RICP — B2C, no partner persona

Prospect/Student discovers TAC & RICP program through organic search. No business partnership involved.

Phases: Awareness (Stranger) → Prospect (MQL) → Consideration/Lead (SQL) → Enrolled Student → Alumni

Student

Goal
(blank)

Thoughts / Feelings
(blank)

Experience
(blank)

Activity

Awareness (Stranger)
- Organic search
- Sees TAC-made content (external)
- Reads press / articles

- Visits TAC website to learn more about retirement income, RICP, college,

- Fills out form to download/view content
- Subscribes to future content

Prospect (MQL)
- Opens emails from marketing drip campaign
- Sees targeted content

- Reads white papers, research; views webcasts
- Continues to open email

Consideration/Lead (SQL)
- Fills out RFI form
- Calls for info
  (or)
- Lead score advancement

- Receives phone call(s)
- Emails are secondary method

- Continues to research and learn about RICP and speak with admissions

- Enrollment action via phone or web (web is primary)
- Student pays

Enrolled Student
- Take course content: read, study, practice
- Correspond via email with professors, advisors
  - Webinars, IRPs
- Complete three courses
- Notify advisor re: exam & schedule (call / web) w/PearsonVue
  - Take exam, pass
- Open pass exam email
- Apply for RICP designation
- Receive RICP
- Open emails – recertification, CE, donation, additional designation

Alumni — *Non-linear – could be none/any/all & in any order*
- Attend event – web or in-person
- Attend board meeting
- Get e-newsletter
- Transact: pay for recertification, donation
- Receive email survey(s)
- Answer survey
- Advocate for TAC
- Initiate process to enroll in another designation

Interaction

Touchpoint

Awareness (Stranger)
- Search engines
- Other websites
- A/V media (podcasts, webcasts)
- Social media
- Press/TAC-generated articles
- Advertising

- TAC website
- TAC-produced media on website
- Email

- TAC website
- Email
- Electronic form

Prospect (MQL)
- Email
- TAC Website
- External sites about TAC/RICP

- TAC website (directed landing) (non-interactive)
- Whitepapers
- Research
- Webcasts
- Email

Consideration/Lead (SQL)
- TAC website, form
- Phone call

- Phone call
- Email/templated email

- TAC website (directed landing) (non-interactive)
- Whitepapers
- Research
- Webcasts
- Email

- Phone call
- TAC website (enrollment portal)

Enrolled Student
- BrightSpace/LMS
- Produced course A/V media
- Produced course text material
- TAC website

- Email
- TAC Website
- BrightSpace/LMS

- BrightSpace/LMS
- Produced course A/V media
- Produced course text material
- TAC website

- Phone call
- Email
- Testing center

- Email
- TAC website
- LinkedIn

- Email

Alumni
- In-person contact
- Remote video contact
- Webcast
- TAC alumni website

- TAC website/portals

- Email
- TAC website

- In-person word-of-mouth
- Social media
- Internet
- Workplace advocacy (word-of-mouth, presentation, email)

- Phone call
- TAC website (enrollment portal)

Channel (Device)
(blank)

People (Environment)
(blank)

TAC

Goal
(blank)

Activity

Awareness (Stranger)
- SEO
- Paid search
- Social media (FB, LnkIn, Insta, Twtr, YouTube)
- Blogs, podcasts
- Press, events
- TAC generated articles

- Produced content to discuss retirement income, RICP designation
- Place on landing pages on TAC website

- Student prospect information added to ActOn to become MQL
- Prospect added to campaign workflow

Prospect (MQL)
- Initiate drip-style email campaign, including links
- Promote TAC produced content on TAC website landing pages

- Continue campaign
- Maintain Lead Score model, noting once MQL achieves score of 50 they are moved to SQL

Consideration/Lead (SQL)
- Answer email or call and Initiate SQL procedure for student
- Admissions advisor reaches out to student prospect (email templates)

- Call student within 24 hours
- Create student profile in SugarCRM
- Generate interest in RICP, learning about retirement income

- Attempt 3 contacts with student
- Continue to generate RICP interest
- Move student on to enrollment or back to MQL

- Fill out call sheet
- Set student up in PeopleSoft
- Complete enrollment in PeopleSoft or ECS
- Send LMS info to student (automated)

Enrolled Student
- Produce/update course material
- Produce instructional videos
- Publish/maintain course material, A/V

- Respond to student for course help (professors)
- Respond to student for non-course help (tech, scheduling, general assists)

- Email student (manual/auto) when prompts are met (quiz scores, lags in timing, register for exam, enroll in next course)

- Send files to PearsonVue so student can register for in-person testing *(PearsonVue registers student)*

- Send congratulatory email to student, remind to apply for designation
- Send RICP designation info to student (completer kit)

- Email to encourage add'l designations
- Email campaigns for recertification/CE
- Email campaigns for donations
- Email newsletters

Alumni
- Foster alumni communities with iModule
- Facilitate and liaise with alumni board
- Coordinate and host events

- Run survey campaign
- Survey student
- Compile survey information for feedback to TAC

- Regenerate lead cycle for student as SQL for another designation

Responsibility

Awareness (Stranger)
- Marketing; Academics; Web Services
- Marketing; IT; Web Services
- Marketing; Web Services

Prospect (MQL)
- Marketing; Web Services
- Marketing; Web Services

Consideration/Lead (SQL)
- Admissions; Marketing; OE (SugarCRM)
- Admissions; OE (SugarCRM)
- Admissions; Marketing
- Admissions; Student Support Advisor

Enrolled Student
- Instructional Design; Academics; Student Support Advisor
- Academics; Student Support Advisor
- Student Support Advisor
- Student Support Advisor; Exam Department
- Student Support Advisor; Registrar's Office
- Advancement; Registrar; Bus Development; Marketing; Student Exp

Alumni
- Alumni Relations
- Centers
- Admissions; Marketing

KPIs
(blank)

Other

Technology
(blank)

Data Capture
(blank)

Proposals

Experiments
(blank)

Process Change
(blank)

RICP — B2C, partner persona

Prospect/Student discovers TAC & RICP program through a marketing campaign initiated by their firm, deals with TAC directly.

Journey phases: **Awareness (Stranger)** → **Prospect (MQL)** → **Consideration/Lead (SQL)** → **Enrolled Student** → **Alumni**

Awareness (Stranger)

	Column 1	Column 2	Column 3
Student – Activity	• Opens email • Possible call • Direct recruiting from business partner	• Visits TAC website to learn more about retirement income, RICP, college	• Fills out form to download/view content • Subscribes to future content
Interaction – Touchpoint	• Email • Phone call • Business partners	• TAC website • TAC-produced media on website • Email	• TAC website • Email • Electronic form
TAC – Activity	• Email list generated from Discovery • List loaded into ActOn • Email and possible call campaign to build awareness	• Produced content to discuss retirement income, RICP designation • Place on landing pages on TAC website	• Student prospect information added to ActOn to become MQL • Prospect added to campaign workflow
TAC – Responsibility	• Marketing • Business Development • Admissions	• Marketing • IT • Web Services	• Marketing • Web Services

Prospect (MQL)

	Column 4	Column 5
Student – Activity	• Opens emails from marketing drip campaign • Sees targeted content	• Reads white papers, research; views webcasts • Continues to open email
Interaction – Touchpoint	• Email • TAC Website • External sites about TAC/RICP	• TAC website (directed landing) (non-interactive) • Whitepapers • Research • Webcasts • Email
TAC – Activity	• Initiate drip-style email campaign, including links • Promote TAC produced content on TAC website landing pages	• Continue campaign • Maintain Lead Score model, noting once MQL achieves score of 50 they are moved to SQL
TAC – Responsibility	• Marketing • Web Services	• Marketing • Web Services

Consideration/Lead (SQL)

	Column 6	Column 7	Column 8	Column 9
Student – Activity	• Fills out RFI form • Calls for info (or) • Lead score advancement	• Receives phone call(s) • Emails are secondary method	• Continues to research and learn about RICP and speak with admissions	• Enrollment action via phone or web (web is primary) • Student pays
Interaction – Touchpoint	• TAC website, form • Phone call	• Phone call • Email/templated email	• TAC website (directed landing) (non-interactive) • Whitepapers • Research • Webcasts • Email	• Phone call • TAC website (enrollment portal)
TAC – Activity	• Answer email or call and Initiate SQL procedure for student	• Call student within 24 hours • Create student profile in SugarCRM • Generate interest in RICP, learning about retirement income	• Attempt 3 contacts with student • Continue to generate RICP interest • Move student on to enrollment or back to MQL	• Fill out call sheet • Set student up in PeopleSoft • Complete enrollment in PeopleSoft or ECS • Send LMS info to student (automated)
TAC – Responsibility	• Admissions • Marketing • OE (SugarCRM)	• Admissions • OE (SugarCRM)	• Admissions • Marketing	• Admissions • Student Support Advisor

Enrolled Student

	Column 10	Column 11	Column 12	Column 13	Column 14
Student – Activity	• Take course content: read, study, practice	• Correspond via email with professors, advisors • Webinars, IRPs	• Complete three courses	• Notify advisor re: exam & schedule (call / web) w/PearsonVue • Take exam, pass	• Open pass exam email • Apply for RICP designation • Receive RICP
Interaction – Touchpoint	• BrightSpace/LMS • Produced course A/V media • Produced course text material • TAC website	• Email • TAC Website • BrightSpace/LMS	• BrightSpace/LMS • Produced course A/V media • Produced course text material • TAC website	• Phone call • Email • Testing center	• Email • TAC website • LinkedIn
TAC – Activity	• Produce/update course material • Produce instructional videos • Publish/maintain course material, A/V	• Respond to student for course help (professors) • Respond to student for non-course help (tech, scheduling, general assists)	• Email student (manual/auto) when prompts are met (quiz scores, lags in timing, register for exam, enroll in next course)	• Send files to PearsonVue so student can register for in-person testing *(PearsonVue registers student)*	• Send congratulatory email to student, remind to apply for designation • Send RICP designation info to student (completer kit)
TAC – Responsibility	• Instructional Design • Academics • Student Support Advisor	• Academics • Student Support Advisor	• Student Support Advisor	• Student Support Advisor • Exam Department	• Student Support Advisor • Registrar's Office

Alumni

Non-linear – could be none/any/all & in any order

	Column 15	Column 16	Column 17	Column 18	Column 19	Column 20
Student – Activity	• Open emails – recertification, CE, donation, additional designation	• Attend event – web or in-person • Attend board meeting • Get e-newsletter	• Transact: pay for recertification, donation	• Receive email survey(s) • Answer survey	• Advocate for TAC	• Initiate process to enroll in another designation
Interaction – Touchpoint	• Email	• In-person contact • Remote video contact • Webcast • TAC alumni website	• TAC website/portals	• Email • TAC website	• In-person word-of-mouth • Social media • Internet • Workplace advocacy (word-of-mouth, presentation, email)	• Phone call • TAC website (enrollment portal)
TAC – Activity	• Email to encourage add'l designations • Email campaigns for recertification/CE • Email campaigns for donations	• Foster alumni communities with iModule • Facilitate and liaise with alumni board • Coordinate and host events • Email newsletters		• Run survey campaign • Survey student • Compile survey information for feedback to TAC		• Regenerate lead cycle for student as SQL for another designation
TAC – Responsibility	• Advancement • Registrar • Bus Development • Marketing • Student Exp	• Alumni Relations		• Centers		• Admissions • Marketing

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Swim-lane row labels:

- **Student:** Goal · Thoughts / Feelings · Experience · Activity
- **Interaction:** Touchpoint · Channel (Device) · People (Environment)
- **TAC:** Goal · Activity · Responsibility · KPIs
- **Other:** Technology · Data Capture
- **Proposals:** Experiments · Process Change

RICP — B2B, partner persona

Prospect/Student discovers TAC & RICP program through their firm and deals with their firm until enrollment.

Phases: Awareness (Stranger) · Prospect (MQL) · Consideration/Lead (SQL) · Enrolled Student · Alumni

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Student

Goal

Thoughts / Feelings

Experience

> Business partner handles most of this – current view is Awareness / Prospect / Consideration as one phase, but provision / space left to break it down or correct details with further validation

> Non-linear – could be none/any/all & in any order

Activity

Awareness (Stranger)	Prospect (MQL)	Consideration/Lead (SQL)	Enrolled Student					Alumni				
• Receives employer pitch for designation (occasionally pitch will be received direct from TAC business development) • Learns of opportunity from BD affiliate education offer	• Reads email • Attends presentation • Listens to manager or colleague • Reads print material	• Initiates actions to learn more • Visits corporate portal or TAC website • Visits other websites	• Student proceeds to website for registration & enrollment (in some cases there are custom processes, e.g.: NWM prepayment portal, custom landing pages; can also call if process allows) • Company or student pays based on contract	• Take course content: read, study, practice	• Correspond via email with professors, advisors • Webinars, IRPs	• Complete three courses	• Notify advisor re: exam & schedule (call / web) w/PearsonVue • Take exam, pass	• Open pass exam email • Apply for RICP designation • Receive RICP	• Open emails – recertification, CE, donation, additional designation	• Attend event – web or in-person • Attend board meeting • Get e-newsletter	• Transact: pay for recertification, donation	• Receive email survey(s) • Answer survey	• Advocate for TAC	• Initiate process to enroll in another designation

Interaction

Touchpoint

Awareness (Stranger)	Prospect (MQL)	Consideration/Lead (SQL)	Enrolled Student					Alumni				
• Email • A/V Presentation – in person • A/V presentation – computer • 1:1 with manager/colleague • TAC-partner collaborated print material • Employer intranet	• Search engines • TAC website • TAC-produced media on website • A/V media (podcasts, webcasts) • Whitepapers • Research • Webcasts • Social media • Press/TAC-generated articles	• Employer intranet / portal • TAC website-hosted portal for their employer • TAC website • Phone call	• BrightSpace/LMS • Produced course A/V media • Produced course text material • TAC website	• Email • TAC Website • BrightSpace/LMS	• BrightSpace/LMS • Produced course A/V media • Produced course text material • TAC website	• Phone call • Email • Testing center	• Email • TAC website • LinkedIn	• Email	• In-person contact • Remote video contact • Webcast • TAC alumni website	• TAC website/portals	• Email • TAC website	• In-person word-of-mouth • Social media • Internet • Workplace advocacy (word-of-mouth, presentation, email)	• Phone call • TAC website (enrollment portal)

Channel (Device)

People (Environment)

TAC

Goal

Activity

Awareness (Stranger) / Prospect (MQL)	Consideration/Lead (SQL)	Enrolled Student					Alumni			
• BD VPs pitch RICP designation to insurance, BD, RIA firms home office • Sign contract to promote designation; often with discounts, to employees of firm • Promo codes are created for discounts or to be placed on contracts for standard enrollment process via website • Firm handles promotions internally but business development coordinates for TAC • Produce marketing and awareness material for company to provide • Integrate TAC and partner web portals or custom design TAC landing portal for partner (if applicable) • BD AVPs responsible for branch level student procurement/enrollment targeting	• TAC receives enrollment data about student via method determined by company contract (website, custom landing page, custom process, etc.) • Inputs created in PeopleSoft and LMS activated for student • Note: NMW student automatically added to PeopleSoft and enrolled from their portal • Note: NYL also has some system integration with their LMS	• Produce/update course material • Produce instructional videos • Publish/maintain course material, A/V	• Respond to student for course help (professors) • Respond to student for non-course help (tech, scheduling, general assists)	• Email student (manual/auto) when prompts are met (quiz scores, lags in timing, register for exam, enroll in next course)	• Send files to PearsonVue so student can register for in-person testing *(PearsonVue registers student)*	• Send congratulatory email to student, remind to apply for designation • Send RICP designation info to student (completer kit)	• Email to encourage add'l designations • Email campaigns for recertification/CE • Email campaigns for donations	• Foster alumni communities with iModule • Facilitate and liaise with alumni board • Coordinate and host events	• Run survey campaign • Survey student • Compile survey information for feedback to TAC	• Regenerate lead cycle for student as SQL for another designation

Responsibility

Awareness (Stranger) / Prospect (MQL)	Enrolled Student					Alumni		
• Business Development • Marketing • Academics • IT • Admissions • Finance	• Instructional Design • Academics • Student Support Advisor	• Academics • Student Support Advisor	• Student Support Advisor	• Student Support Advisor • Exam Department	• Student Support Advisor • Registrar's Office	• Advancement • Registrar • Bus Development • Marketing • Student Exp	• Alumni Relations	• Centers	• Admissions • Marketing

KPIs

Other

Technology

Data Capture

Proposals

Experiments

Process Change