OpenEDU Marketing Strategy Model

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Marcom for Higher Education + Non-Profit + Brands on a Mission

Looking at
Strategy.

There are two types of people in this world: those who agree that strategy is hard—and damn liars… That's a joke for clients and conferences, but, all kidding aside, strategy work is hard. It's hard because it's risky. The process is riddled with unknowns: shifting market forces, paralyzing internal politics, unrealistic timelines and inadequate funding. And, like any risk, it needs to be managed. That's why we came up with the "OpenEDU Marketing Strategy Model."

Strategy is a plan of action designed to accomplish a goal. In our book, University X, we asked readers: Without strategy, how would anyone ever know when the work is done—or if it achieved its goal?

We argued that simple marketing strategies work best. They're inspired by achievable objectives and they're grounded by harsh realities: budget, time, audience, competition, brand flexibility, and differentiation. This is all still true. But there is a lot more to it. A strategic framework can guide you through important decisions, and generate a checklist of actionable items. This is based on a lot of legwork.

We read just about everything out there on strategy, branding and marketing. Then we interviewed other marketing firms. Then we tested and tweaked several strategic models over the decades.

The result is a thing of beauty: a nimble giant that synthesizes best practices. A Frankensteinian strategy model let loose upon the countryside.

The model organizes your thinking—and gives you the basis of a killer marketing plan. Yep, it's a two-fer.

Our OpenEDU Marketing Strategy Model is indeed "open." It's based on proven principles and innovative ideas from bright and talented marketers who preceded us. We're standing on the shoulders of giants and want you to enjoy the view. Stuff like this is—and should be—free because we're all trying to accomplish the same thing: educate.

We purposefully engineered this model to be as simple as possible. There's enough internal complexity within each module that it balances out. The important thing to remember is that "simple" does not mean "easy." It means clear, communicable, and succinct. We hope you agree!
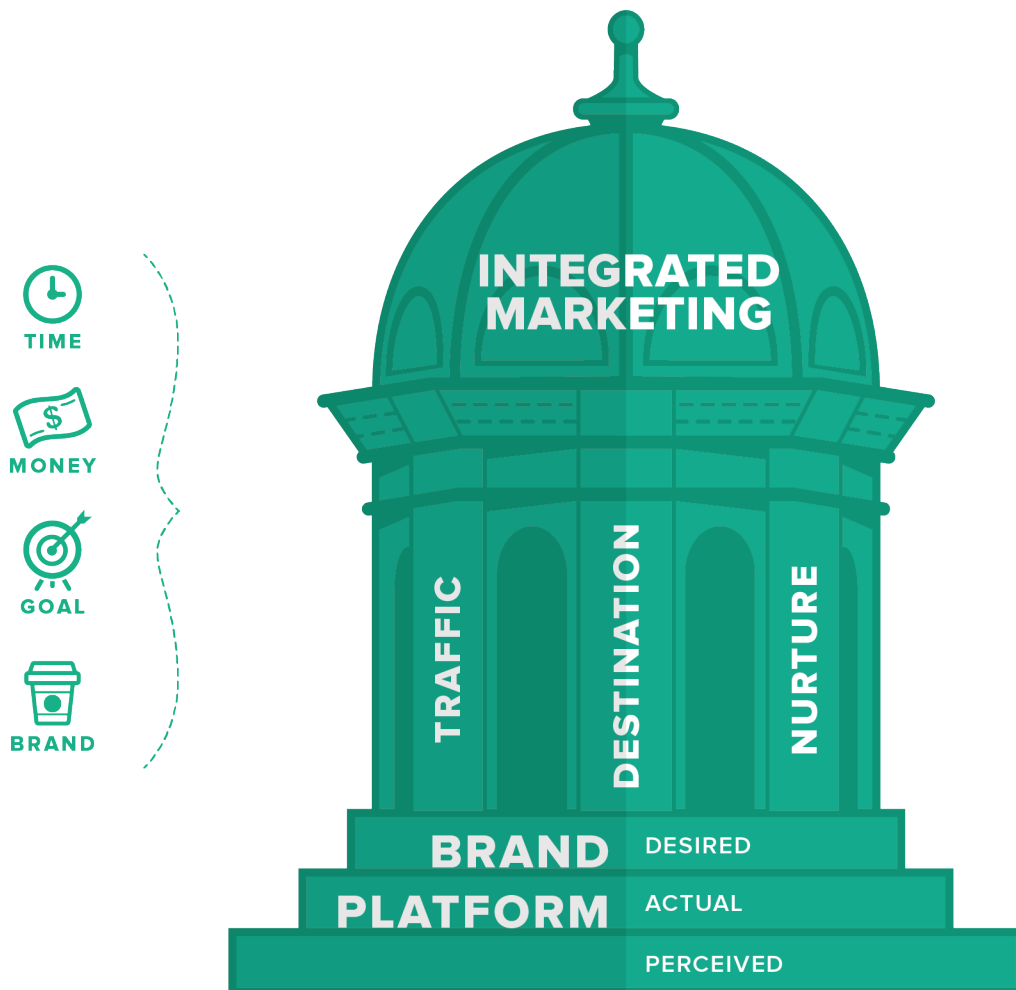
OpenEDU Marketing
Model.

The model has four inputs:

Budget – how much money has been allocated to set and execute the strategy?
Time – when does the strategy need to be implemented by?
Goal – what specifically are you trying to accomplish in the short term and in the long term?
Brand – what is the current brand platform? If you don't have one, get one.

These inputs inform the branding platform and the three strategic modules: generating traffic, creating a destination to collect leads, and nurturing the leads you generate.

The Model Inputs

Budget:
Ah, money. It makes the world turn—and it controls every other module in the model. For example, why spend the time (and money) engineering a regional branding campaign that includes expensive Out Of Home (OOH), Radio and Television tactics when the budget will never support it?

But let's call the expense what it really is: an investment. It helps leadership get into the right frame of mind to loosen their death grip on the purse strings. It also buys you patience and time, which is a requirement for all great investments to mature and pay significant returns. So, from here on out, we'll refer to expenses as investments.

Generally, you'll need to plan for two main investments: professional services and media. Professional services include research, strategy, creative, production, media buying, reporting, and ongoing support. Your media investments will cover the advertisement placements if your plan includes paid media. Not all plans include paid media, naturally. For example, your plan might include organic social media, search engine optimization, email marketing and grassroots outreach.

Media is often the biggest investment in a plan. Savvy partners will negotiate great media rates and added value on your behalf. Honest partners will never charge you a commission on the media they buy for you.

Budgets range across institutions. In the corporate world, marketing budgets should be about 5% of the company's gross revenue to retain their current market position. Companies looking to grow or gain market share budget 10% or more of gross revenue.

For-profit universities are playing at that level, but most colleges and universities can't afford it. Well-funded schools typically have yearly $3MM to $5MM in their marketing budgets, but most schools make magic with budgets ranging from $500K and to $1MM.

When your budget is limited, your best bet is to go digital, focus and to stagger your buys. Digital media is more economical, by and large, than traditional media. It allows you to hyper-target sophisticated segments, and it can drive more action than traditional media in the short-term.

Focus your marketing to promote specific programs that either perform well traditionally and have "infinite"

operational capacity, or focus on programs that are struggling—but don't spread your small investment too thin by marketing everything all at once.

Staggering is also a smart approach when you don't have a lot of dough to amass a significant showing. Stagger your media flights for every other day, every other week or create a solid block for three to four weeks leading up to some major milestone in your enrollment timeline.

Goal:

Logic insists that a goal should be set before we consider budget and time. But considerable time and money can be invested in developing high-level goals only to realize later that you don't have the resources to accomplish them.

Since this model is engineered to be realistic, we've sequenced "goal" after "budget" and "time" after "goal." We reason that if you're able to get the right budget to support a specific goal, then you'll also be able to negotiate the right amount of time.

Setting realistic goals that coincide with the budget and institutional priorities can be tricky. Your best bet is to keep your goals simple and explicit. For example, "increase awareness" is simple, but it is not explicit: Increase awareness among what audience? For what reason? Over what period of time? By how much? Measured by what metric?

Work hard to be clear and specific about what you are trying to accomplish. It will make it easy to decide what you keep and what you drop during the planning phase.

Be mindful of your audience. You will feel pressure to run expensive and potentially wasteful media just to appease people who are not necessarily the target audience (ahem... faculty, administration, trustees, etc). Unless these people are exactly the people the campaign needs for recruitment or brand awareness, fight a good fight and save your precious media money to target the right people.

Sometimes your goals can be serialized, and sometimes it makes the most sense to approach them in parallel. For example, a school might not be ready to promote a specific program but they want to lay down a brand platform for the larger institution. That clears the way for the subsequent program-specific marketing. For this example, the serialized goals could be:

•over a six-month period, increase local (define local) awareness by 15% among undergraduate prospects, measured by an awareness study, and then
•over the subsequent three-month period, increase qualified leads to a specific undergraduate program by 50%, measured by leads year-over-year during the corresponding period.

These are sequenced goals. Parallel goals have the same properties as sequenced goals, they just run concurrently.

One final thought on goals: make sure they are realistic, well articulated, adequately funded and properly timed.

Time:

Much like money, time is another investment. Generally, you have to plan for three timelines: research/planning, creative, and the media flight.

Depending on how much primary research you need to run, the research and planning phase can take anywhere from one to four months. Once research and planning is complete, you can start creative.

Creative can be fast or slow, since it is extremely subjective. The number of creative deliverables and the approval process (think branding, legal, legislative, technical, etc.) can also make the creative phase sluggish. We've found that the stronger the research, the easier it is to move through creative.

The other thing that helps move creative along is

a high degree of collaboration between the creative and business teams. Make sure the creative team writes a strong creative brief and points to a creative direction that's substantiated by the research. Then, check in every week. Ask to see moodboards, drafts and early copy. Give feedback and collaborate in good faith. The outcome will invariably be something you can all be proud of.

It might take two to four weeks to conceive, create and produce a straightforward display banner campaign for a single program—provided there is good research, available photography assets, and a minimal approval process. The creative for a comprehensive integrated advertising campaign that includes radio, billboard, display advertising, search engine marketing, social media marketing, email, and some OOH (bus shelter and bus-backs) could take anywhere from two to four months.

That's right, folks: doing good work takes time. At this point, from start to finish, you could have spent as long as eight months before you are able to run a campaign. Just for the sake of comparison, most of the campaigns we work on take between three to five months from the start of research to media flight.

Brand:

After you have time, budget and goal inputs ironed out, it's time to think about your brand. Most likely, you already are: most schools have, at some point or another, talked about their brand, sometimes *ad nauseum*.

Some might even have a brand model and a platform they feel good about. If that's you, then take the time to review your core brand attributes, extended brand attributes, brand position, differentiation strategy and differentiation protection strategy. If you don't have this information ready or current, then you are going to have to go through a branding process before you go any further… or suffer the consequences of mediocre performance and overall blandness.

Branding is not about altering reality; it's about

owning it. Needless to say, that's easier said than done. You can't fake it. First and foremost, your brand needs to align with the reality of your experience and the perceptions of your audiences. We're not talking about logos and typefaces. We're talking the overall experience.

Today, more than ever before, brands are collaborations. They're the sum total of the "official" story you express through your marketing and communications, combined with what your students and prospects are saying about you online. The key to great brands these days isn't to spin the truth or hide from the criticism, but to understand that your brand is formed by the combination of how you express it and how your target audiences perceive it.

It's important to find harmony between the three main dimensions:

•**Your Perceived Brand**: How people currently see your brand, whether correct or not;
•**Your Actual Brand:** Current logos and messaging. In many situations, this differs from the perceived brand simply because the strategy to accurately communicate the true attributes has been muddy and inconsistent; and
•**Your Desired Brand**: How you'd like your brand to be perceived moving forward.

Often, these don't align. For example, audiences may see your school as a low-cost alternative to your competition—with a lower-tier quality of education to match. In actuality, you may be more affordable, and your programs may be just as good—if not better—than the competition. But you desire to be considered a university that offers top-tier programs at a great value. To find alignment of all three perspectives, we suggest you work to SNAG your audiences: Surprise, Nurture, Action, Grasp.

Surprise
It's incredibly difficult to break through firmly held preconceptions, especially when they're formed by the ever-powerful "word of mouth." In order to blast through the prejudices, present a bold, truthful

image that challenges conventional wisdom. Show things how they really are, especially characteristics of your brand. These may be values that fly under the radar because you take them for granted. Nonetheless, they're an essential element of your institution's "DNA". What really jolts people into a new mindset? The surprising truths.

Nurture

When you encourage people to learn more about you, you're asking them to make a commitment. People don't like commitments, especially with brands. They'll be reluctant. Don't come on too strong. Guide and nurture your audiences through small nudges, well-timed assistance with logistics, and persuasive, useful content that allows them to see themselves as having made the decision on their own. Establish a content strategy that offers prospects information, entertainment, or advice that makes their lives better… and that also aligns with what your brand is all about.

Action

We all know that people are resistant to change. Most won't take action unless the outcome is assured and the benefit is obvious. Without a clear and present directive, people procrastinate. They choose inaction, even if the value is staring them in the face. To move your prospects from initial interest to action, you need to engage them first. Then present them with clear next steps to move them forward so they can achieve the outcome they really desire.

Grasp

It's tough for any of us to overcome long-held beliefs and patterns of behavior. We get it. But if you're going to move prospective students forward, you have to make it easy for them to acquire new behaviors and grab hold of new beliefs. Keep your messaging simple, respecting the time, demands, and attention of your audiences. Position it so that it appeals to their needs (not just what you want them to know). These are important ways to influence your target audiences and help them to grasp the value of your brand.

When it comes to branding, you have to understand your value to your customers and state it clearly. Only then are you in a position to SNAG them.

Ok, so, you've got your input: budget, time, goal, and brand. It's time to enter the model.

The
Model.

As you can see from the graphic at the beginning of this section, the model consists of a platform (brand), three pillars (traffic, destination, and nurture) and a roof (the strategy).

Everything you do and say needs to be informed by your brand platform. When it is, your roof (the strategy) is coordinated in message, feel and purpose—regardless of what tactics arise from your strategy.

The destination is a place where you send your traffic. As you think about timing the campaign, fight the urge to come out guns a'blazing with big media buys until your destination (e.g. your web site) is in tip-top shape. It's easy to feel pressure to meet immediate enrollment goals: you cannot wait for the perfect landing page to be built and plugged into the customer relationship management system. Sometimes, you just have to go! We've been there. While it's not ideal, not having prospects to nurture is worse.

If time is on your side, however, the best thing you can do is to focus on getting your destination ready. . . and then deal with generating traffic and nurturing the leads you generate.
Your destination could be a student center, a conference room in a hotel (i.e., a traveling open house), a program page, a landing page, or a homepage (although generally not the most leveraged place to send traffic). Design your destination in a way that supports your brand, message, and goal—and to set it up to drive action.

If your destination is a physical place, come

prepared with enough admissions or marketing representatives to effectively engage the traffic. Train these folks until your brand messaging is second nature, develop talking points, and craft the two or three "asks" that will advance the strategic plan. We've helped clients set up on-the-spot admissions interviews, "instant admit" events, and information sessions.

There is also a lot you can do to optimize your digital destination. We've done considerable research on this topic and devised the "Action Driven Design" model, a model that has been recognized by the American Marketing Association and The Education Advisory Board. The model has three basic tenants: **content**, **design** and **transaction**.

Content: Face it. People don't read much online. If you're lucky, they'll read a headline and a photo caption. You have an extremely small window to connect, engage, and drive action. Focused, simple, authentic, pithy and surprising copy that directly connects with the user has the best chance of being read.

In many campaigns, we employ more than 20 landing pages to effectively market to various audience segments. All in all, our landing pages are simple and concise. Calls to action are obvious, big, and clear. And, of course, all of the content on these landing pages is optimized accordingly to support the search engine optimization strategy.

Design: While there's an infinite range of

approaches when it comes to design, the ones that will drive the most action are: credibility design, aesthetic-usability effect, typography, chunking and hierarchy.

Transaction: Your copy can be perfect and your design fascinating, but if the interface is not usable, then you're dead in the water. Focus on these usability concepts to improve user transactions: progressive disclosure, affordance, conventions, error recovery, and "Date and then Marry."

After developing a destination that's going to help achieve your goals, focus on creating a campaign that nurtures leads through the process of applying, accepting, and enrolling. If the "destination's" job is to collect leads, then "nurture's" job is to convert those leads.

There is plenty of evidence that supports the obvious: the faster you get back to prospects, the better your chances for converting them. And so, the nurture campaign should have both timing and content considerations.

Don't just consider when and how often you are able to follow up with prospects. Know what you will say at each touch point. For example, a reasonable and simple nurture flow could look like this:

Week 0	Email or call within half hour of initial contact. Use "thank you for your interest" script/email.
Week 1	Email "You are on your way" email; ask for and collect snail mail
Week 2	Snail mail postcard
Week 3	Email invitation to "Info Session."
Week 4	Email "Value and Credibility" email
Week 5	Email "Application Deadline" email
Week 6	Email "Start your App Now for early Scholarship" email
Week 7	Call and use "Do you have questions?" script
Week 8	Email "Urgency" email
Week 9	Email "In the news" email
Week 10	Email "Urgency" email

Nurture flows can be crafted to include direct mail, email, and telephone calls. They can also be designed around seasons, application deadlines, etc. Make sure your lead-nurturing plan aligns with your branding platform and answers the questions your audiences care about the most. Each nurture email must have clear calls to action.

Finally, there's **traffic**. This is what you will spend the most amount of money on. The chart below gives you a couple of many traffic-generating strategies. Some are very expensive; some are not. The trick is to schedule these tactics around each other for maximum impact. For example, if you are running an outdoor campaign (and if you can swing it financially) consider also running banner and text ads with the same creative/message and call to action. The traditional media push will lower the click barrier, making the digital part of the traffic building campaign perform better.

If your plan includes media, make sure you think through the media outlet's restrictions or limitations with canceling or mid-run changes to the media flight. Most traditional media outlets such a TV, Radio, OOH, and Transit don't allow a lot (if any) flexibility to change the creative or the run. If that's the case, focus this part of the plan on brand awareness and messaging—as that's less

likely to need to change once the campaign is in full swing.

There are newer, by comparison, digital media options that have some of the mass-communication qualities of traditional media—but are infinitely more flexible. Digital radio, digital billboard and video pre-rolls, to name a few, allow better targeting and segmentation. They also let you increase, decrease, suspend or shift resources based on performance. Sometimes, it makes sense to use these digital tools, but not always. When you can, you get most of the value of traditional media, as well as digital media's flexibility, targeting and real-time performance (and the corresponding attribution).

An interesting use of digital mass media tactics is to engineer the campaign to do double duty: get the benefit of awareness building via mass marketing—and swap digital creative in and out in a moment's notice.

Have your creative drive action! Send prospects to an open house, promote your application deadlines, announce information sessions, etc. The point is to get your prospects to do something at the time they see your call to action. If your aim is driving leads, the sooner you do so, the better.

Traffic Generation Ideas	Description
Offer content relevant to your audiences and your institution.	It may be tempting to offer something that appeals to a wide range of people, but resist the urge. Don't drive raw traffic. Drive the right traffic. If you offer a piece of "exclusive" content that's not available anywhere else – a first-generation college student planning guide, a guide to becoming a physician assistant, an employment forecast for your region—you will drive attention and reinforce your brand.
Create scarcity.	Scarcity is an old marketing trick, but it works. Limit the time you're of-fering a scholarship and display a countdown timer on your site. Display the number of seats left in a program and decrease the count as students enroll. Show the number of tickets left for an open house and count down the time until it occurs. If the prospect senses scarcity, they're more likely to act.

Tap into networks.	Social media is really about person-to-person connections. It's an intimate medium (at least more intimate than the web) where people react poorly to unsolicited contacts. Mobilize your students and incentivize them to reach out through their social networks to invite people to participate in an "invitation only" online (or on-campus) experience.
Use electronic out-of-home and mobile to drive immediate connections.	Electronic billboards offer a unique opportunity to communicate with prospects in real time in order to urge them to connect with you. Try offering limited-time offers, possibly (if you're recruiting undergraduates) timed to the school schedules of the "feeder" high schools for your institution.
Partner with community organizations to increase visibility.	Think about it as "sponsorship on steroids." Go beyond just getting your logo on a banner and think about how you can work with community organizations, festival organizers, and others running "real life" events to create experiences that communicate your institutional differentiators and create opportunities for one-on-one interaction with prospects. It's often useful to "mine" the faculty for good ideas about these kinds of opportunities: they probably already have the connections you're looking for.
Create a branded event.	Check out the areas where you draw most of your students and see what kinds of "holes" exist in area events. Create an event that provides content and experiences people aren't getting. Then use the event to promote your institution and connect with prospects. Speaker series', music festivals, and art/design contests are good examples of the kinds of events that lend themselves well to becoming "branded" events.
Use retargeting and context-aware online advertising to "piggyback" on other events/seasons/interests.	One way to extend your creative is to make it seasonal or timely. This allows you to "piggyback" on awareness that's already out there and provides new opportunities to connecting with prospects. And while online retailers are often heavy users of this technique, there's no reason that you can't use what people are searching on or reading as the basis for modifying your creative, provided that you're still targeting the right prospects.

Implementing the OpenEDU
Marketing Strategy Model

We hope that this article has inspired you to think about systematic ways that you can approach your recruitment marketing. Too often in higher education it seems that it becomes easy to get lost in a sea of subjectivity on the way to consensus. Then decisions are made based on who speaks the loudest rather than what's going to work best.

Applying a framework like the OpenEDU model to your admissions and communications planning allows everyone to focus on defining what you're trying to accomplish, test strategies for accomplishing those goals, and analyze the results in an objective way. Then you can fine-tune your approach. It also helps spark creativity because everyone knows the parameters for brainstorming new approaches. Best of all, using the OpenEDU approach ensures that your efforts are grounded on the principles of your brand; focused on attracting, converting, and nurturing leads; and guided by a comprehensive strategy focused on specific, measurable, and actionable goals.

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