

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 templated 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		✓	