforce
Price:	Basic: $200/month for 100 contacts, with $100 per 1,000 extra contacts; includes 3 users; $500 one-time training fee Pro: $800/month for 1,000 contacts, with $50 per 1,000 extra contacts; unlimited users and expanded functionality, including lead scoring; $2,000 one time training fee Enterprise: $2,400/month for 10,000 contacts, with $10 per 1,000 extra contacts; unlimited users and greatest functionality, including A/B testing; $2,000 one-time training fee Also offers non-profit discount that other vendors may not have available
CRM Integration:	Salesforce, SugarCRM, NetSuite, Microsoft Dynamics, RelateIQ
Selected Customers:	University of New England
Website:	www.pardot.com

salesfusion

Profile:	Relatively prominent marketing automation system
Price:	Core package starts at $950/month for 10,000 contacts, with a performance package addition starting at an additional $350/month; additions of 10,000 contacts costs an extra $100/month up to 50,000 contacts, with incremental discounts applied to continuing addition of contacts Additional add-on packages include dedicated IP for $250/month, CRM integration for $50/month, and Sandbox for $100/month
CRM Integration:	Microsoft Dynamics, Salesforce, Sage CRM, Infor CRM, Sugar CRM, CRM API
Selected Customers:	Website does not specify
Website:	www.salesfusion.com

SILVERPOP

Profile:	Relatively prominent marketing automation system; more focused on B2B (http://www.marketingautomationsoftware.com/reviews/silverpop/)
Price:	Pricing not publicly available
CRM Integration:	Salesforce, Microsoft Dynamics CRM, Adobe and Magento (possibly others)
Selected Customers:	Georgia Tech, Arizona State University
Website:	www.silverpop.com

sparkroom

Profile:	Enrollment marketing automation intended for higher ed enrollment
Price:	Pricing not publicly available
CRM Integration:	CRM integration not publicly available
Selected Customers:	Westwood College, Virginia College, Tiffin University, Rutgers Online, University of Nebraska Online Worldwide, Grand Canyon University
Website:	www.sparkroom.com

Marketing Software Scenario Mapping Exercise

Many COE administrators are intrigued by the idea of acquiring a marketing automation system to more effectively manage their marketing channels, generate leads, and automate repetitive tasks and workflows. However, without carefully identifying gaps in their current processes prior to acquisition, it is impossible for institutions to determine whether marketing automation is the appropriate solution to reach their desired future state. Through a series of scenarios, this exercise is designed to help units identify and prioritize their current marketing challenges and determine whether marketing automation or another solution is best suited to solve their problem.

First, answer the list of questions in the table below under "Problem Scenario" to determine whether the particular scenario applies to your institution. If it does, review the second and third columns to determine whether marketing automation offers a solution to that scenario or whether alternative options may be more practical. Please note that the solutions offered by either marketing automation or alternative options may not necessarily apply to every vendor option available, but rather indicate that certain products within each category could address the problem scenario and require further investigation. Designate whether the problem scenario is relevant to your institution by checking the box in the last column. When finished, examine whether the scenarios you've identified necessitate the acquisition of marketing automation software or whether a different product might better fit your needs. The results of this exercise can also be used to inform software vendor assessment; use the exercise to ensure that potential vendors can articulate how their product addresses the challenges identified.

Once this exercise has been completed, proceed to the readiness diagnostic in Tool 5: Marketing Automation Readiness Diagnostic to assess whether your institution is prepared for the adoption of marketing automation software and where improvements or attention may be needed before acquiring a system.

Problem Scenario	Potential Solutions Based in Marketing Automation	Alternative Solutions	Applicable to Our Unit? (Check if Yes)
Lead Management			
Lead behavior on our website isn't captured effectively, which is causing us to miss out on opportunities to better engage with these prospects both pre- and post-identification.	Marketing automation systems can track both known and anonymous prospect behavior on your website, helping to further engage with known leads while building a profile for anonymous leads prior to identification.		
We don't know what happens to our leads after they begin an application or are handed off to other departments.	Marketing automation systems can track prospects across the funnel.	**A CRM system** can also establish a record of contact between the prospect and the institution.	
All of our prospects are considered equally viable candidates for conversion, regardless of when they identified or how often they've engaged with our institution.	Marketing automation systems enable institutions to score leads, factoring in their level of engagement and activity to determine their warmth and likelihood of conversion.	**Some CRM systems** can also accomplish lead scoring and identify warmer prospects.	
Our prospect data is housed across several databases, spreadsheets, and departments.	Marketing automation systems can aggregate disparate information on prospects to form comprehensive profiles. Systems collect data on a prospect's interactions across a number of channels, such as their webinar and event attendance, email response rates, and web browsing patterns.	**A CRM system** can also aggregate prospect information although the profiles will be more focused on a record of communication between the institution and the prospect.	

Problem Scenario	Potential Solutions Based in Marketing Automation	Alternative Solutions	Applicable to Our Unit? (Check if Yes)
Our follow-up with prospects is often delayed because we don't know the timing of initial inquiries, web activities, or email engagement.	Many marketing automation systems can provide real-time feedback when prospects engage in specific behaviors or take certain actions.	**Some CRM systems** can also be customized for this functionality.	
We don't have insight into whether we've contacted a prospect, how frequently we've interacted, and through what channels interaction has occurred.	Some marketing automation systems can track interactions between groups of prospects and the institutions but typically lack a comprehensive record of an individual prospect's interaction with an institution.	**A CRM** system will track all interactions between the prospect and the institution and is designed to specialize in relationship monitoring of this nature.	
Our marketing emails and campaigns don't target narrow groups of prospects. Instead, all of our prospects typically receive the same marketing messages.	Marketing automation systems specialize in offering drip email marketing campaigns that capitalize on granular detail about prospects, effectively segmenting messages to different groups of prospects.	**Email marketing systems** can also accomplish this feature.	
We're using social media for brand building but we haven't been able to convert or find leads through those networks.	Marketing automation systems have a number of capabilities that capture new leads from social media and track social media engagement with prospects.	Some niche products such as **Meltwater Buzz** (http://www.meltwater.com/) specialize in social media marketing capabilities.	
Content Creation and Management			
We have many diverse, niche programs, but all of our institutional leads are being funneled to the same form/website regardless of the program they're interested in.	Marketing automation systems are able to design landing pages tied to individual programs. This is easier to do with a marketing automation tool and also allows linkages to program-specific banner ads.	**Some CRM systems** can also design landing pages tied to individual programs. **Unbounce** (http://unbounce.com/) is an inexpensive software alternative that focuses solely on landing pages.	
We've thought about creating comprehensive online ad campaigns that tie together banner ads, email ads, landing pages, and other resources, but we don't have the time.	Marketing automation systems can create online ad campaigns with multiple dimensions that include email marketing, landing pages, banner ads, webinars, and more.	**Email marketing systems** can create comprehensive campaigns solely centered on email drip campaigns.	
Analytics and Reporting			
We pay for search keywords and pay-per-click ads but we aren't sure whether we're getting reasonable ROI.	Many marketing automation systems can provide insight into marketing spend and campaign ROI.		
We can't determine what lead sources are producing the highest quality leads, making it difficult to adjust spend.	Marketing automation systems heavily focus on providing reports on lead source efficacy and where prospects are most likely to come from, although the specific design of those reports varies by system.	**Some CRM systems** may be able to offer some basic reporting functions, but this is not guaranteed or as robust.	

Problem Scenario	Potential Solutions Based in Marketing Automation	Alternative Solutions	Applicable to Our Unit? (Check if Yes)
We have a high volume of emails and many banner ads, but we don't know which ones are most effective at garnering clicks and reads.	Marketing automation systems provide insight into email and ad effectiveness by offering A/B testing options.	**Email marketing systems** can provide insight into the effectiveness of different emails at generating clicks and reads, but will not provide insight into banner ads.	
We need better insight into how our website leads to conversions and how visitors engage with our site content.	Marketing automation systems can provide web analytics that identify how known and anonymous prospects use and browse the website, and how they convert from the site.	Software solutions such as **Google Analytics, Optimizely** (https://www.optimizely.com/), and **Visual Website Optimizer** (https://vwo.com/?v=3) can provide data on website usage and conversion success.	
Email Marketing			
We spend too much time manually drafting emails to prospects.	Marketing automation systems can send automated emails as part of a broader campaigns, but can also respond to specific actions taken by prospects across different channels.	**Email marketing systems** also perform this function at a lower cost. **Some CRM systems** can also carry out automated email messages on a smaller scale.	
Staff time is spent on prospect follow-up rather than content creation.	Marketing automation systems automate the process of email follow-up.	**Email marketing systems** also automate the process of email follow-up.	
Our prospect follow-up (phone, email) is not standardized and too often dependent on staff availability.	Marketing automation systems can help automate interaction with prospects who take certain predetermined actions, saving staff time.	**Email marketing systems** can also accomplish this but automated follow-up may not be triggered by web-based activities and is solely through one channel.	
Planning			
We have trouble coordinating and maintaining our calendar across the entire marketing department.	Some marketing automation systems offer calendaring tools.		
We often deviate from deadlines for campaigns or lead follow-up.	Marketing automation systems can send emails to prospects on a pre-set schedule.	**Email marketing systems** can also follow preset schedules for follow-up.	
We have trouble creating easy-to-follow and transparent marketing budgets.	Some marketing automation systems offer budgeting tools.	Some niche marketing software products such as **Allocadia** (http://www.allocadia.com/) specialize in budgeting tools.	

Marketing Automation Readiness Diagnostic

Although unit leadership may determine that marketing automation presents an opportunity to improve marketing and recruiting efforts, this does not necessarily guarantee that a unit has the resources, internal knowledge and data, and scale to move forward with effective implementation.

Complete the three-step process in this tool to determine whether your institution can effectively and efficiently proceed with the purchase and implementation of a marketing automation system.

This tool should be used only after determining that marketing automation makes sense for your unit and that your strategic priorities will be effectively served by acquiring a system. To determine whether marketing automation uniquely addresses your unit's challenges, complete Tool 4: Marketing Software Scenario Mapping Exercise, which walks through scenarios that can be managed through both marketing automation software as well as other technology solutions.

Step 1: Diagnostic Exercise

Rate your readiness for each question on a Likert Scale, with 1 being "strongly disagree" and 5 being "strongly agree."

For some questions requiring insight into unit- or program-level metrics, an inability to effectively determine or estimate a number should be taken as an indication that the unit is not ready regarding that question and should merit a lower score.

For each of the five consideration sets (budget, organizational capacity, portfolio size, lead volume, and lead conversion and outcomes), count the number of points to determine a total score.

Budget	**Strongly Disagree** ← → **Strongly Agree**
We have the budget to support both the initial up-front purchase and implementation costs, as well as the monthly or annual costs required to access contacts	1 2 3 4 5
We have the budget available to hire additional staff if necessary	1 2 3 4 5
We have resources in reserve to, if necessary, hire external consultants to train our staff on use of the system, to support system downtime, and to maintain backups of the database	1 2 3 4 5
We do not anticipate any budget reductions that will hamper our ability to maintain a monthly or annual contract with a marketing automation vendor	1 2 3 4 5
Total Score	________

Organizational Capacity	**Strongly Disagree** ← → **Strongly Agree**
We have staff dedicated to implementing, learning how to use, and maintaining the system	1 2 3 4 5
We have staff available to create content to populate our pending marketing campaigns	1 2 3 4 5
Our current marketing and recruiting staff are clearly assigned to groups of leads or different programs and have a clear sense as to their lead management responsibilities	1 2 3 4 5
We lack an existing internal software system that can accomplish the goals we intend to meet with a marketing automation system	1 2 3 4 5
Total Score	________

Portfolio Size	Strongly Disagree ⟷ Strongly Agree
We have enough programs (at least four) for which we would like to design campaigns	1 2 3 4 5
We intend to either maintain our current robust portfolio size or are planning on growing to a robust portfolio size in the near future	1 2 3 4 5
Our programs are distinct enough that the target audiences for each program merit segmentation	1 2 3 4 5
We have a robust and diverse individual course portfolio that typically attracts lots of demand but is difficult to market	1 2 3 4 5
Total Score	________

Lead Volume	Strongly Disagree ⟷ Strongly Agree
We can identify how many known leads we have for each program and course, and how frequently these leads come in	1 2 3 4 5
We think our lead volume is currently large enough that we cannot respond in a timely and effective fashion solely via a manual process managed by our current staff	1 2 3 4 5
We have clear goals as to what our lead volume targets are or what they need to be to sustain enrollments	1 2 3 4 5
We see a substantial amount of website traffic that fails to identify or apply to our programs, or we lack insight into our web analytics	1 2 3 4 5
Total Score	________

Lead Conversion and Outcomes	Strongly Disagree ⟷ Strongly Agree
We have the ability to determine what our lead conversion rates are for each program or for all programs overall	1 2 3 4 5
We think that we've exhausted internal solutions to converting more of our existing leads into conversion	1 2 3 4 5
We have clear goals as to what our lead conversion rate should be and how far from those goals we are	1 2 3 4 5
We've exhausted all internal options for determining the ROI of our current marketing efforts	1 2 3 4 5
Total Score	________

Step 2: Consideration Set Readiness Assessment

Review the five total scores from Step 1 and complete the short exercise below to determine how prepared your unit is overall. This process will help you determine just how close your institution is to readiness, even if some sectors may not be as far along as others.

- **17-20:** This consideration set is in good standing
  How many sets have a score of 17-20:____ x 2= __ Total Readiness Points
- **11-16:** This consideration set still needs work to be ready for marketing automation
  How many sets have a score of 11-16: ___ x 1= __ Total Readiness Points
- **4-10:** This consideration set is far from ready
  No readiness points assigned

Step 3: Unit Readiness Assessment

From Step 2, record your total number of readiness points to determine whether your unit is ready to move forward with marketing automation implementation.

Total Readiness Points: ___

9-10 Readiness Points: Ready for Implementation: The COE unit has sufficient resources, an appropriate portfolio, and the demand and lead volume that would be well served by acquiring marketing automation. Any questions answered with less than a 4 for "agree" should be addressed before implementation.

6-8 Readiness Points: Not Quite Ready: While marketing automation would be useful, the COE unit has greater priorities at this time, which may include diagnosing whether lead acquisition or conversion poses a greater challenge, securing budget and staff, and exhausting all internal opportunities to improve marketing and recruiting efforts.

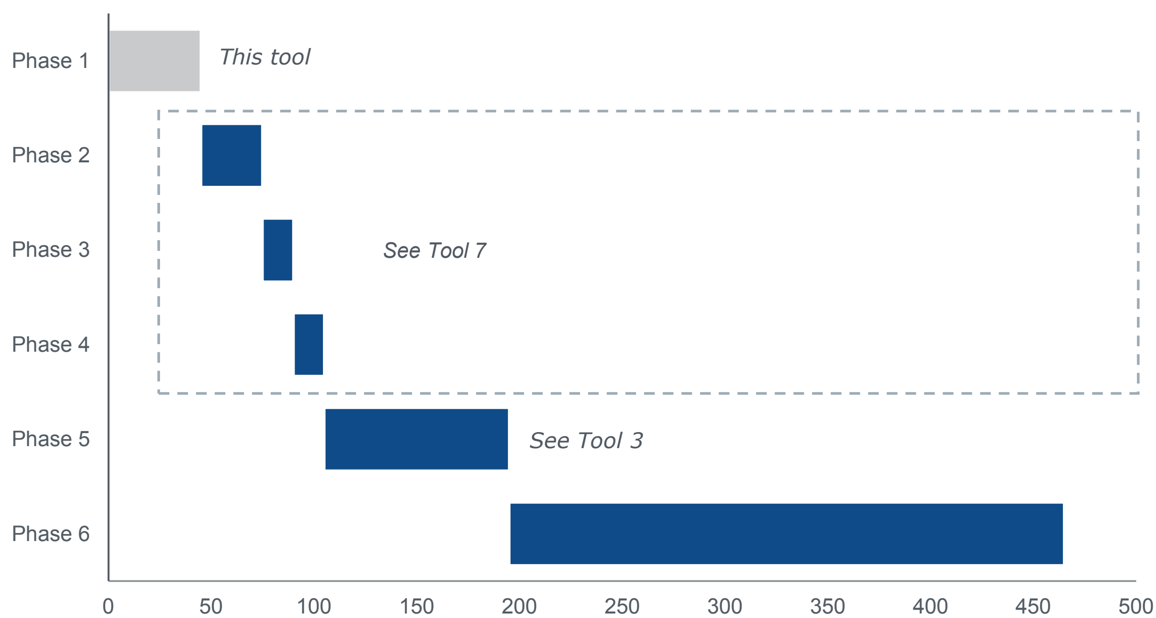
0-5 Readiness Points: Not Ready: The COE unit needs to address fundamental issues before considering marketing automation. It may lack the resources to implement, staff, and maintain marketing automation, as well as a clear sense of what problem marketing automation needs to solve.

Marketing Process and Resource State Assessment

Despite determining a legitimate need for marketing automation software, many institutions choose to purchase and implement a system without considering how staffing, resources, staff responsibilities, and work processes will be affected. As a result, hidden transaction and implementation costs can cause the acquisition of a marketing automation system to become more burdensome and complicated than anticipated.

By investing time and energy in taking inventory, assigning roles, and planning for contingencies prior to implementation, institutions can avoid time-consuming hurdles and unexpected costs during the lengthy vendor selection and software implementation phases. The chart below demonstrates the amount of time, in days, that each phase can be expected to take. Please note that only Phase 1 is addressed in this tool; refer to the chart below to find additional tools for other phases.

Days Allocated for Phases of Marketing Automation Preparation and Implementation



Phase 1: Assess inventory

Phase 2: Determine staff capacity and brainstorm roles for transition process

Phase 3: Assign roles for post-implementation environment

Phase 4: Prepare for contingencies and risk scenarios

Phase 5: Vet and select vendors

Phase 6: Implement and introduce marketing automation software

To prepare for the impact of marketing automation adoption, answer the following questions on your currently available resources and current marketing processes. Answer each question and provide specific costs or values when possible. In the event that you cannot provide specific numbers or values, you may need to engage in preparation and internal research in that area.

To complete the following exercises, the COE unit's marketing director, marketing and recruiting staff, program directors, IT representative, and a COE dean or senior administrator with budget authority will need to provide feedback and information.

Existing Software

Take inventory of your current software used in marketing and recruiting functions to ensure that your unit has maximized the utility of each and to determine how these solutions will integrate with marketing automation.

Q: What software systems and packages do you currently use to assist with marketing and recruiting efforts?

Use the following table to assess the value currently extracted from existing software packages, such as the CRM or email marketing system. You may need to revisit your existing software to learn whether certain marketing-related features are being underutilized and if so, why that may be the case. Please reference Tool 4: Marketing Software Scenario Mapping Exercise for additional information and guidance.

Name of Current Marketing Software	Functionalities Underutilized	Do We Measure ROI?

Q: Will you need to integrate any of these systems or other third-party applications and software with a marketing automation system? If so, which ones?

Available Financial Resources

Determine your available financial resources to ensure that you can adequately fund marketing automation implementation as well as potential unforeseen expenses related to implementation.

Q: How much can you reasonably afford to spend to acquire a new system? Write down the amount you can invest for starting costs, as well as how much you can invest annually for maintenance and licensing.

Q: Do you have financial resources allocated to support any potential system downtime or maintenance, or for the services of an external consultant to help implement the system?

Content

Assess your content needs to determine how much effort you will need to devote to preserving existing marketing content or creating new content to live in the marketing automation system.

Q: Will you need to migrate content to a marketing automation system?

Q: How much existing marketing content and collateral do you want to preserve for continued use in future marketing campaigns and efforts? For example, consider content such as banner ads developed in conjunction with other third-party providers or in-house that will need to be migrated and supported in a marketing automation system for preservation.

Lead Database

Assess your current lead database to determine whether these prospects will need to be archived or preserved upon migrating to a new marketing automation system, and how much effort this process will require.

Q: Do you have a robust lead database that will need to be migrated? Consider leads that may be currently housed in rudimentary Excel documents or homegrown systems that will be replaced by marketing automation.

To assess ROI on a marketing automation purchase, it is essential to first baseline current resources, processes, marketing metrics, and states of practices to serve as a point of comparison to the post-implementation state. The next three sections address this concern.

Current Lead Cultivation and Management Processes

Q: What are your primary lead sources?

Q: How are leads generated? What are the most productive lead-generation channels?

Q: What processes are currently in place to nurture new prospects? Describe the typical journey that a prospective applicant would go through; focus on touchpoints or interactions for prospect communication and how leads are nurtured from cold lead status to post-inquiry and post-application status.

Marketing Metrics

Complete the following table to assess your current state of marketing practice and your post-implementation goals.

Hard Metrics	Current	Future Goals
Total Leads, All Programs		
Total Conversions, All Programs		
Cost per Lead		
Custom:		
Custom:		
Custom:		

Staff Roles and Responsibilities

Q: How do you obtain access to marketing and recruiting information and insight into marketing and recruiting effectiveness? Describe your current process and how you would like to improve this.

Q: How do sales, marketing, and recruiting staff interact when managing prospects? How do those functions align and how would you like to improve this process to improve prospect management and handoffs?

Q: Describe the typical daily lead generation and management responsibilities for each of your core marketing and recruiting positions.

Portfolio

Complete the table below to assess your current portfolio and how each program fits into your marketing automation adoption plan.

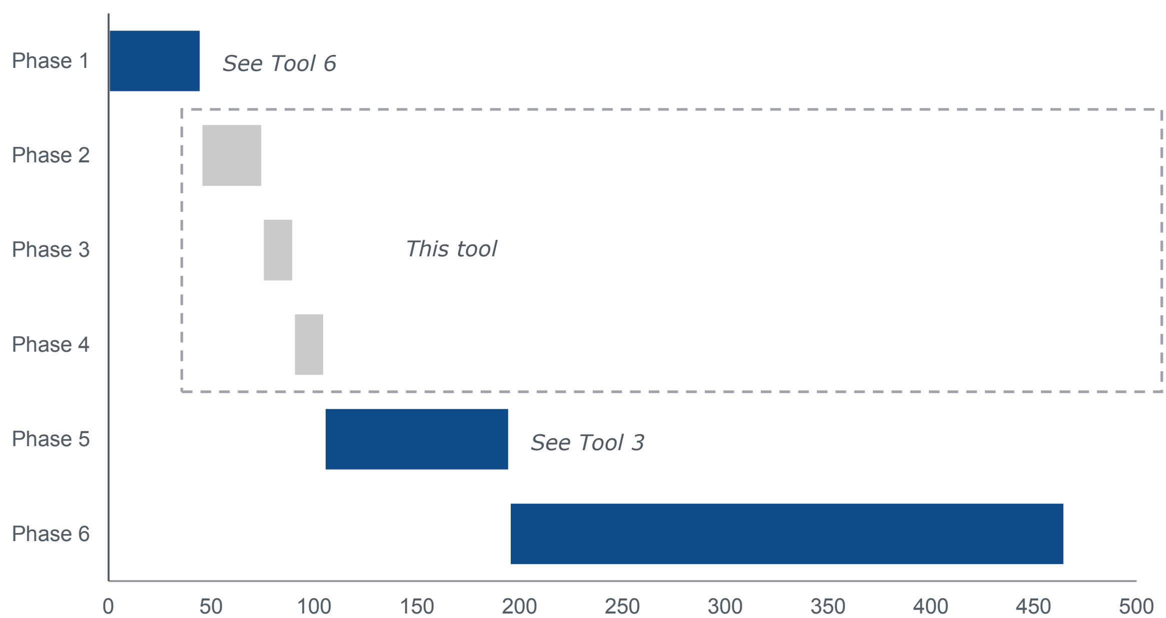
List all programs that might benefit from marketing automation	How many leads does each program have?	How many enrollments do you need to secure for this program each year?	What challenges do you currently see with marketing and recruitment for these programs?	How many staff members handle marketing and recruitment for each program?

Marketing Automation Risk and Adoption Planner

Despite determining a legitimate need for marketing automation software, many institutions choose to purchase and implement a system without considering how staffing, resources, staff responsibilities, and work processes will be affected. As a result, hidden transaction and implementation costs can cause the acquisition of a marketing automation system to become more burdensome and complicated than anticipated.

By investing time and energy in taking inventory, assigning roles, and planning for contingencies prior to implementation, institutions can avoid time-consuming hurdles and unexpected costs during the lengthy vendor selection and software implementation phases. The chart below demonstrates the amount of time, in days, that each phase can be expected to take. Please note that this tool addresses only Phases 2-4; refer to the chart below to find additional tools for other phases.

Days Allocated for Phases of Marketing Automation Preparation and Implementation



Phase 1: Assess inventory

Phase 2: Determine staff capacity and brainstorm roles for transition process

Phase 3: Assign roles for post-implementation environment

Phase 4: Prepare for contingencies and risk scenarios

Phase 5: Vet and select vendors

Phase 6: Implement and introduce marketing automation software

To prepare for the impact of marketing automation adoption, answer the following questions on Phases 2, 3, and 4 to diagnose where your institution has an adequate change management strategy and where your institution needs to invest more time or attention before implementing a marketing automation system. Answer each question and provide specific costs or values when possible. In the event that you cannot provide specific numbers or values, it may be indicative of the need for further preparation and internal research in that area.

Phase 2: Determine Staff Capacity and Brainstorm Roles for Transition Process

During this phase, the COE unit's marketing director and marketing and recruiting staff should be responsible for participating in and completing the following exercises.

Impact on Current Staff

Q: How many staff members do you currently have responsible for lead management? List out each staff member and the program or programs for which he or she is responsible, as well as how responsibilities might change with the implementation of a marketing automation system. Use the given example as a guide.

Lead management staff	Current responsibilities	Post-marketing automation implementation responsibilities
Recruitment coordinator #1	*CRM management, prospect management for bachelor's degrees*	*CRM management, prospect management for bachelor's degrees, creation of content and campaigns within marketing automation system for bachelor's degrees*

Q: Do you have available staff who will provide technical support for a marketing automation system?

Impact on Current Departments

Q: What departments and units will be affected by marketing automation adoption?

Q: How will affected departments be involved or included in the rollout or introduction of a marketing automation system?

Q: How will roles change across affected departments when the system is fully implemented? Complete the following table for all current departments that are involved in marketing and recruiting functions.

Department	Current responsibilities	Post-marketing automation implementation responsibilities

Phase 3: Assign Roles for Post-implementation Environment

During this phase, the COE unit's marketing director and marketing and recruiting staff should be responsible for participating in and completing the following exercises.

Staff Reorganization

Q: How many staff will you need to train to use marketing automation systems?

Q: Will any staff previously involved in marketing and recruiting functions see their responsibilities diminish as a result of marketing automation's impact on scale? What will these staff do with their additional time?

Q: How will lead management responsibilities change, if at all?

Extracting Value from the System

Q: Who will be responsible for creating content within the system? List out each point of contact for every program that will be managed within the new system and the content they will need to develop.

Program	Point of contact	Content needed

Q: Who will be responsible for developing a lead scoring system, if anyone?

Q: Who will be responsible for responding to analytics and ROI reports produced by the system? How do you plan to act on those insights?

Phase 4: Prepare for Contingencies and Risk Scenarios

During this phase, the COE unit's marketing director, marketing and recruiting staff, and an IT representative should be responsible for participating in and completing the following exercise.

Use the following table to forecast post-purchase implementation costs and risk scenarios, and determine what solutions you will be able to put in place should they arise.

Item	Cost/outcome/effort	Solutions
External Consultants		
CRM Integration		
Staff Training and Re-skilling		
New Staff Hires		
Content Creation		
Service Downtime		
Cost of Upgrades		
Custom:		
Custom:		
Custom:		