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Office Hours with EAB

A new podcast from EAB experts to share ideas, insight, and inspiration with higher ed leaders.

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OFFICE HOURS
WITH EAB

Competing for Adult and Professional Enrollments

Five Critical Disciplines to Support Near-Term Growth

June 2, 2020

Audio Options

Refer to the Webinar Confirmation Email You Received in Your Inbox

Date Time: Jul 23, 2018 11:30 AM Eastern Time (US and Canada)

Join from a PC, Mac, iPad, iPhone or Android device:

Please click this URL to join. https://eab.zoom.us/j/477956446?tk=vt6BQ7-GGtjFFkf-Cv5w3gWr_WhS5K-viY_KTcb9uQE.DQEAAAAHH0JXhZsS3ITZWJ1VVNSMJRzY2FFMWxxZ1NBAA

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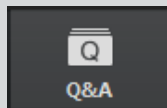
Using Your Computer Speakers

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To ask a question, use the Q&A panel on the toolbar.

Having trouble with Zoom? Contact us at EABCommunications@eab.com.

Today's Presenter



Carla Hickman

Vice President,
Research

CHickman@eab.com

Blueprint for Growth: Ongoing Research at EAB

5

*Our Fall 2019-Winter
2020 Research*

Sizing the Adult and Grad Ed Market

- Master's Degrees
- Credit and Noncredit Certificates
- Low-cost and Free Alternatives
- Adult Degree Completion

Today's Focus



Thriving in a New Normal

- Analyzing Potential Countercyclical Enrollment Growth
- Sizing Threat of National Competition
- Understanding Market Concentration

Coming Next from EAB



Maximizing Bottom-Line Impact

- Assessing the Revenue Opportunity
- Avoiding Profitless Growth
- Maximizing Program Margins
- Portfolio Diversification Strategy



Competitive Infrastructure

- Capabilities, Expertise, Investments Needed to Compete
- Agile Response to Shifting Consumer Behavior
- Market Leader Organizational Profiles



*The Master's
Market Slowdown*



*New Labor Market
and Regional
Economic Needs*



*Certificate
Strategies for an
Evolving Market*



*Program Margin
Calculators*

Strategy in the “Cone of Uncertainty”

The Importance of Acting Even When Data is Scarce

Entering Uncharted Waters



Must assume a break with past 5-10 years of trend data



Covid-19 first pandemic of its kind in over 100 years



Proxy and indicator data likely directionally correct, if not truly equivalent

Advantages of Being Bold in Uncertain Times



Pivot from focusing on what's been lost to new mission and margin opportunities



Capture market share early as a first mover



Opportunity to become a model for innovation in the sector



Five Critical Disciplines for Growth

Securing Share in Adult and Professional Education Markets

Organizational Design as Competitive Advantage

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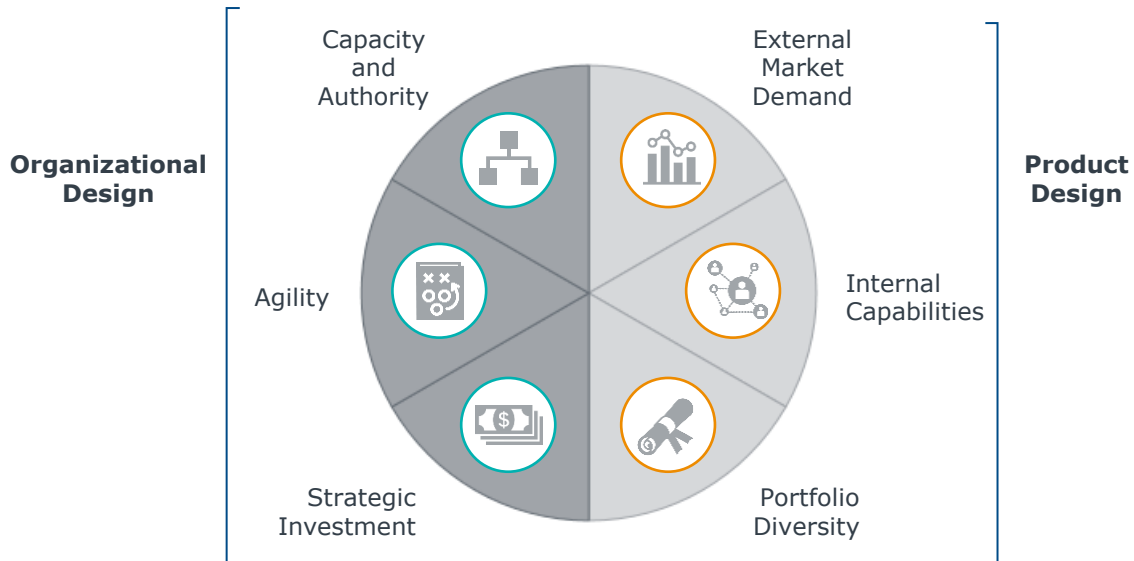
5

**Outcomes-
Based
Marketing
Messages**

Two Halves of a Whole



Designing for Competitive Advantage: A Holistic Approach to Growth Strategy



If You Build It, Will They Come?



9

New Market Pressures Cause Many Program Launches to Falter

“

“In today’s environment, it’s no longer ‘if you build it, they will come.’ Now, if you build it, and it is in demand, and you do a really good job marketing it, then *maybe* they will come.”

Michael Cottam,
AVP for Academic Affairs
Webster University

”

“

“Until recently, I would have told you that health sciences and business were ‘sure bets’ for enrollments, but I’m now seeing failures in those disciplines too. It’s concerning to me that these sure bets aren’t working out anymore.”

Raili Kieley,
AVP, Chief Planning and Budget Officer
Duquesne University

”

Many Campuses Experiencing “Profitless Growth”

10

New Programs Underperform, Become Long-Term Drains on Institution

Hard Lessons Learned in “Profitless Growth”

			
Lesson	Too many programs fail due to lack of validation	Strong enrollments do not equate with net revenue growth if costs too high	Longer-than-expected ramp up periods strain short-term finances
Example	Schuyler ¹ University launched new specialized master's in education without adequately evaluating demand data	Burr ¹ College neglected to account for new facilities costs of proposed science program prior to approval	Mulligan ¹ University expected new data science program to generate positive net tuition revenue by year 2
Result	Projected year 1 enrollments of 60 students; enrolled four students in first cohort	Program cancelled after accepting first cohort once leadership realized anticipated revenues would not cover needed facilities expenses	Program ultimately broke even in year 5; college dean struggled to accommodate 3 years of unexpected losses

1) Pseudonym.

Financial and Operational Toll of Missed Costs



Illustrative Examples of Unanticipated or Underestimated Costs of New Programs

	Janeway University¹	Ardmore College¹	Rockaway University¹	Granger University¹
<i>New Program</i>	Online master's in finance	Master's in data science	Signature MBA	Bachelor's in pharmaceutical sciences
<i>Missed Costs</i>	Marketing	Facilities	Student services	General education courses
<i>Impact</i>	Prospects enroll in competitor offerings with greater online visibility	Classroom space identified for program use lacks adequate tech infrastructure	Career advisors overwhelmed by increase in requests for services after enrollments hit 200 student target in year 4	New program enrollments exacerbate existing chemistry and physics course bottlenecks
<i>Result</i>	Program misses enrollment targets in year 1	Classrooms require expensive last-minute retrofits	Students frustrated by long wait times and bad decisions due to insufficient career guidance	Program leadership unexpectedly needs to add new sections and adjunct lecturers

1) Pseudonyms

One-Stop Shop for Academic Planning Support

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UFV's Program Development Office (PDO) Supports Faculty Through Proposal Process



- Established to help faculty navigate necessarily complex new program approval process
- Staffed by one full-time faculty member released from all teaching responsibilities for 1-2 years
- Provides independent third-party recommendations to improve proposals, but is removed from approval decisions

Sample PDO Functions

- Brainstorm program ideas with faculty
- Demystify policies, procedures, and regulations related to review and approval
- Edit program proposals
- Schedule approval meetings
- Track proposal through the review and approval process



"There were a lot of myths floating around campus about what faculty needed to provide to get new programs approved. We needed a single source of standardized information, a place where faculty could go to get the help they needed. We're that resource."

*Bruce Kirkley
Program Development and Quality Assurance Coordinator
University of the Fraser Valley*

Compendium of Program Planning Templates

13

Rev 9/0/12
Strategic Plan Implementation-Space Requirements

Please list the total number of additional positions in your department resulting from this strategic initiative and the general spatial needs for each classification. For the purposes of this questionnaire, individual spatial needs shall be defined by the following classification:

- Private Office- Type A
- Shared Office- Type B
- Private Workstation- Type C
- Shared Workstation- Type D
- Shared Workstation- Type E

Faculty/Staff Position	Quantity	Type of space needed

Support Space
Please list the total number of additional support space in your department and the general spatial needs for each classification. For the support space needs shall be defined by the following: for classification:

- Work room- Type F
- Supply room- Type G
- Conference room- Type H
- Lab/Computer Lab- Type I

Type of support space needed	Quantity	Can it be shared?

If Lab or Computer Lab space please answer the following:

- Type of Lab
- Lab any specialized equipment required
- Electrical needs beyond standard? Yes/No
- Clean port needs beyond standard? Yes/No

Does this additional space need to be near any existing space already?

Can these activities function in an off-campus location if space is not available?

INNOVATION FUND APPLICATION
Business Case Template



2.0 PROJECT CONTACT INFORMATION

Submitted by:	
Project Title:	
UFRV Project Sponsor (Dean/Provost/VP):	
UFRV Project Leader/Manager:	
Department/Division:	
Contact Name:	
Contact Number:	
Email Address:	

FORM 2: REQUEST FOR EXTRAORDINARY BUDGET REALLOCATIONS, 2012-13

To be completed separately for each activity/initiative (maximum of 4 proposals).

A. SUMMARY

Division (Faculty or Unit):	
Name/Title of Activity/Initiative:	
Existing Activity or New Initiative?	
Type: "existing" or "new" is space provided:	
Priority Ranking:	of (maximum of 4 proposals)
UFRV ID # (if applicable):	
UFRV ID # (if applicable):	

Is the request related to a budget reduction? (Indicate "yes" or "no") ☐

If yes, indicate the proposal # from the forms for the associated reduction(s) ☐

Description of activity/initiative:

THOMPSON RIVERS UNIVERSITY

Non-Curriculum Program Sustainability Worksheet

Proposed Initiative Name:	Project Management and Business Analysis Support
Primary Strategic Priority Alignment:	Sustainability
Service Area/Department/Unit/Name:	Enterprise Systems / Information Technology Services
Anticipated Start Date:	2013-2014
Institutional Contact:	Ashia Madani

Executive Summary

This request is so that IT Services can retain a Business Systems Analyst/Project Manager to continue to coordinate client communications and provide overall project portfolio management oversight for the Enterprise Systems Department and all IT Services Division.

The Enterprise Systems Department of IT Services at TRU is responsible for managing large systems projects and change initiatives. These efforts require skills directly related to communication, management, requirements gathering, and project management skills. Strong listening, people and problem solving skills are paramount for the success of this role.

Specific projects that this individual would oversee include the e-OL Module Pilot (new major project) and the Banner XE transition (three year project) but would also continue to support the 30-40 initiatives that the division completes each year.

The request is for 0.6 FTE equating to \$294,607 per annum.

Description of Initiative

Initiative

- This position will coordinate the project which is hoped will lead to Open Learning moving from Blackboard to Moodle as the LMS system for students, reducing TRU's dependence on one LMS. This project could potentially result in both increased student satisfaction, as students will no longer need to learn how to use two disparate systems, and in ongoing savings of over \$70,000 per year to TRU in licensing and support costs.

Page 1 of 8

OPERATION PLAN - BUSINESS CASE TEMPLATE

PREAMBLE

To obtain approval from the Leadership Team you must submit a business case proposal for each initiative requesting additional funding.

The proposal is an essential tool for leadership to evaluate an initiative, and to assist management in anticipating and planning expenditure priorities.

The merits of a plan at the four stages of development are as follows:

- Planning** - Sets out management's best estimate of the future in a logical and organized way, thus crystallizing ideas, highlighting potential problems, and identifying areas requiring further detailed consideration.
- Financing** - Assists in planning for and raising finance whether from government sources, partner capital, Institute funding, or BCT Foundation/Endowment sources.
- Implementation** - Provides management with guidelines for running the initiative efficiently.
- Monitoring** - Allows management to assess and control the actual progress of the initiative by comparison with the financial projections included in the plan.

Every plan is different, so, depending on the nature of the initiative and the purpose for which the plan is ultimately intended, not all the guidelines provided in the template may apply. Be sure to tailor your plan accordingly.

Confidentiality

If your plan needs to be treated confidentially please clearly indicate this on all pages.

Is the request related to a budget reduction? (Indicate "yes" or "no") ☐

If yes, indicate the proposal # from the forms for the associated reduction(s) ☐

Description of activity/initiative:

Is the request related to a budget reduction? (Indicate "yes" or "no") ☐

If yes, indicate the proposal # from the forms for the associated reduction(s) ☐

Description of activity/initiative:

Is the request related to a budget reduction? (Indicate "yes" or "no") ☐

If yes, indicate the proposal # from the forms for the associated reduction(s) ☐

Description of activity/initiative:

Partners may access full business case templates on eab.com.

Source: British Columbia Institute of Technology, Burnaby, BC; Ryerson University, Toronto, ON; Thompson Rivers University, Kamloops, BC; University of the Fraser Valley, Abbotsford, BC; University of North Carolina at Greensboro, Greensboro, NC; Business Affairs Forum interviews and analysis.

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Launch
Processes**

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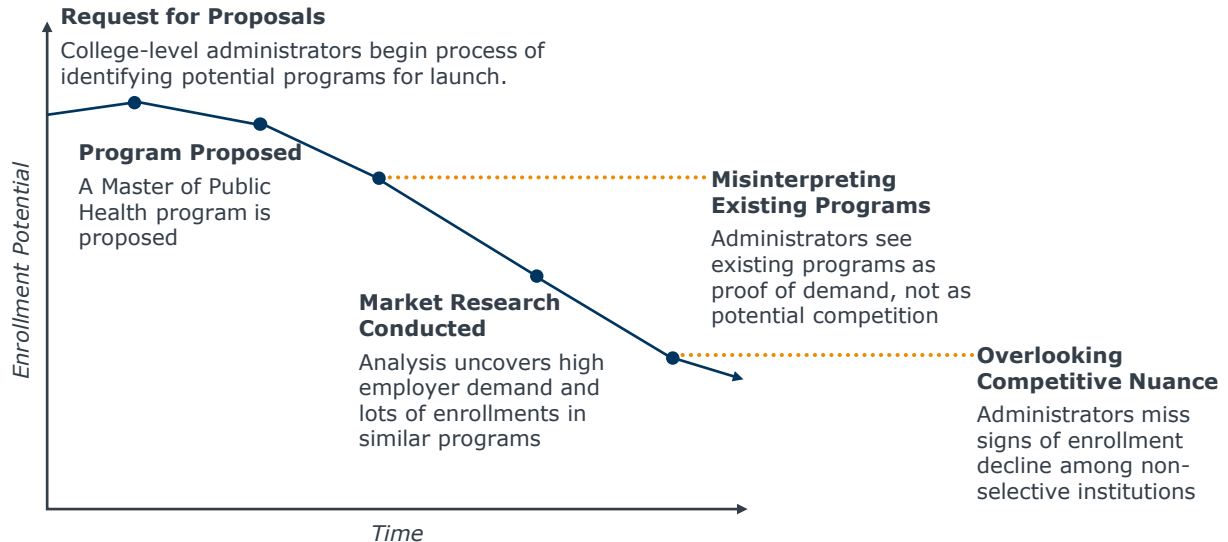
**Embedded
Sunset
Provisions**

5

**Outcomes-
Based
Marketing
Messages**

Peer Success Not Always Replicable

Danger Inherent in Taking a Fast Follower Development Approach



Seeking Answers to Difficult Demand Questions



Competition Driving Need for Sophisticated Understanding of Market Data

Evolution of Academic Leaders' Market Demand Questions



Status Quo

Is there labor market demand for this program in my region?

Advanced Practitioners

What secondary and tertiary markets should we consider?

What is the right format for this program?

Will this program help or hurt my current program portfolio?

How might student demand for the program change over time?



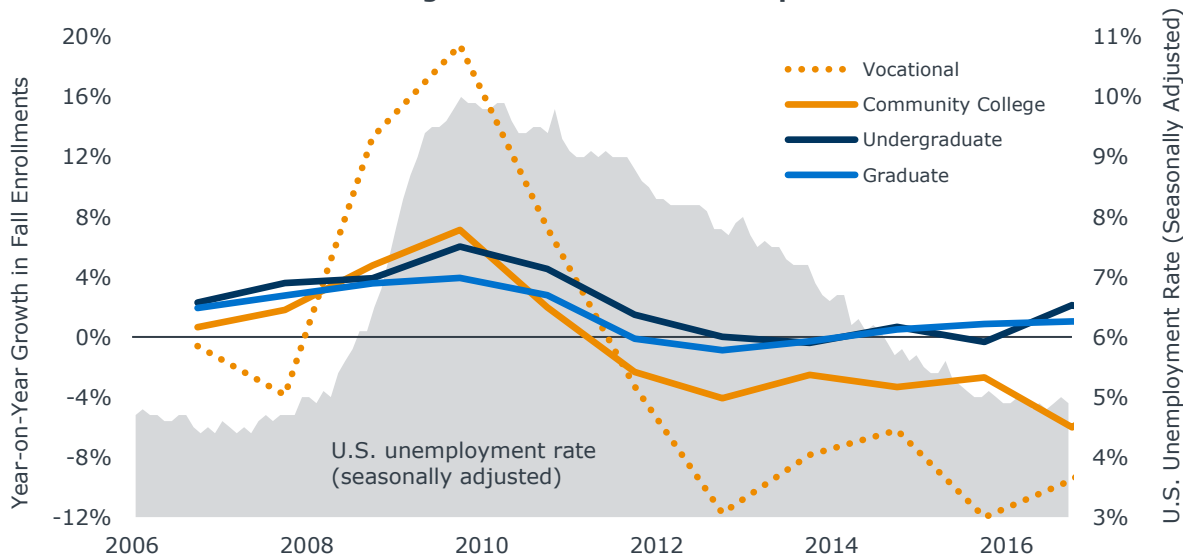
"We rushed into the market without doing the proper validation, and all four of the programs we launched in the last five years have not seen the desired enrollments."

*Continuing and Online Education Dean
Public Comprehensive University*

How Countercyclical are Grad Enrollments?

17

Grad Enrollment Increase During Last Recession Low Compared to Sub-Baccalaureate



Percentage point growth in enrollment during high unemployment:

Graduate

+2.3%

Undergraduate

+3.6%

Community College¹

+6.9%

Vocational²

+20.2%

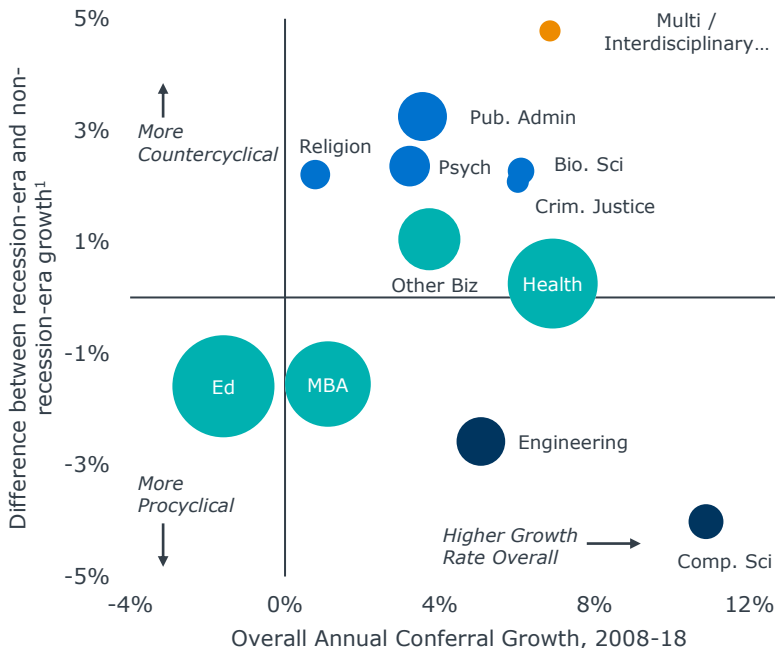
1) Includes all public 2-year institutions.

2) Includes all less-than-2-year institutions and all private nonprofit and for-profit 2-year institutions.

Countercyclical Boost Uneven Across Fields

Fields Best Positioned to Grow are Mostly Small, Few in STEM

Overall 10-year Growth Trend and Countercyclical Growth in Master's and Professional Doctorate Conferrals



The Multidisciplinary Moment?

Interdisciplinary grad degrees fast-growing and among most countercyclical

A Turn Toward Stable Careers

Growth in fields related to government and nonprofit jobs, but will these remain stable in current crisis?

No Boost for Big Fields

Education, MBA growth slowed. Almost no recession impact on health, non-MBA business.

Slowdown in STEM?

Engineering, computer science fast-growing overall but grew more slowly during 2008 recession

How is the Pandemic Reshaping Demand?



Our Early Analysis of Labor Markets across North America

Limited Shift in Industry Mix Across North America

Across all regions in the United States and Canada, job postings declined within all industries, with limited shifts in the share of jobs in each industry.

United States

Professional, technical, and scientific services increased its relative demand most significantly in the Midwest.

Canada

Health care and social assistance increased its relative demand most in Central and Atlantic Canada.

Increased Regional Demand for Business and Medical Skills



The South, Midwest, and Mountain West regions demonstrated greatest growth in demand for business skills.



The Northeast and Mid-Atlantic regions expressed greatest growth in demand for medical skills.



The Pacific West region experienced high growth in demand for both business and medical skills.

Decline in Job Postings Varies Throughout the United States

-13%

Decline in demand in the United States, nationally

-7%

Decline in demand in the Northeast

-23%

Decline in demand in the Midwest

Harnessing the Power of Regional Data

20

Regional Demand Profile: The Mid-Atlantic

Coronavirus Outbreak's Impacts on Employer Demand

A Job Postings Analysis and Discussion Guide

Created May 2020

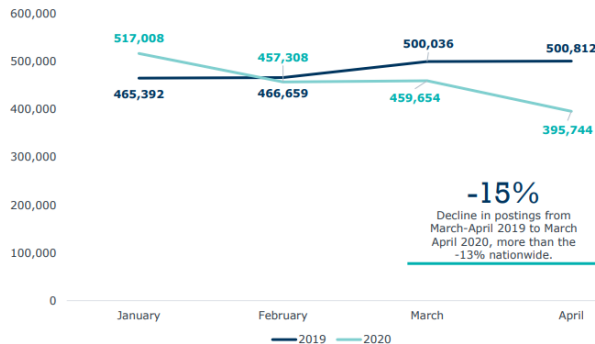
Early Market Analysis for Market-Responsive Program Development in Crisis

The first US COVID-19 case was reported in late February, and in mid-March state governments began issuing stay-at-home orders. Across this time, employers began freezing hiring, instituting furloughs, and laying off staff. While the total impact on our economy will take months to unfold, EAB is providing initial analyses of regional labor market data to inform program planning conversations.

Consider this early data in your portfolio planning conversations, as well as the recommended questions for discussion.

Changes in Job Postings Volume

Mid-Atlantic Regional Data, January-April 2019 and January-April 2020



Data and Analysis for Key Market Signals

- Examine six U.S. and four Canadian regions
- Questions to guide program development, redesign, and recruitment strategies
 - Elevate program discussions with information on industry and occupational mix, highly requested skills, top employers, and historical demand
- Incorporate data on career opportunities into recruitment messages
- Advise partnership decisions with top employers

Taking a Closer Look at High-Demand Fields

21

Clinical Health Care Analysis the First in a Series of Industry Reports Short-Term Declines in Hiring Reflect Complications of COVID Crisis

-9%

Decline in job postings for physician assistants from early 2019 to early 2020

-25%

Decline in job postings for physical therapists from early 2019 to early 2020

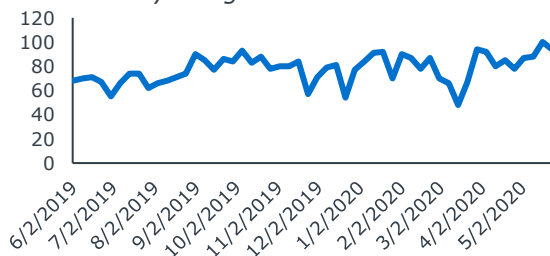
Licensure Delayed By Displacement of Clinical Rotations

"We won't be able to graduate individuals with associate degrees or baccalaureate degrees eligible for licensure. We'll be reducing the R.N. workforce."

*Scott Ziehm, Associate Dean,
University of San Francisco School of Nursing*

Future Demand Likely to Remain Strong as Economy Recovers

Interest over time in "nursing degree," as measured by Google search trends



48K

Annual increase in graduate-level clinical health degree conferrals, 2013-2018

Industry Analysis Coming Soon:

- Technology
- Business & management
- Manufacturing
- Education

Source: EAB Analysis of Emsi Data (Jan-Apr 2019 and Jan-Apr 2020); [Clinical Training for Nursing Students Sidelined](#), Inside Higher Ed; Google Trends; IPEDS

Five Critical Disciplines for Growth



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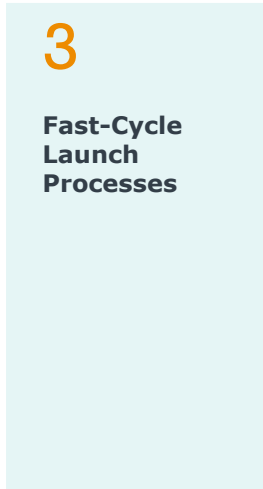
**Fast-Cycle
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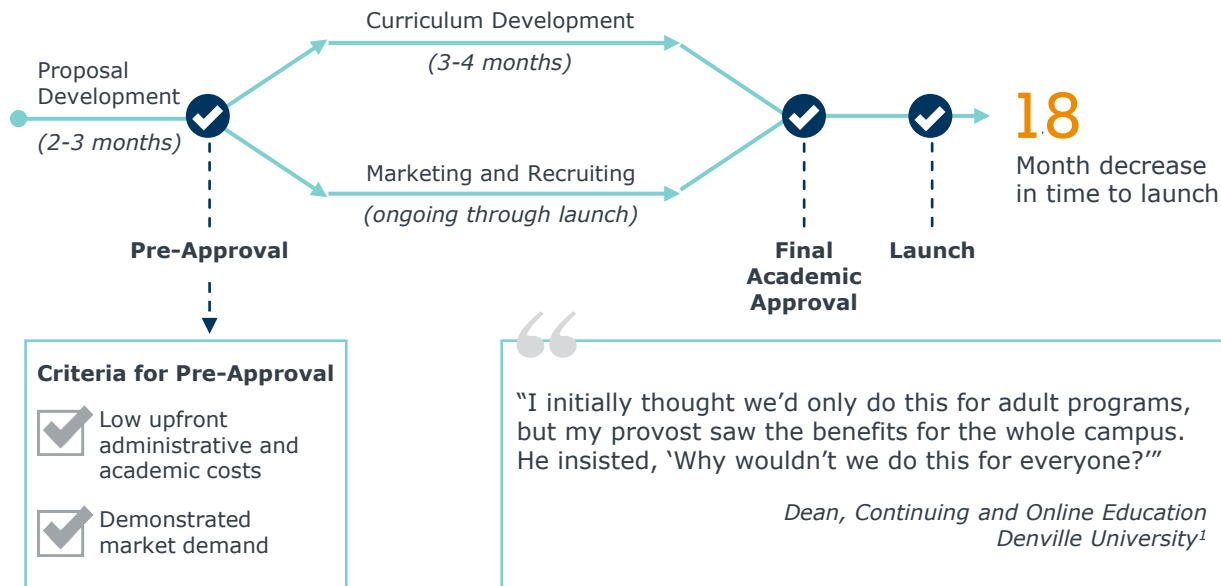
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**Outcomes-
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Creating a New Launch Express Lane

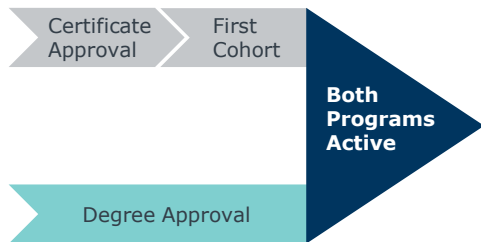
Denville University¹ Pre-Approval Process Expedites Time to Market



1) Pseudonym.

Additional Fast-Cycle Launch Processes

1 Parallel Processing Degree and Certificate Approval



- Certificate program requires fewer internal and external reviews, launches quickly
- Course reviews and student demographics from initial certificate cohort accelerate degree design and approval process
- Once certificate cohort finishes program, degree program ready to receive students

2 Just-in-Time Committee Convening

COE Organizational Benchmarking Survey

Degree Approval Speed	Committees Meet by Need, Not Calendar	Electronic or E-Mail Governance Voting	University faculty senate committee
1-5 months (n=10)	70%	40%	43%
6-11 months (n=29)	21%	7%	57%
1-2 years (n=44)	36%	11%	68%
3-5 years (n=18)	0%	0%	82%

- Leaders conduct ad hoc meetings to respond to new proposals as they arise—not solely reviewing proposals during regularly scheduled meetings
- Stakeholders circulate feedback and vote on proposals electronically if necessary to expedite ad hoc reviews

Trial Balloons Test New Market Opportunities

Use Nondegree Options to Assess Demand Before Full Investment

Northwestern

SCHOOL OF
PROFESSIONAL STUDIES

Test Course Process for Potential Certificate Programs

Identify Opportunity

Northwestern
faculty and leaders
propose new
certificate programs

Test Idea

Faculty create
courses in existing
degree programs to
test student
demand for
new certificates

Measure Results

Leaders measure
enrollments
across test courses
to prioritize
certificate launches

Select Results



High enrollment in
test course
prompted
development of
popular sports
analytics certificate



Low enrollment in
health analytics
course prevented
investment in
potentially low
return program

Building on Existing Program Success



Three Proven Tactics to Expand Enrollments

Tactic	Institution	Description	Sample Result
Expand Capacity	MARIST	Automatically increases operating budgets when programs exceed pre-determined student-faculty ratios	Accommodated demand for M.A. in Integrated Marketing Communication by investing in new faculty hiring; grew enrollments by 56%
Broaden Program Audience	 Northeastern University College of Professional Studies	Identifies programs with untapped growth potential and adds in-demand concentrations to broaden market appeal	Added new concentrations to professional master's program; drove 209% increase in program enrollment over three years
Create Add-On Certificates	Northwestern SCHOOL OF PROFESSIONAL STUDIES	Develops post-graduate certificates to capitalize on graduate student demand for additional skills training outside of degree program	Successfully launched six new data analytics certificates leveraging existing content from related degree program

Expanding Our Thinking on the Existing Curriculum

27

Fastest Chance for Growth Comes from What You Already Offer

Four Proven Strategies to Bolster Enrollments



Marketing Consultations

Require annual meetings between marketing and faculty leadership to diagnose and solve enrollment problems (e.g., low online application-to-enrollment conversion rate)

MARIST

Naming Benchmarks

Compare programs to competitors to identify and update out-of-date or unrecognizable program names

SIMMONS

Student Surveys

Survey current students to identify gaps in portfolio well-suited for future program launches



Web Audit

Update program websites to highlight student-centric content (e.g., career outcomes and value stories)

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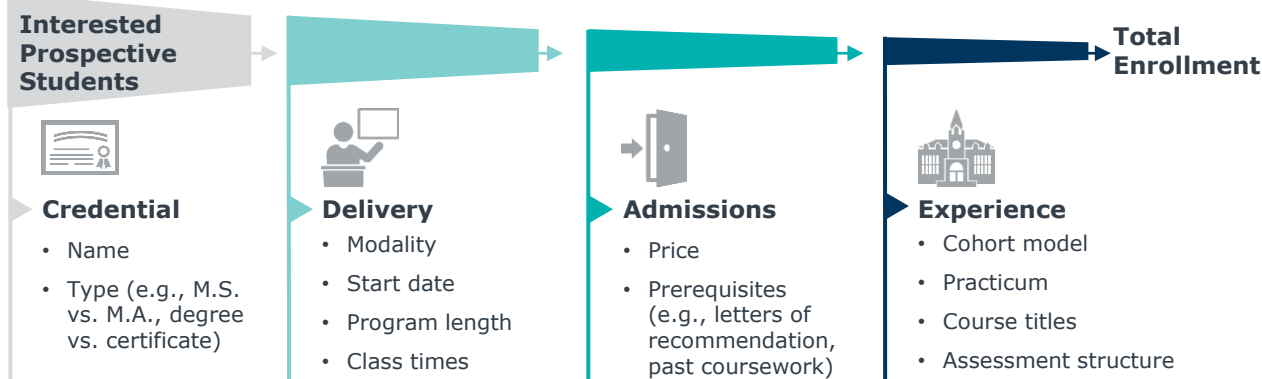
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**Outcomes-
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Messages**

Market Design Mismatches Undermine Performance

29

Representative Enrollment Decision-Making Process of Prospective Students



Sample Market-Design Misalignment

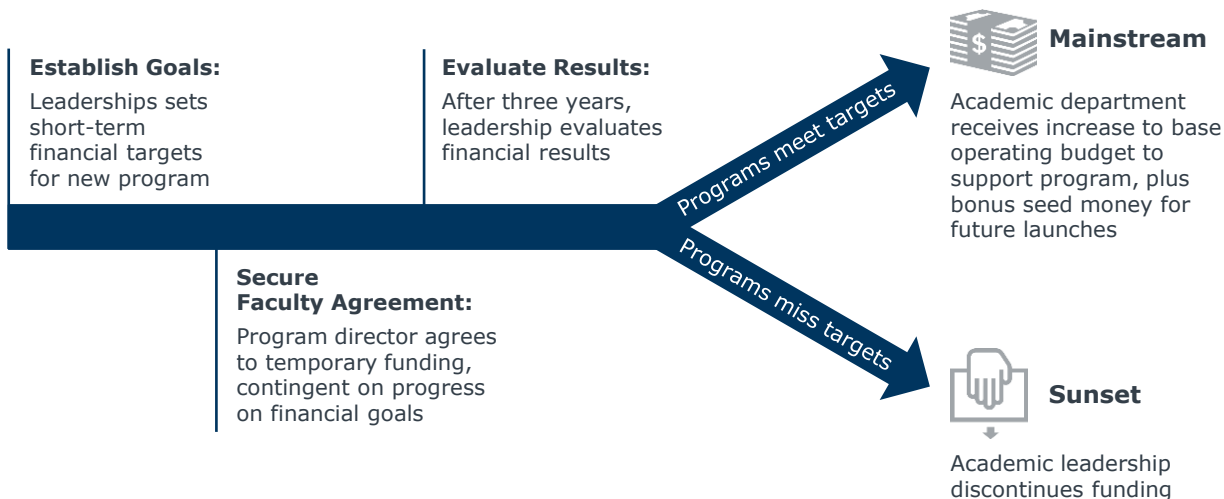
- | | | | |
|--|---|---|---|
| <ul style="list-style-type: none">❌ Institution launches degree program in response to labor demand, but target market seeks certificate program | <ul style="list-style-type: none">❌ Program launches in face-to-face format, but target audience comprised of working adults who wanted flexible online delivery option | <ul style="list-style-type: none">❌ Application requires two academic letters of recommendation, but working professional target audience deterred by lack of faculty network | <ul style="list-style-type: none">❌ Program has no experiential learning component, but prospective students seek hands-on opportunities to develop skills in new field |
|--|---|---|---|

Creating Upfront Sunset Provisions

American University's Policy Facilitates New Program Closures



Upfront Sunset Provision Process for New Programs



The Secret to Sunsetting Success



Clear Financial Targets Facilitate Buy-In and Enable Program Closures



Sample New Academic Program Budget Projections

Total Costs	\$377,208
Net Income/(Loss)	\$250,692
Income to Direct Expense Ratio	2.09
Anticipated Residual Return to School	\$125,346

Income/Expense Ratio

- Most new programs agree to 2:1 I/E¹ ratio targets
- Targets vary based on program type, location, and proportion of direct expenses
- Recurring failure to achieve expected I/E¹ ratio serves as grounds for potential program termination

Benefits of AU's Upfront Sunset Policy



Avoids underperforming programs becoming permanent budget drains



Achieves academic buy-in for program closure decisions



Motivates faculty to continually assess and improve programs

10%

of new market-driven programs sunset for weak financial performance

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**Outcomes-
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Competing for Mindshare and Attention

33

More Entities Competing for Mindshare...

1 Ad space demand outpacing supply

Cost of buying attention via paid media unscalable and unsustainable

20x

Increase in marketing technology companies from 2011-2015

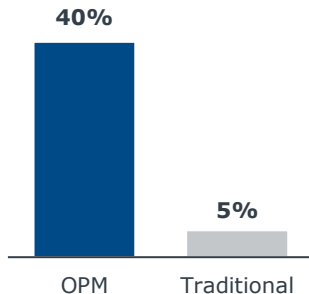
226%

Increase in graduate program cost-per-click from 2009-2014

2 Increasingly high standard for marketing spend

Traditional institutions competing with for-profits and OPMs¹ that invest significantly in marketing

Average new program's budget allocated to marketing



...and Students Paying Less Attention

3 Decreased attention span

Technological advances enable consumers to spend more time online, but they are increasingly more distracted

12 secs.

Average human attention span in 2000



8 secs.

Average human attention span in 2016

4 Increasing skepticism

Savvy consumers seek validation of investment from third parties

87%

of prospective students distrust institutional websites and seek external validation of program quality

1) Online Program Manager

Outcomes-Based Marketing Messages

Minor Ad Content Modifications Improve Recruitment of Uncertain Prospects



Status Quo: Product-First Marketing

- Ad copy emphasizes program features and skill goals
- Content marketing leads with academic capabilities



Strategic Modification

- ▶ Career- and life goal-centered content
- ▶ Career-first messaging



Ideal State: Student-Centric Marketing

- Ad copy makes emotional appeal to current life or career stage
- Ads offer useful non-program content for career-minded viewers



The Secret to Bootcamp Success

Most bootcamp providers aren't doing anything much more innovative than higher education. Their career support and other services aren't necessarily better. [...] All bootcamp providers do is use their marketing to speak in terms that their students understand: career change, advancement, and earning potential."

*Jonathan Lau
Founder, Switchup.org*

Selling a Program or Solving a Problem?



Appeal to Motivations and Desires of Larger Universe of Passive Prospects

Prospects Filter Out Transactional Ads

"Become a Cybersecurity Specialist"

Orchard University
Sponsored

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- ✗ Fails to communicate compelling value proposition
- ✗ Only appeals to prospects actively evaluating programs

Active and Inactive Prospects Engaged by Outcomes Data

"Make More Money in a Better Job"

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Cybersecurity and Information Assurance

\$36.76 / hour median earnings in your county

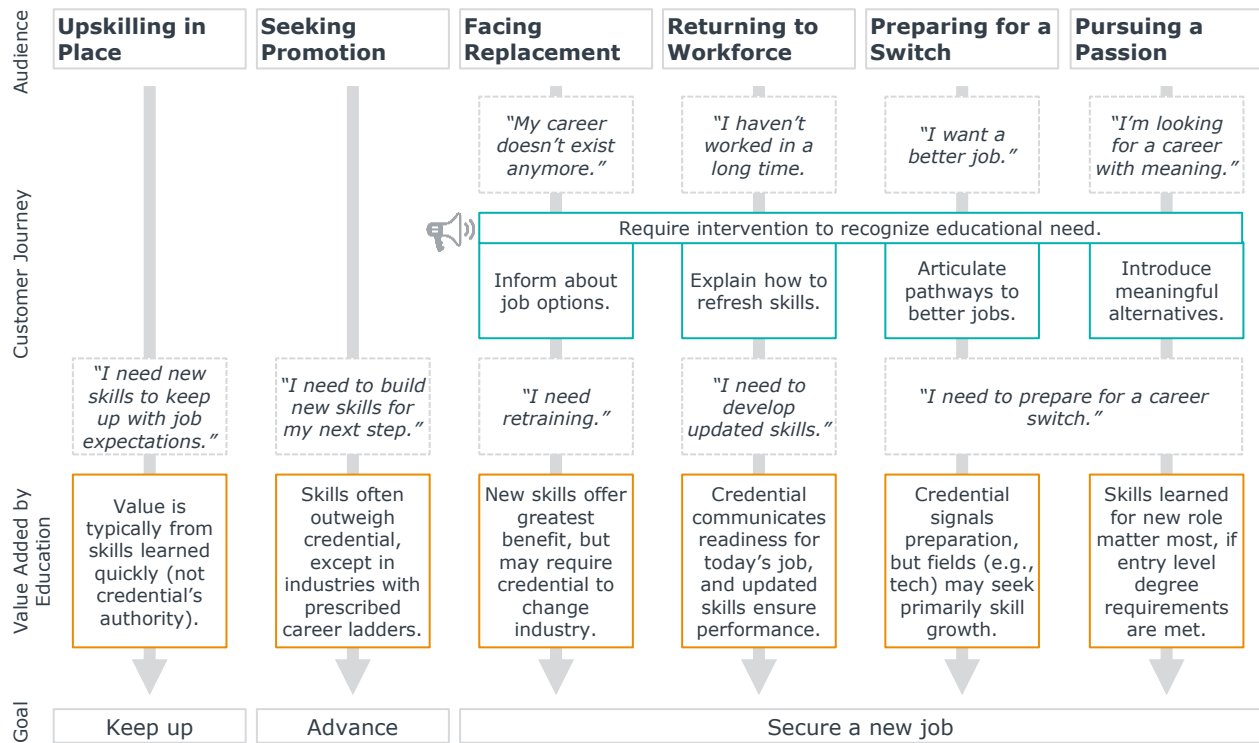
Learn More

- ✓ Leverages local demand data
- ✓ Attracts attention of prospects not actively searching for program

Getting Beyond “Working Professionals”

36

Complex Motivations and Inflection Points Influence Education Needs



Five Critical Disciplines for Growth

Securing Share in Adult and Professional Education Markets

Organizational Design as Competitive Advantage

1

**Rigorous
Program
Business
Planning**

2

**Market-
Informed
Program
Development**

3

**Fast-Cycle
Launch
Processes**

4

**Embedded
Sunset
Provisions**

5

**Outcomes-
Based
Marketing
Messages**

Harnessing the Power of Regional Data

38

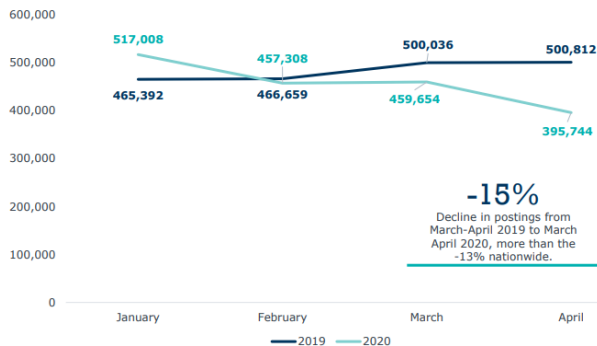
Reports on Coronavirus Outbreak's Impacts on Employer Demand

Data and Analysis for Key Market Signals

- Examine six U.S. and four Canadian regions
- Profiles industry and occupational mix, highly requested skills, top employers, and historical demand

Changes in Job Postings Volume

Mid-Atlantic Regional Data, January-April 2019 and January-April 2020



Inform Program Development and Redesign

- ✓ Elevate **program discussions** with information on regional labor demand
- ✓ Incorporate data on career opportunities into **recruitment messages**
- ✓ Advise **partnership decisions** with top employers



Immediately available upon request

Complete the exit survey



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