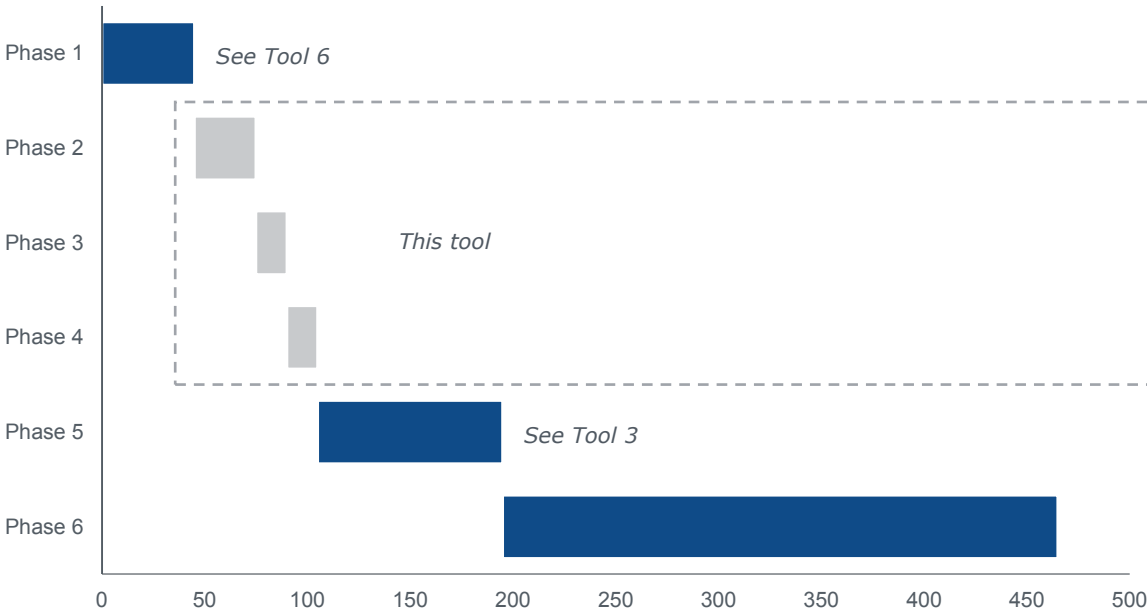


Marketing Automation Risk and Adoption Planner

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
<i>Recruitment coordinator #1</i>	<i>CRM management, prospect management for bachelor's degrees</i>	<i>CRM management, prospect management for bachelor's degrees, creation of content and campaigns within marketing automation system for bachelor's degrees</i>

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:		