



Implementation Toolkit

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Implementation Toolkit

Critical Disciplines to Grow Employer Partnerships

SECTION

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Tool 1: Differentiation Brainstorming Guide

Purpose of the Tool

Many institutions looking to partner with employers struggle to differentiate their own offerings from alternatives in an increasingly crowded training marketplace. Without a clearly articulated message, externally facing university stakeholders will struggle to scale outreach to employers and deepen or renew existing relationships. This can result in unintended consequences including under-representing the full benefits of a university partnership or using imprecise language in sales messaging that doesn't resonate with employer needs.

Convening stakeholders at your institution and defining unique differentiators can result in the added benefits of institutional alignment and confidence in messaging. Circulate the brainstorming guide below to members of your COE unit (B2B sales, marketing, program development) as well as academic department partners and senior leaders in externally facing units to determine how to best position your university's offerings in the employer marketplace.

Brainstorming Differentiators

Items to Consider	Response	Supporting Evidence
<p>How does our institution's programs or services help partner organizations:</p> <ul style="list-style-type: none"> • Attract or retain employees? • Add a critical skill set? • Improve operational efficiency? • Increase revenue? • Manage risk? • Improve/maintain product quality? • Build and strengthen brand? 	<p><i>Example: Project management training can make an immediate impact on organizational effectiveness through development of root cause analysis skills. We've also seen employers improve employee retention through a "cohort" effect that builds camaraderie and signals investment in personal growth.</i></p>	<p><i>Example: Our project management certificate program trained 23 mid-level managers at Employer X in 2015. Employer X saw an immediate increase in retention among the management cohort in the program—who on average stayed with the company an extra year longer than their peers. This saved employer X over \$300k in recruitment and retraining costs in 2016.</i></p>
<p>How have your best current employer partners chosen to utilize university programs or services? This could indicate a strength that was previously ignored.</p>		
<p>What would a new hire in your unit say are your strengths? This perspective could help break through status quo thinking.</p>		



Key Note

Differentiators are not...

- Always programs. Instead, consider what elements of delivery model, curriculum, or student support set your program apart from competitors. Only in rare cases are programs themselves differentiators.
- Always inexpensive. Some institutions succeed in competitive B2B markets by establishing that university services are worth the additional expense.
- Always about the employer. Consider how you can serve individual employees and meet their long-term career goals.

Source: EAB interviews and analysis.

Tool 1: Differentiation Brainstorming Guide (cont.)

Short List of Differentiators

Items to Consider	Answer	Is this unique? Valuable? Proven?
What do we believe are the four strongest differentiators for our programs and services?	1. 2. 3. 4.	
How would our employer partners articulate what they believe are the strongest differentiators for our programs and services?	1. 2. 3. 4.	

Capturing External Perception from Current Partners

Units that already engage in productive partnerships should also engage their end users to impart an industry perspective on their institution's programs and services. Employer insights have the benefit of being in industry-centric language, increasing the likelihood these messages will resonate with employers.

For this exercise, designate the partnership's relationship owner to set up a phone conversation or in-person meeting with your partnership contact. Use the following questions as a rough guide for an informal conversation about the value of higher education partnerships. Once the interview is complete, brainstorm ways to serve that current partner more deeply, or alternately, hypothesize how you might message your value statement to prospective partners in the future.

Question	Partner Response	Institution Opportunities
What would you say are your organization's three to five most pressing challenges for the coming year?		
What are your strategic priorities for the coming years?		
What do you look for in a training/education partner organization? How would they help you meet your business goals?		
What have been the impacts of working with our institution? Have there been any non-obvious or unanticipated benefits?		

Source: EAB interviews and analysis.

Tool 2: Employer Lead Scoring Rubric

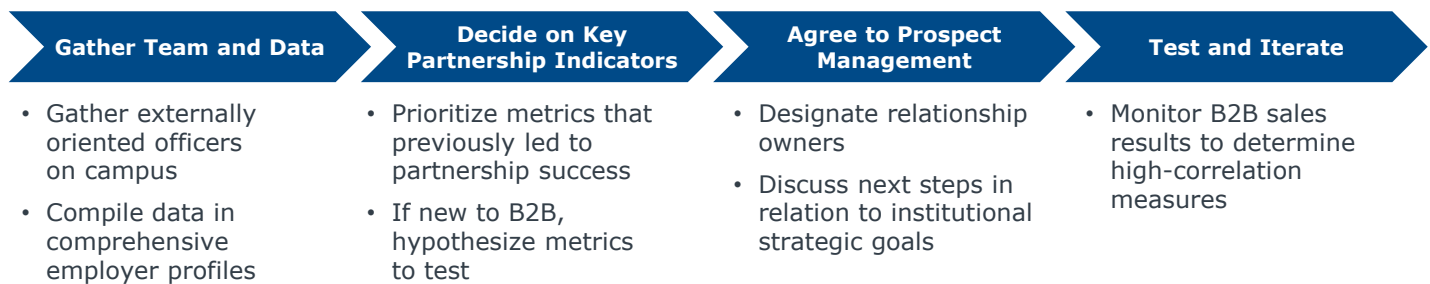
Purpose of the Tool

Even institutions that are able to identify warm leads for partnership struggle to (1) prioritize among those partnerships and (2) convey the full scope of institutional offerings with comprehensive messaging.

By bringing together stakeholders at your institution to share data about existing employer relationships, you are able not only to build a holistic picture of previous engagement but also to drill deeply into existing data to determine what measures correlate with partnership success. Since employer engagement is a time-intensive process, prioritizing leads can ensure B2B marketing efforts remain focused on high-conversion prospect leads.

The following process and table illustrate how you can leverage a lead scoring rubric to gather data and monitor metrics correlated with B2B success. While this process functions best as part of a cross-silo collaboration on campus, it is still effective as an exercise within units or colleges. Bring together data to create an employer profile first, and then determine weighted scores based on correlation with a future partnership. Score weighting can continually be reassessed and tweaked as your B2B business evolves and matures.

Process for Employer Lead Scoring



Example Lead Scoring Exercise

Every externally oriented function at the institution should contribute data, if possible.

Fit scores should reflect both the predictive power and quantity of a given measure. For example, if employed alumni is a high-priority measure, staff might assign one fit score point for every three employees, on a continuous scale.

Metric	Metric Source	Value	Fit Score	Next Steps and Owner
Number of internships	Career Services	5 per year	+2	Grow 10%; VP of Workforce Development
Research dollars	Office of Research	\$250,000 per year	+1	Meeting with major research partner; VP of Research
Gifts and donations	Institutional Advancement	\$100,000, one-time	+2	Re-engage with donor; VP Advancement
Number of alumni employed	Alumni Relations	17 FTE	+5	Host alumni reception; VP Advancement

Add weighted metric scores to compile an employer's fit score, which can then be used **to prioritize among a list of prospects.**

Many institutions prioritize employed alumni as the highest-impact measure of institutional fit

Source: EAB interviews and analysis.

Tool 3: Employer Talent Assessment Template

Purpose of the Tool

COE custom and contract training proposals are typically constructed after a university's initial interaction with an individual corporate executive. This reactive approach is problematic for two reasons: one, role-based bias and organizational silos typically prevent the HR representative in charge of liaising with the university from accurately describing the training need; two, waiting until after the first in-person interaction has occurred to create a proposal does not leave time for a COE unit to create a nuanced proposal, resulting in stalled approval processes.

By proactively offering assessment services, universities can demonstrate tailored customer insight in the negotiation process and design a proposal that appeals to multiple influencers within the organization. UC Irvine's standardized needs-assessment helps the primary purchaser navigate internal silos while also gathering information pertinent to program design. B2B sales representatives should use this tool early in the sales cycle, typically in their initial conversations with HR executives.

Assessment



Company Information

Key Questions/Information	Response
What is the name of your company?	
Purchaser contact information (name, title, email, phone number, other purchasers)	
How did you hear about working with our unit?	<ul style="list-style-type: none"> • Internet search • Professional association • Internet ad • Word-of-mouth referral (if so, by whom?) • Print ad

Training Needs Analysis

Key Questions/Information	Response
What are the specific reasons for this training request?	
Who is requesting this training, i.e., the target audience, senior leadership, a given department, human resources, training and development, management?	

Tool 3: Employer Talent Assessment Template (cont.)

Key Questions/Information	Response
Who is sponsoring/paying for this training or partnership, i.e., the target audience, senior leadership, a given department, human resources?	
What are the specific goals/learning objectives and outcomes of this training?	
Is the request motivated by deficient performance? If so, what is the issue, and how is it affecting your business?	
Are any new processes, workflows, or employee expectations being put in place?	
Are there existing best practices or company processes that we should embed in training or course programming?	

Audience Profile

Key Questions/Information	Response
Who is the audience for this training or partnership?	
What are their job titles? What departments do they work in?	
What are the primary responsibilities of the audience?	
What is the anticipated number of employees needing training or development?	
What experience profile do these employees possess, i.e., years of professional experience, education level?	
What is the general attitude of the audience toward the training?	
Have there been previous attempts to provide training or development for this audience in this competency area? Was it well received? Was it effective? Were there any lessons learned?	

Source: EAB interviews and analysis.

Tool 3: Employer Talent Assessment Template (cont.)

Key Questions/Information	Response
Is this training or program mandatory? How will that impact attendance? Are there any incentives or consequences attached to attendance?	

Program Delivery and Logistics

Key Questions/Information	Response
What is the ideal time frame for delivering training or enrolling in programming?	
Is there a deadline for completion? Any other causes for urgency in program launch or completion?	
What is the preferred delivery method for training?	<ul style="list-style-type: none"> • Face-to-face • Face-to-face, on-site at employer • Online, synchronous • Online, asynchronous • Blended

Marketing

Key Questions/Information	Response
Do you need assistance with promoting this training or program to your employees?	
If marketing assistance is needed, what channels do you think would be most effective with your employees?	<ul style="list-style-type: none"> • Email • On-site information sessions • Flyers and physical collateral • Webinar
Would your employees benefit from/enjoy occasional updates on our institution's program offerings for career development?	

Tool 4: Corporate Buyer Archetypes

Purpose of the Tool

As organizations grow and become more complex, universities must position themselves to speak not only to high-priority strategic objectives but also to the discrete outcomes that individual officers seek. Without an understanding of these corporate buyers, partnership pitches can fail to convince stakeholders to agree on a purchase.

By first understanding the role of each buyer, and then highlighting services that address their constituent concerns, institutions can navigate tricky internal corporate politics while speeding a consensus purchase decision. While universities may struggle to appeal to every stakeholder, appealing to multiple advocates is sure to streamline the B2B sale process.

This tool highlights the key concerns, responsibilities, and trends that are likely to influence various corporate buyers. B2B sales practitioners can use this tool in conjunction with Tool 5: "Marketing Strategies for Multiple Influencers," which provides a practical exercise of taking a standard marketing pitch and tailoring it to the unique perspective of each corporate buyer.

1 Chief Information Officer

Key Concerns



Expansion of IT purchase impact on operations and revenue



Growth of off-site cloud services to host data and IT functions



Volatile and rapidly changing market for technology and IT products



Increasingly need colleague buy-in for major decisions

2 Chief Human Resource Officer

Key Concerns



Attracting and retaining top talent



Developing staff leadership capabilities



Managing employee performance



Balancing compensation and benefits with financial circumstances

Key Metrics

Project Cost and Delivery

Revenue Growth

End-User Satisfaction

Security

Key Metrics

Cost per Hire

Cost per Vacancy

Turnover by Employee Segment

Time to Fill

Resonant Message

"We know that as a CIO in today's business climate you're increasingly seeking cost and budget flexibility so that you can quickly shift priorities to account for emerging technology. Our expert faculty can consult on cutting-edge technology to ensure that your IT purchases align with the market. We're also aware that innovation is more important than ever. Hiring our graduate student interns can bring fresh perspective on new technologies without the cost of a major purchase or upgrade. More, our leadership training can support your current IT employees in developing collaborative skills that they increasingly need."

Resonant Messages

"Identifying the best way to boost employee performance while also attracting and recruiting new talent is a difficult task in today's hiring environment. When you partner with us, you can consider our career services office as an extension of your recruiting staff. We also offer a wide variety of leadership development opportunities including faculty-led workshops, certificates, and an MBA program to ensure that you can develop employees to maximize workforce performance. Across the board, partnering with a university is one of the most cost-effective ways to move the dial on employee retention."

Source: Von Simson, Ernest, "The New Role of the CIO," Bloomberg, 2013; Charan, Barton, and Carey, "People Before Strategy: A New Role for the CHRO," *Harvard Business Review*, July 2015, EAB interviews and analysis..

Tool 4: Corporate Buyer Archetypes (cont.)

3 Chief Learning Officer

Key Concerns



Boosting employee performance



Engaging line managers



Creating a culture of learning



Identifying and augmenting key performance competencies

Key Metrics

Learner Satisfaction

Employee Performance and Retention

Talent Management Innovation

Resonant Messages

“Integrating talent capabilities, organizational strategies, and business strategies is no small feat. Graduate-level education for your mid-level employees could be the key to unlocking the self-sufficient, problem-solving workforce your business needs. Our business faculty will help build the culture of learning among your employees that will pay dividends down the line. They’ve also worked with hundreds of companies, so they can elevate your perspective and find the key levers to productivity.”

4 Business Line Manager

Key Concerns



Reaching annual revenue targets



Retaining key performers



Identifying new strategies for growth



Connecting strategy with line operations

Key Metrics

Individual Employee Performance

Revenue Production

Employee Morale

Resonant Messages

“As a business line manager, you’re a major driver of employee performance. Our professional development sessions can maximize your time management skills so you can budget your time working on strategy and overseeing your line employees. Our faculty might help you see the larger competitive landscape. Make sure you build your strategy with the right information and context. Last, we also have customized training services for your employees. Providing educational credentials to employees will help them see a long-term future with your company.”

Tool 5: Marketing Strategies for Multiple Influencers

Redefining Messages by Role of Organizational Buyer

Purpose of the Tool

Decision-making is driven by consensus at most organizations today. Articulating the value of a partnership with your institution requires convincing a range of executives, from business managers to Chief Information Officers. This exercise aims to help members frame the value of a particular program or service in terms that will resonate with a variety of possible stakeholders.

1. Select a program or training service that your institution has attempted to sell to partners in the past or intends to offer in the near future. Create a 30-second pitch that you would use to present the value of your university as a partner.

Program/Service Name _____

30-Second Pitch _____

2. How would you amend the message to resonate with each typical corporate buyer below?

1 Chief Information Officer

Key Concerns: expansion of IT purchase impact, rapid market change for IT products, needs colleague buy-in for purchases

Likely Questions:

- Why partner with a university when so much training content is available online?
- How do you ensure your training and programs are current and remain relevant?



2 Chief Human Resource Officer

Key Concerns: attracting and retaining talent, developing leadership capabilities, managing employee performance

Likely Questions:

- How will a university partnership help me retain my most talented employees?
- Why would I invest in leadership training for millennials who will leave in two years anyway?



Tool 5: Marketing Strategies for Multiple Influencers (cont.)

3 Chief Learning Officer

Key Concerns: boosting employee performance, engaging line managers, creating a culture of learning

Likely Questions:

- How will you motivate my employees to maximize training value, rather than just showing up?
- Can you help us redefine employee performance and success?



4 Business Line Manager

Key Concerns: hitting annual revenue targets, retaining key performers, exploring new markets for expansion or growth

Likely Questions:

- How will this improve my revenue targets for this financial year?
- How can you assure me that you fully understand my industry and market?



For more information on speeding decision in a consensus purchase, see disciplines 3-5 on pages 24-27 with examples from Northern Virginia Community College, the University of Delaware, and the University of California, Irvine.

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