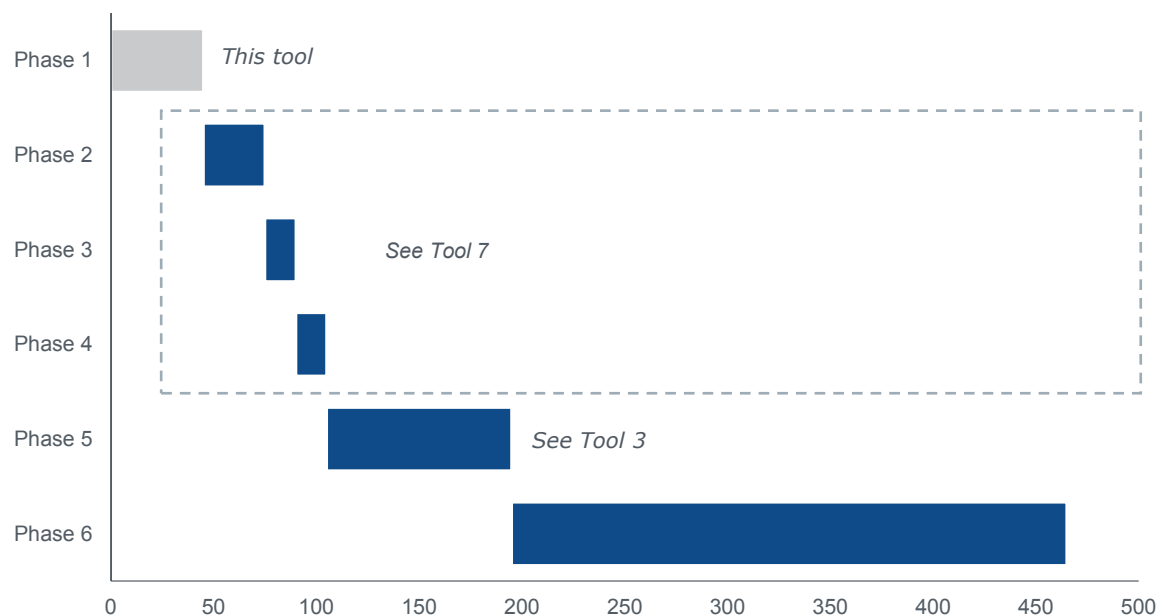


Marketing Process and Resource State Assessment

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?