

STAMATS
Higher Ed. Smarter.

Fundamentals of Integrated Marketing Communication

HighEdWeb Integrated Marketing Academy

presented by

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October 2016

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About Stamats

Stamats is recognized and respected as the nation's higher education integrated-marketing thought leader. Our comprehensive array of innovative services has set the standard for pairing insightful, research-based strategic counsel with compelling creative solutions. We promise our clients the highest level of professional service and attention to detail in the industry because, in the end, we know our success is measured entirely by theirs.



Research, Planning, and Consulting

- Brand clarification and development
- Image and perception studies
- Recruiting and marketing assessments, plans, and counsel
- Tuition pricing elasticity and brand value studies

Strategic Creative

- Institutional, admission, and advancement websites
- Mobile and social media solutions
- Recruiting and advancement campaigns and publications
- Virtual and experiential tours
- Full-media advertising campaigns

Stamats on Your Campus

- Stamats has a wide array of presentations and workshops that we conduct on campus for departments, senior leadership teams, and boards
- A partial list of sessions includes:
 - Developing a Compelling Institutional Vision
 - Creating Sustainable Competitive Advantage
 - What Lies Ahead – a Review of Major Trends and Issues
 - Building a Brand That Matters
 - Strategies to Increase the Marketability of Your Academic Programs
 - Developing a Competitive Advantage
- Please contact me for a complete list of sessions, or to discuss a session for you in greater detail. Thank you, Bob (bob.sevier@stamats.com)



Remember:

- “Planning is the organization of hope”—Blum
- A marketing plan is a formalized marketing attitude
- “I would rather go into battle with a good plan today than wait for a perfect plan tomorrow”—Patton
- More than anything, marketing is an issue of institutional will



What Do You Hope to Learn from this Session?

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What is the Difference Between Promotion and Communication?

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What Is a Communication Plan? How Different From a Recruiting Plan?

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A New Definition of Strategy

The purpose of strategy is to
differentiate your institution from your
competitors in ways that target
audiences value

- Differentiation
- Competitors
- Target what audiences value

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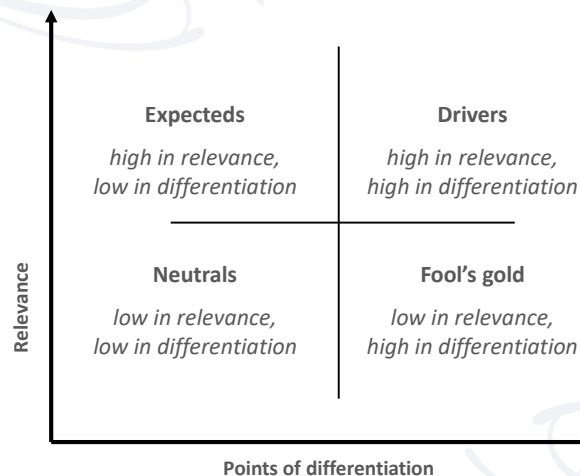
Differentiation

- How many of you have high academic quality and are friendly, caring, and supportive?
- When you describe yourself the same way as your competitors, you become a commodity:
 - Price
 - Convenience
- Differentiation involves being different from your competitors in one or more ways that your target audiences value
- Typically, differentiate on one or more of the four Ps (more on this in a minute)



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Seek Points of Differentiation



Source: McKinseyQuarterly.com

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Who Are Your Competitors?

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Competitors

- With whom do you truly compete for prospective students?
 - And other resources: media attention, donated dollars, etc.
- Generally, three types of competitors:
 - Win from (not really your competitors, you beat them up)
 - Lose to (not really your competitors, they beat you up)
 - Split 50/50
- In most cases, you will have your best chance to improve share against the third group: split 50/50
- Try to limit your competitors to five



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Competitor Research

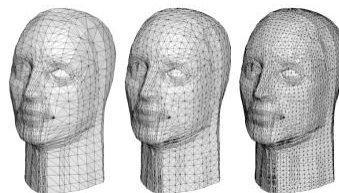
- Secret shopper
- Compare programs
- Compare support structures
- Compare cost
- Compare financial aid strategies
- Compare completion rates

Your goal is not to be more like your competitors, but different from them in ways students find compelling

Where they zig, you need to zag

Target What Audiences Value

- Based on research, do you understand:
 - What your students seek?
 - Their fears about going (or going back) to college?
 - What motivates?
 - The outcomes they envision?



Get inside their heads!



**Unique? Distinctive?
Compelling?**



**Institutional-Centric
vs.
Audience-Centric**

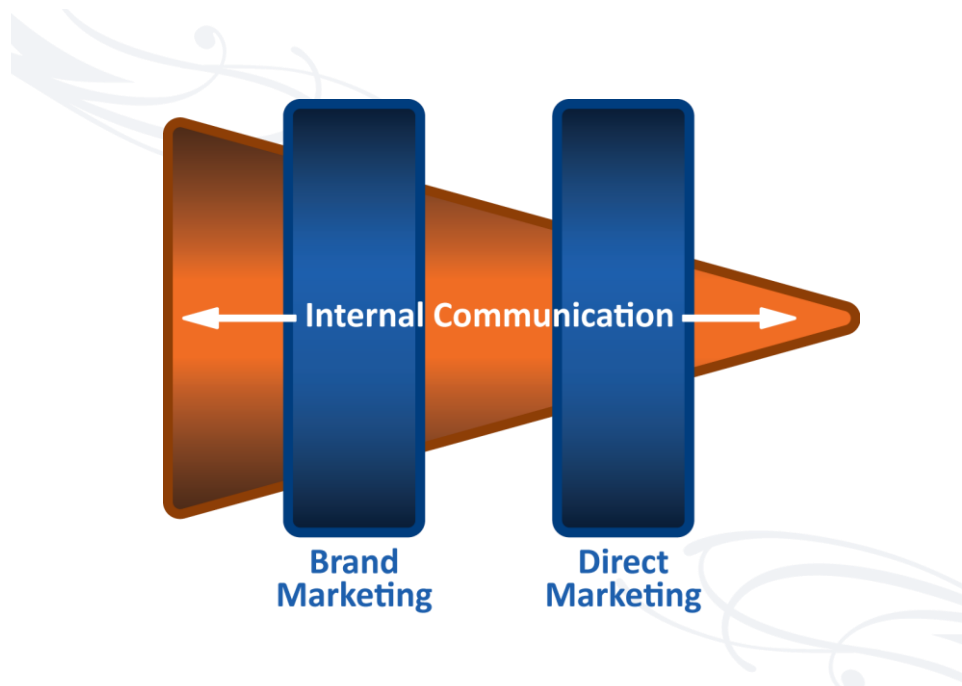
What Is the Difference Between a Distinctive Competency and a Competitive Advantage?

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Integrated Marketing Communication

Why is integration so critical?

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Brand Marketing



- A brand is not a look
- Rather, a brand is a valued and differentiating promise a college, university, or school makes to its most important audiences to meet a need or fulfill an expectation
- Perry Forster: “A brand is a promise expressed as a benefit that your target audiences value”
- Al Ries and Laura Ries remind us that the purpose of marketing is to build a brand in the mind of a prospect
- Truly successful brands are perceived by the target audience as the best, or even only, solution to a particular need
- Brands give permission



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Direct Marketing (DM)



- Designed to generate a response
 - Sometimes called direct response marketing
- Primary direct marketers:
 - Admissions – want to visit, apply, attend?
 - Advancement – want to give?
- Historic DM channels:
 - Telephone
 - Postal mail
- Emergent DM channels:
 - Email
 - Text messaging
 - IM
 - Blogging (and all its permutations)
 - RSS feeds
 - Social networks (social media)

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Internal Communication

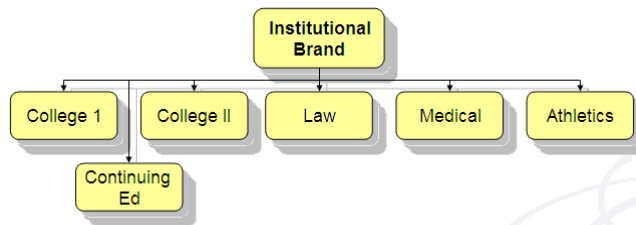


- Keeping internal audiences informed about:
 - The day-to-day
 - Progress toward achieving your vision
- Most faculty and staff actually feel overwhelmed by the information they receive
 - Prefer fewer channels but remaining channels used more robustly
- An important step: Write a mission statement for each vehicle/channel so people understand what kind of information will be found where (and when)

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Brand Architecture

- A way of viewing and organizing your institutional (super) and sub-brands, attributes, and graphic identity so as to achieve greater clarity, synergy, and leverage
 - Branded house or house of brands
- A clear brand architecture is especially critical as brand contexts become more complex with multiple sub-brands and product offerings



Source: Aaker, modified

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Architecture – continued

- “House of brands”



- “Branded house”



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Why Deans/Directors Do Their Own Thing

- Have a tradition of acting unilaterally
- Tired of waiting for the “central” administration
- Feel that their program is unique, special, or different
- Access to their own funds/staff
- Just don’t like the look that the university is using
- Feel that the university brand does not tell their story
- Have a separate advisory board and a member offered to help them develop a brand
- A colleague at another school developed her own brand
- T2 (turf and testosterone)

Determining Sub-brands

- Sub-brands must act in concert with the super brands
- They cannot act unilaterally
- In almost all cases, sub-brands drawn resources away from the super brand
- You might consider a sub-brand if:
 - Distinctive market presence
 - Not obviously tied to the larger super brand
 - Serve separate target audiences or target geographies
 - Sub-brand has a different and valued USP
 - Others?

The Four Ps

- # 1: Product
 - What is your product?
 - How does your product compare/compete with similar products from other colleges or universities?
 - Is your product in demand? How do you know?
 - Will students and donors overcome real and imagined barriers to exchange their values (time and money) for your product?

Q

What kinds of educational institutions tend to be more willing to customize their products? Why?

A Differentiated Curriculum Is Your Most Important Asset

Develop a Business Approach to New Majors

- Four major decision areas
 - Strategic
 - Marketplace
 - Economic and resource
 - Promotion

- Create a constellation of potential programs and then choose

Strategic

- How will this program advance our mission, vision, and strategic plan?
- Do we have a faculty champion who will live and breathe this program?
- Does this champion have the time, talent, and political acumen to pull this off?
- Are other faculty groups and departments supportive of this new program?
- What detractors are in place? What are their concerns? Can they be assuaged? Can they be brought on board?
- Will the resources for this program draw resources away from other critical areas?
- What opportunities will we have to set aside to fund this new program?

Strategic - continued

- What is our rationale for offering this program? Is it solely economic?
- Is this program going to be a truly high-quality program or will it be marginalized because of scarce resources?
- What chances for collaboration with other organizations does this new program offer?
- Will beginning this program allow us to cut another program?
- Will this program lead to higher-paying jobs, and thereby reduce the negative impact of cost and college debt?
- Will this program generate true excitement on campus and in the marketplace?
- In five years, will this program be a rising star or a problem child?

Marketplace

- Could this be a signature program that attracts regional or even national attention?
- Is this program distinctive, or are similar programs offered by competitors?
- If this program is not distinctive, can we offer it in distinctive ways (aggressive internships, collaborations with other schools)?
- Will this program survive the Internet commoditization of programs?
- Have we tested this idea with:
 - Influencers?
 - Prospective students (and even parents)?
 - Employers?
- What absolutely solid, external data do we have that indicates this program is/will be a winner?

Economic and Resource

- Can we offer this program less expensively than our competitors? Will we have a price advantage?
- Will the institution provide venture capital for this new program or must it pay off immediately?
- Have we developed a pay-off schedule for this new program (when revenue surpasses real and indirect costs)? Is this schedule reasonable?
- Does the budget include reinvesting into the program to make it better?
- Do we have capacity for this program? Do we have enough capacity if this program is successful?

Economic and Resource - *continued*

- When we calculated the costs of this program, did we include:
 - Promotion?
 - Staffing?
 - Renovation?
 - Equipment and supplies?
 - Scholarships?
 - Contribution to overhead?
- Have we developed a model whereby revenue is shared with the sponsoring department, thereby fostering a sense of reward and innovation among faculty?
- Will we have special, and long-term, financial aid resources for this new program?
- Are there immediate fundraising opportunities for the new program?

Promotion

- Is a list of prospective students available? Is this list compiled or response?
 - GMATs, et al.
- Will we use a segmented marketing campaign to support this new program?
 - Direct mail
 - Web
 - Advertising
 - Telemarketing
 - Outreach
- Have we developed an adequate, sustainable promotion strategy?
- Will this program attract media and public attention?

Four Ps - *continued*

- # 2: Price
 - How much do you charge for your product?
 - Do all customers pay the same price?
 - How does this price compare with that of competing colleges or universities?
 - What are the \$ and non-\$ costs of your product?

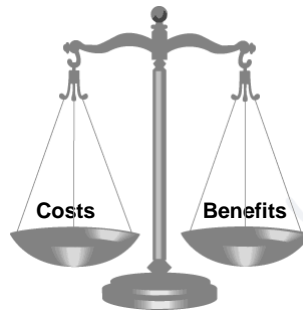
Q

What are the dangers of positioning yourself on the \$ variable?

Four Ps - continued

- Generally, you can't do much to lower cost, but you can do a great deal to enhance the reality and perception of benefits

The relationship between costs and benefits is called value.



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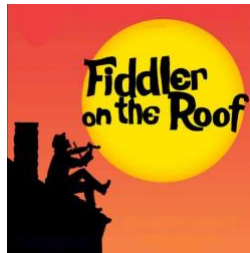
The Language of Cost

- The following terms are not synonyms/synonymous:
 - Cost
 - Value
 - Affordability

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The Voice of Cost

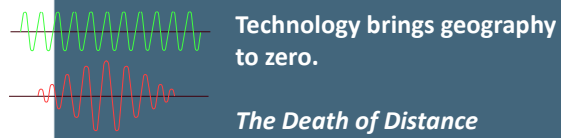
- Who sends the message is often more important than the message itself
- The voices of your students and graduates is much more persuasive than your voice
- Create content or curate content



What Are Some Signs of Price Sensitivity?

Four Ps - continued

- # 3: Place (distribution)
 - Where are your programs offered?
 - Are people willing to take classes in those places and at those times?
 - What alternative delivery modes are available?



Technology brings geography to zero.

The Death of Distance

Four Ps - continued

- # 4: Promotion
 - To what media are your audiences most likely to respond?
 - How do your promotional strategies compare with those used by your competition?



The Four Cs

- Customer (or consumer)
 - Not the product, but the customer; you can no longer simply sell what you want to produce, you must sell what customers want to buy
 - Within constraints of mission
- Cost
 - The dollar and non-dollar costs the customer is willing to “pay” to meet a need or want
- Convenience
 - Not place, but issues of “easiness” and access
- Communication
 - Not merely promotion, but active listening and message customization

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Chief Attributes of the Four Cs

- More customer influence
 - *Caveat emptor to cave emptorum*
- Recognizes that the exchange relationship is dynamic and increasingly dependent upon knowing the customer
 - Aggressive listening...and remembering

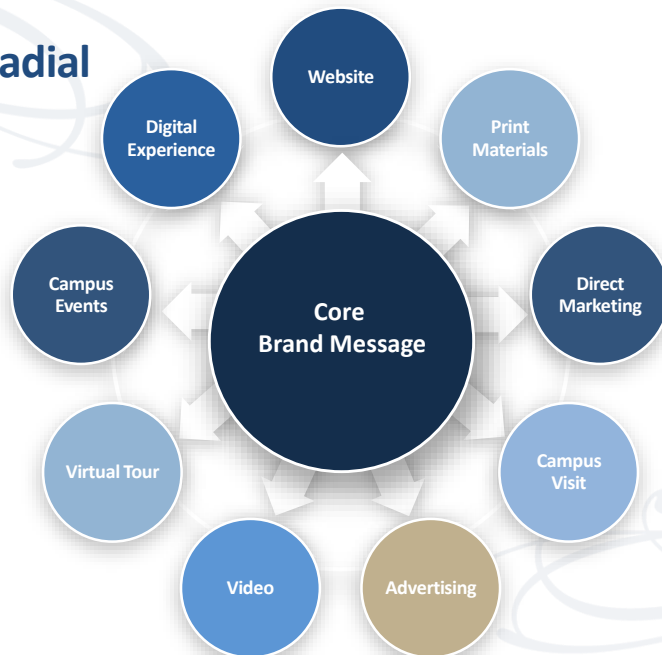


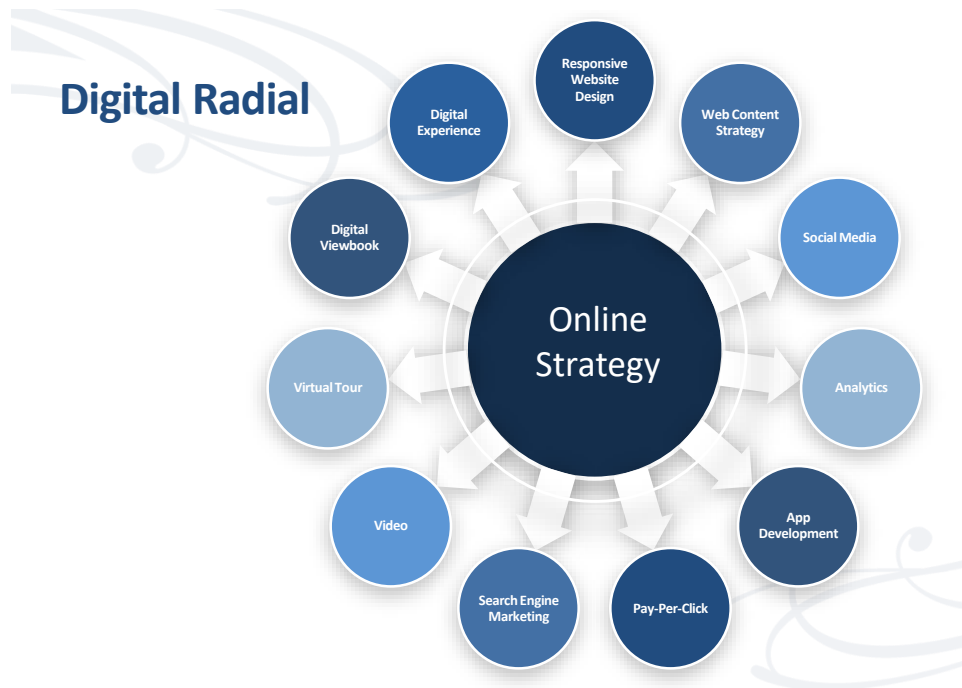
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Media Mix

- Mass and personal channels of communication and promotion
- Many components of the media mix such as advertising, public relations, publications, and direct mail are often called “marketing” by the uninitiated

Channel Radial





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Are the Four Ps or Cs of Equal Value?

Marketing Communication Plan Outline

- Mission statement
- Vision statement
- Planning assumptions
- Situational analysis (prioritized)
 - SWOT
 - OT
- Prioritized target audiences
- Vivid descriptors
 - Brand attributes
- Target geographies
- Prioritized marketing goals
 - Integrated Marketing Communication (IMC)
 - Brand
 - Direct
 - Internal
- Marketing action plans (MAPs)
 - Short term
 - Long term
- Budgets
- Timelines/GANTT charts

The Final Written Plan

- While your final plan can take a variety of shapes and forms, this general outline will work in most instances:
 - Mission 1 page
 - Vision ½ page
 - Planning assumptions 1 page
 - Situational analysis (prioritized) 3 pages
 - Prioritized target audiences ½ page
 - Vivid descriptors ½ page
 - Target geographies ½ page
 - Prioritized marketing/communication goals 1 page
 - Action plans for year one 15–20 pages
 - Budget 1–2 pages
 - Timeline 1–2 pages

More Than Dollars...Will

- Many college administrators believe that the biggest requirement for a successful brand marketing strategy is cash
- While you will spend dollars, there is another currency that is even more important than dollars: institutional will
- For a brand marketing strategy to be successful, you must have the institutional will to conduct the research and respond strategically
- A critical element of brand marketing, therefore, is the decision to focus outward rather than inward, the decision to first understand and then respond to customers
- One final word about dollars: you will spend dollars to create and maintain a brand
 - More than new dollars, you will spend coordinated dollars: dollars already being spent, now coordinated—and maximized—under one overarching brand marketing strategy

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People and Groups

- **The champion:** the spark or true believer (the visionary)
- **The sponsor:** runs interference for the champion
- **The large steering committee or taskforce:** the politically appointed planning team; largely ineffectual as a true planning body
 - Transition to advisory group status
- **The planning team:** the champion and the team who actually do the heavy lifting
 - Involved with both developing and implementing the brand



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The President/Dean as Sponsor

- The president/dean is the chief marketing officer. The signals he/she sends—to senior staff, middle managers, and faculty—will telegraph whether marketing is a legitimate institutional commitment
- As such, the president/dean must:
 - Have a vision for how marketing can help the institution. Without this personal vision, there will never be personal commitment
 - Commit his or her power and prestige to the marketing efforts
 - Commit institutional time, talent, and treasure
 - Make tough decisions in a timely fashion
 - Provide authority to the chief marketing officer, department, and/or team
 - Convey that marketing is an institution-wide commitment and responsibility
 - Clear away organizational and policy roadblocks
 - Insist on shared goals and resources among senior administrators/staffs
 - Go toe-to-toe with recalcitrant administrators, administrators who adopt a wait-and-see attitude, and administrators who are hostile to the idea of marketing
 - Demand departmental and even individual accountability
 - Be the champion's sponsor

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College/School Involvement

- Key issues:
 - If your plan involves the public declaration of previously settled core values, then there is less need for college/school engagement
 - If your plan involves the clarification of core values, then there will be a greater need for engagement

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Key Steps in Engagement

- Help the community understand the process
- Clarify their role in the process
- Build their confidence in the process (solid, defensible research)
- Give the community access to the process
- Clarify the role of community members in executing the plan
- Aggressively communicate outcomes

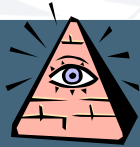
Developing an IMC Plan

- We are now going to walk through the steps for developing an integrated marketing communication plan
- I have included a number of worksheets that will make your planning more effective



Step One: Lay the Foundation

1. Clarify your purpose
 - Ask the big questions
 - Finalize the marketing mandate
2. Designate a champion
3. Assemble and build the marketing team
4. Deal with the "sync" issue



The Big Questions

- Why an integrated marketing plan and why now (to what need/opportunity are you responding)?
- Is the need/opportunity widely recognized on campus? In your college or school?
- How are you defining marketing? IM, IMC, brand marketing, promo?
- Are major players defining marketing the same way?
- Who are your customers? How do your customers define value?
- Who are your real competitors for students, donated dollars, and public attention?
- Will this plan dovetail with other plans or supplant them?
- How will you fund your plan?
- How will you determine whether your plan was successful (how evaluated)?

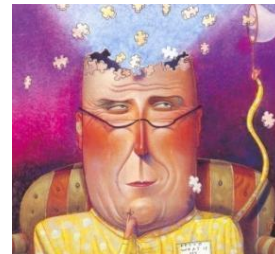
IM, IMC, or Just Promotion?



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Finalize the Marketing Mandate

- At this point you must completely understand the president/dean's marketing mandate (what he or she hopes to see the plan accomplish)
- If you do not have a clear understanding of the mandate, it will be very difficult to keep the planning process on track
- It is against this mandate that your president will examine:
 - Target audiences
 - Vivid descriptors
 - Target geography
 - Marketing goals
 - Individual action plans
 - Budget
- Presidents, deans, and leaders



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Foundation - continued

2. Designate a champion



To succeed, your marketing efforts must have a champion who is:

Knowledgeable
Trusted/Respected
Powerful
Passionate about marketing

It is almost always a mistake to have the marketing effort driven from "below."

Foundation - continued

3. Assemble and build the marketing team

- While the exact composition of the marketing team will change depending on the marketing mandate, most marketing teams include someone (or someones) from the following areas:
 - Leadership in the college or school
 - Recruiting and admissions
 - Academics/faculty
 - Fundraising and alumni
 - Institutional research
 - Finance office
- Don't forget a secretary/coordinator/document handler
 - Will also need to learn the planning software

Remember:

- The job of individual team members is to investigate and represent the interests of their stakeholders and constituents
- They need to conduct:
 - Conversations and interviews
 - Review of secondary data
 - Document review
 - Quantitative research
 - Focus groups



Titles or Talent?

Questions That Must Be Answered

- If you can't get the following questions answered, proceed cautiously:
 - What is the mandate?
 - Clear, definite, articulated, shared, and reasonable
 - Who is the champion?
 - How long will the plan run?
 - Minimum of three years
 - What is the budget?
 - Sustainable over plan's life
 - How will the plans "integrate"?



Time: 10 minutes

Worksheet: Marketing Mandate



- What are the overarching goals for this marketing plan?

- _____
- _____
- _____
- _____

Step Two: Undertake a Situational Analysis

- A situational analysis (SA) is a systematic evaluation of your institution and its environment from a marketing perspective
- Most SAs use one of two models:
 - **SWOT**
 - Strengths: internal qualities upon which you can capitalize
 - Weaknesses: inherent flaws, something to be overcome
 - Opportunities: things in your environment of which you can take advantage
 - Threats: dangers in your marketplace that could cause you problems
 - **PO**
 - Major problems (internal and external) facing the institution
 - Major opportunities (internal and external) facing the institution
- There is an emerging third model (see next slide)


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B-O-C

- Rather than SWOT or PO, let's look at B-O-C:
 - Barriers
 - Opportunities
 - Competitive advantage

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B-O-C Matrix

B-O-C Identification and Prioritization	
Internal barriers that will impede your marketing efforts • •	External barriers that will impede your marketing efforts • •
Internal opportunities that will enhance your marketing • •	External opportunities that will enhance your marketing • •
Competitive advantages • •	Parking garage 

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Get Inside Their Heads

- Their needs
- Their concerns
- Their hopes
- What motivates them
- Who influences them
- Their information needs and media habits
- How they perceive you and compare you to your competitors
- Preferences:
 - Majors
 - Formats
 - Delivery
 - Scheduling



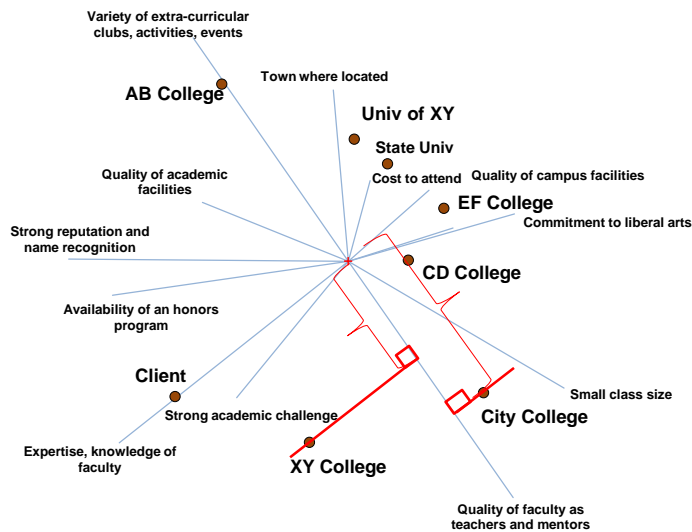
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Possible Research Studies



- Recruiting and retention
 - General prospects
 - Noninquirers
 - Nonapplicants
 - Nonmatriculants
 - Influencers
 - Current students
 - Withdrawing students
- Fundraising
 - Alumni
 - Current donors
 - Former donors
- General
 - Faculty and staff
 - Movers and shakers
 - Media
 - Legislators
 - Business leaders
 - Employers
 - Community residents
 - Peer institutions
- Environmental
 - Demographic
 - Economic
 - Job trends
 - Competitive analysis

Brand Attribute Map



Core Attributes

AB College

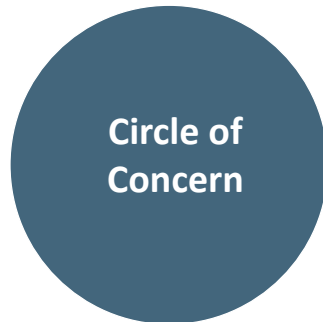
- Extracurricular
- Location
- Quality of academic facilities
- Reputation and recognition
- Honors program

Client

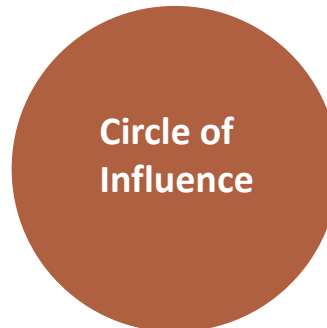
- Academic challenge
- Faculty skill
- Academic facilities
- Honors program
- Reputation, recognition

To interpret map: Each blue line or ray or line represents an indicated brand attribute. If a perpendicular line can be drawn from the attribute line through the point representing an institution, that institution is perceived as being associated with that attribute. Attributes which are stronger in terms of creating brand differentiation are represented by longer rays. An intersection farther out from the midpoint indicates a stronger association between brand and attribute. For example, both XY College and City College are associated with quality faculty but City College is perceived as stronger on this attribute (because it intersects the attribute line farther from the center)

As You Develop Your Situational Analysis, Keep in Mind...



Things you really can't do anything about



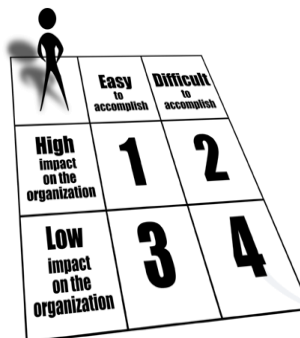
Things you can change

Source: Covey

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Strategies for Prioritizing

- Your SA will likely generate extensive and even cumbersome lists of SWOT/PO
- These lists must be prioritized so they become more manageable



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If You Had the Resources, What Research Study(ies) Would You Undertake First?

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Time: 15 minutes

Worksheet: Situation Analysis



- What are the major (prioritized) marketing problems/issues/opportunities this plan should address?

- _____
- _____
- _____
- _____

- What sources of competitive advantage have you identified?

- _____
- _____
- _____
- _____

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Decision Point—Situational Analysis



- It is very important that your final situational analysis is prioritized
- It must reflect the president's or dean's marketing mandate
- Before proceeding, the president or dean must sign off on the situational analysis

Step Three: Define Target Audiences

- Target audiences
 - A target audience is the person or group whose behavior or attitude you want to change or whom you wish to influence or inform
- Define target audiences by
 - Age
 - Geography
 - Household income
 - Ethnicity
 - VALs
 - Others



Time: 15 minutes

Worksheet: Target Audiences



- Who are your top five audiences for year one of the plan?

- _____
- _____
- _____
- _____

- Who will you add in year two:

- _____
- _____

- Year three?

- _____
- _____

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Decision Point—Target Audiences



- Limit yourself to a handful of target audiences in year one; add others in subsequent years
- Audiences must “mesh” with president or dean’s mandate
- Before proceeding, the president must sign off on the target audiences

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Step Four: Settle Vivid Descriptors

- When students, influencers, and others hear your name, what do you want them to think?
- Also known as benefit segments and brand attributes
- Important, believable, distinctive, engaging



You must have mindshare before you will ever have market share.

Descriptors - continued

- A degree completion program in Oregon:
 - A supportive campus culture
 - Faculty who care
 - High-quality facilities

Time: 15 minutes

Worksheet: Vivid Descriptors/Brand Attributes



- What are your top four or five vivid descriptors/brand attributes?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Decision Point—Vivid Descriptors



- Just as you limited the number of target audiences, you must limit the number of vivid descriptors to four or five
- Keep them simple (or else they won't be vivid)
- Vivid descriptors must be consistent with the mandate
- The president or dean must sign off on the vivid descriptors

Step Five: Refine Your Target Geography

- Primary and secondary markets
 - Think “small” (or in other words, focus)
- Analyze support structures
 - Major employers
 - Alumni
 - Population centers
 - Feeder colleges
- Analyze data
 - Competitors
 - Image “fall-off”



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Time: 15 minutes

Worksheet: Target Geographies



- What are your top four or five target geographies?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

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Decision Point—Target Geography



- Think “just big enough”
- Watch out for institutional ego
- Geography should represent key overlaps
- The leader must sign off on the target geography

Step Six: Establish Marketing Goals



- Marketing goals
 - A goal is the thing you want to accomplish (often called “objectives”)
 - Integrated marketing communication goals are designed to:
 - Create awareness (brand)
 - Generate a response (direct)
 - Sample IMC goal: Increase the percentage of prospective adult students within a 50-mile radius of Williamsburg who can identify one or more of our brand attributes from 7% to 17%
 - Integrated marketing goals address the Four Ps
 - Sample IM goal: Increase the first-year to second-year retention rate from 66% to 75% over a three-year period
 - Goals are “what”; action plans are “how”

Goals - continued

- Goals, audiences, and action plans
 - Goal:
 - Increase the percentage of prospective adult students within a 50-mile radius of Williamsburg who can identify one or more of our brand attributes from 7% to 17%
 - Target audience: prospective students that fit our profile
 - Action plans (sometimes called strategies or tactics):
 - Develop talking points for graduates and recruiters (compare and contrast)
 - Place quarterly full-page ads in regional papers
 - Conduct quarterly mailings to alumni parents within target geography
 - Send student “stars” back to their colleges

Good Goals Are SMART



One Year, Two Years, Three Years, or More

	Year One	Year Two	Year Three
Marketing Goals	<ol style="list-style-type: none"> 1. Brand 2. Student recruitment 	<ol style="list-style-type: none"> 1. Brand 2. Student recruitment 3. Annual fund 	<ol style="list-style-type: none"> 1. Brand 2. Student recruitment 3. Annual fund 4. Recruiting graduate students
Target Audiences	<ol style="list-style-type: none"> 1. Prospective students 2. Influencers 3. Business leaders 	<ol style="list-style-type: none"> 1. Prospective students 2. Influencers 3. Business leaders 4. Regional media 	<ol style="list-style-type: none"> 1. Prospective students 2. Influencers 3. Business leaders 4. Regional media 5. Community residents

Goals - continued

If at all possible, delay politically sensitive goals until the second year of the plan. This will allow you to build on the credibility you established during the plan's first year of operation.

Time: 15 minutes

Worksheet: Marketing Goals



- What are your top four or five marketing goals? (Remember to tie to SA and make them SMART.)

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Decision Point—Marketing Goals



- Are your goals:
 - Important?
 - Achievable?
 - Distinctive?
 - Consistent with your leader's mandate?
- The leader must sign off on the marketing goals

Budgeting

- The budget will be directly affected by the scope of the mandate
- Remember:
 - Don't begin something you can't sustain
 - Anticipate that your marketing efforts will heat up the marketplace
 - It is more about coordinating existing dollars than new dollars



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Factors That Impact Your Marketing Budget

- | | |
|--|---|
| <ul style="list-style-type: none"> ▪ Will require more marketing \$ <ul style="list-style-type: none"> ▪ No strategic direction ▪ Large, political marketing committee ▪ Weak champion ▪ No integration ▪ No baseline data ▪ Highly competitive marketplace ▪ Expensive media market ▪ More target audiences ▪ Contested position ▪ Less-valued position ▪ Complex position | <ul style="list-style-type: none"> ▪ Will require less marketing \$ <ul style="list-style-type: none"> ▪ Active alumni ▪ Strong or well-known athletic program ▪ Narrow focus and reasonable goals ▪ Smaller target geography ▪ Fewer target audiences ▪ Open position ▪ More-valued position ▪ Simple position |
|--|---|

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Apportioning Marketing Dollars

- Brand vs. direct (recruiting), 30% vs. 70%
- By campus
- By program
- By audience → primary and secondary
- By media channel
 - Internal communication
 - Public relations, including media relations
 - Traditional media (advertising) [print, broadcast, outdoor/transit, mall, etc.]
 - Interactive/direct marketing/social media
 - Experiential marketing (event, atmospherics, signage/vehicle ID)
 - Merchandising
 - Alliance marketing

Time: 15 minutes

Worksheet: Budgeting



- Which budget allocation option did you choose?
- Total budget: \$ _____
- How apportioned:

Category/Model/Approach	Percent of Budget	\$ Amount

Step Seven: Write Marketing Action Plans

- Marketing action plan
 - A marketing action plan outlines the activities that are designed to accomplish or help accomplish a goal
 - Who does what, when

- How they fit together
 - The goal is the thing you want done
 - The target audience is the people at whom the goal is directed
 - The marketing action plan is how you accomplish the goal



Dissecting a Marketing Action Plan

Description of Marketing Action Plan	Create a media database of all print and broadcast media writers/reporters within a 100-mile radius of the institution
Which goal does this MAP support?	Increase the percentage of prospective adult students within a 50-mile radius of Williamsburg who can identify one or more of our brand attributes
Target audiences	Regional editors and writers
MAP (step-by-step)	<ul style="list-style-type: none"> • Buy directories (1/15) • Select database software (1/30) • Input data (3/15)
Begin date	1/15
End date	3/15
Budget	\$1,600
MAP assigned to	Bob S.

Sample GANTT Chart

The screenshot displays the Marketing Calendar Office interface. At the top, it says "MARKETING CALENDAR OFFICE" and "Welcome Fran Anderson". The main area is divided into several sections:

- Home / Today:** Includes a calendar for February 2013 and a "View" dropdown set to "Dashboard".
- Manage My Office:** A sidebar menu with options like Home, Calendar, Campaigns, Projects, Events, Tasks, Press Releases, Approvals, Contacts, Budget, and Reports.
- Campaigns Table:**

Campaign	Description	Start Date	Due Date	Status
Marketing Calendar Office-Web	Promote MCO Online	09/25/2011	03/21/2013	63%
Disney Vacation Club-Membership	Promote vacation club membership	10/16/2012	03/30/2013	40%
Pulse EMV Deployment	Promote EMV Deployment to customers & Global	11/29/2012	03/30/2013	45%
PakSense Products Promotion	Promote PS Products	12/06/2012	04/06/2013	35%
The Albion Advantage	To promote the Albion Advantage to prospective ug	12/13/2012	03/30/2013	35%
Goodwill Indy Rewards	Promote Donate Shop Rewards Program	12/14/2012	03/29/2013	35%
- Events Table:**

Event	Campaign/Event	Start Date	Due Date	Status
AMA Symposium for the Marketing of Higher Ed		07/24/12	03/22/13	38%
AP11 Dinner Extravaganza		07/01/12	02/23/13	50%
Fran's Event		03/01/12	03/09/13	58%
Harvey Sparks Event		04/16/12	02/25/13	0%
Unicon New Employee Reception		04/17/12	02/21/13	50%
Big Blue Madness		07/10/12	02/23/13	0%
- My Approvals/Reminders / My Tasks Table:**

Approvals/Reminder For	Task Description	Project/Event	Start Date	Due Date	Status
No records found.	GP Brochure Graphic Design	GRRRR Guest Practitioners Brochure	01/04/13	02/05/13	25%
	Rewards Brochure Graphic Design	Goodwill Rewards Brochure	12/14/12	02/13/13	50%
	Advantage Brochure Graphic Design	Albion Advantage Brochure	12/13/12	02/08/13	50%
	Biomed Brochure Graphic Design	PS Biomed Trifold Brochure	12/08/12	02/05/13	50%
	Booth for Chicago	AMA Symposium for the Marketing of Higher Ed	01/03/12	02/15/13	75%

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Guidelines - continued

- Go for a fair amount of detail for year one
 - Provide detail for year two before the budget cycle
- Remember:
 - Each action plan must support one or more goals
 - Complex or deeply rooted problems or opportunities may require multiple action plans over time
 - While writing action plans, keep in mind how they will be evaluated
 - Remember to sequence action plans
 - Schedule short-term wins early in the plan

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Action Plan Template

1. Goal to be supported: _____
2. Description of action plan: _____

3. Target audiences
 - Audience A: _____
 - Audience B: _____
 - Audience C: _____
4. Begin date: _____ End date: _____
5. Budget: _____
 - Request for new dollars Reallocated from my budget
 - Reallocated from other budget
6. Assigned to: _____
7. How/when to evaluate: _____

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Time: 15 minutes

Worksheet: Action Plans



- Please write five action plan ideas around one of your marketing goals

-
-
-
-
-

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Step Eight: Assemble and Debug the Plan

- Does the plan focus on the president's mandate?
- Are you spending priority time and money on priority goals?
- Does the plan shake hands with existing plans?
 - Strategic - Advancement
 - Recruiting - Marketing
- Is there a clear delineation of who is doing what?
- Does it have a strong internal communication component?
- Does it meet the overall budget goal?
- Is there a solid, workable timeline?

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Organizing Your Action Plans

- By target audience
- By brand marketing vs. direct marketing
 - Don't forget internal
- By program
- By the Four Ps (or Four Cs)
 - Product - Customer
 - Price - Cost
 - Place - Convenience
 - Promotion - Communication

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Audience Communication Matrix

Audience Attribute Matrix				
Target Audiences	Target Geographies	Brand Attributes Defined	Media Preferences	Influencers
Audience 1	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Audience 2	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Audience 3	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Audience 4	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Audience 5	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.

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Step Nine: Execute and Evaluate (and Learn)

- Just do it
 - Monitor budgets and timelines
 - If an important goal is stalled, be willing to reallocate resources
 - Time
 - Money
 - What can we quit doing?

Q

How do you evaluate the plan's effectiveness?
How do you know when to update your plan?

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Execute and Evaluate - *continued*

- Evaluate and learn
 - Provide data for mid-course corrections
 - Determine the effectiveness of completed strategies
 - Demonstrate effectiveness
 - Adjust plans for next year
 - Gain credibility
- To evaluate and learn
 - Brand: repeat research studies to measure progress against the baseline
 - Direct: measure response
- Marketing progresses according to the quality of its measurement tools

**Are you measuring output
or are you measuring outcomes?**





Test, Test, Test

70-20-10



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mROI (Marketing Return on Investment)

- Why does mROI matter?



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mROI

- Brand
 - Repeat baseline research
 - Brand equity
 - Cost to recruit a student
- Direct
 - Response rate
 - Conversion rates
- Web
 - Click-throughs/tos
- Social media
 - Likes
 - Hits
 - Followers

Who Is Responsible?



- Marketing begins with strategic vision on how marketing can help
 - Usually this is from the president, dean, or other leader
- The leader must:
 - Establish a clear institutional direction
 - Enact enabling policy and remove organizational roadblocks
 - Allocate realistic resources
 - Link programs to budgets
 - Provide authority
 - Assign responsibility
- The leader can demand results
- Commitment is spelled \$

Hard-Won Marketing Axioms

- You must have something to market

**When you market a flawed institution,
more people find out about it more quickly.**

- Marketing requires a top-down buy-in
- The champion must be credible
- Marketing is a natural extension of strategic planning and must share common definitions
- Marketing is founded on research
- Marketing can be political

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Marketing Axioms - continued

- Marketing costs → you will spend money
- Marketing takes time
 - Don't try to solve every problem at once
 - Give it time—the effect is cumulative
- Respect for marketing must be earned
- Marketing is more than writing a plan

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Planning Postmortem

- A postmortem recognizes that planning is an ongoing process
- The postmortem is designed to help you evaluate the planning process you just completed so that your next planning cycle will be more effective and efficient
- Talk to the team
- Talk to the folks your team represents



Planning Software

- Planning software allows you to create templates that help you keep track of:
 - Activities
 - Manager
 - Cost
 - Timeline
- This can be an invaluable aid to managing your plan
- Planning software: Marketing Calendar Office
 - Marketingcalendaroffice.com



Change the Emphasis

- In the old days (last year) 10% of the creative dollar was spent on the idea and 90% on the placement
- Now, the emphasis is on the idea and if the idea is good enough, the placement is free



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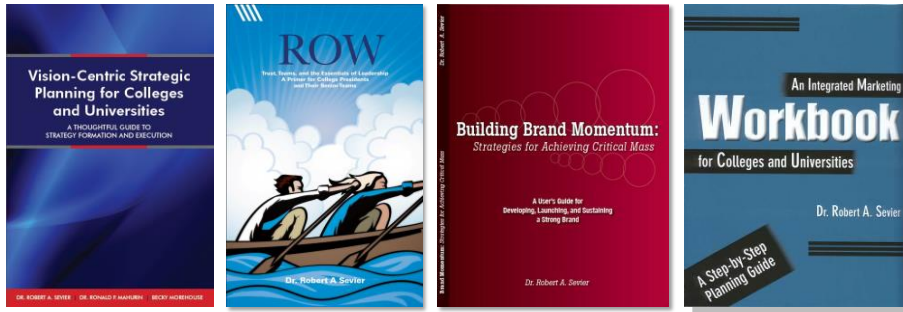
Final Question

Based on this presentation and your experiences at your institution, what ducks do you need to get in a row before you can begin the planning process?

- 1.
- 2.
- 3.



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