Awareness (Stranger) – Business-to-Consumer, no business partner

Student Action	College Action	Touchpoint

• Organic search on web (e.g.: Google)
  o Includes keyword, relevant phrases used in search engine
• Sees TAC generated activity
• Sees press/article
• Listens to podcast (e.g.: with Wade Pfau as guest) referencing TAC/RICP
• Student prospect goes to TAC website, engages with positioned ungated content to learn more about RICP, retirement income and/or TAC
  o Research
  o White papers
  o Info about RICP
  o Webcasts/Podcasts
• Student prospect fills out a contact form for more information, registers for gated content
  o Subscribes to future content as well
• Student prospect can call using the number of the website to talk to an admissions advisor
	• Little to no advertising
	• Marketing engages in SEO and paid search
	• Positioning: blog posts, podcasts
	• Social Media: Facebook, LinkedIn, Instagram, Twitter
	• Appearances in press, live events
	• TAC will write/position articles
	
	Responsible
	
	• Marketing
	• Academics
	• Web Services
	• IT
		• General internet
		  o Search engines
		  o Other web sites
		  o Media appearances
		  o Social media
		• TAC Website
		• Audio/video media including podcasts
		• Press/articles
		• Email
		• Electronic Forms
		• Phone (possible)
		
		Systems
		
		• Google Analytics

Awareness (Stranger) – Business-to-Consumer, business partner

Student Action	College Action	Touchpoint

• Student prospect opens a targeted email from Marketing
• Direct recruiting from business partner to student prospect
• Email may have link to web page, form and can include phone number – form/phone call is forwarded to admissions
 	
• Remaining flow is like B2C, no business partner (replacing organic search with targeted awareness)
	• Email lists generated from Discovery by Marketing based on campaign criteria pre-determined
	    ○ Business Development primary generator of lists – come from contacts @ TAC partners
	    ○ Usually based on targets from aligned organizations where marketing is allowed (*see grey below*)
	• *TC works with business partner to identify categories of prospects*
	    ○ *Prospects may be targeted based on likelihood of completing program*
	    ○ *Business partner will help direct targeting to agents, field leaders, home office staff*
	    ○ *Business partner helps with list pull*
	    ○ *Business partner learning & development or field leadership will directly recruit students to participate in company specific cohorts*
	• Lists loaded into ActOn Marketing database where targeted marketing campaign effort is run
	• There was mention of cold calling too by Admissions using the lists (verify, conflicting info)
	
	Responsible
	• Marketing
	• Business Development
	• Admissions
		• Emails
		• Phone
		• Business partner employees (colleague, manager, training)
		
		Systems
		• Google Analytics
		• ActOn
		
		• Remaining touchpoints like B2C, no business partner

Awareness (Stranger) – Business-to-Business, business partner

<table>
<tr><th>Student Action</th><th>College Action</th><th>Touchpoint</th></tr>
<tr>
<td>
Student prospect made aware of RICP opportunity via corporate pitch, training & development, manager, and/or colleague
Occasionally TAC business development will make the pitch directly
Student prospect goes to directed intranet (partner) or internet (TAC) portal to learn more
Student prospect receives physical material to learn more
Student prospect learns of RICP through affiliated BD firm as an educational opportunity
Student encounters custom material and reads or views it
Student does own research on TAC website and sees all materials a B2C student has access to
</td>
<td>
Business development will pitch RICP designation to insurance firm, broker dealer, RIA, etc. – pitch could be to firm execs or direct to agent/advisor

Handled by the VP @ Home Office level [designation, contract, discounts]
AVPs work the branches to generate interest [student recruitment]
Companies will often reimburse or pay directly
Discounts up to 25% available as a TAC incentive to pitch designation to cohorts, prospects
Business will approve marketing of designation on business card

Aligned business partner will handle almost all awareness, prospecting, consideration for TAC RICP – ergo there is no direct marketing effort
Indirect marketing effort – material (web, physical)
Possible web design work for landing pages

Responsible

Business Development
IT
Marketing
Academics
Admissions
Finance
Partner firm
</td>
<td>
Business partner intranet
Physical material (e.g.: brochures)
Business partner employees (colleague, manager, training)
Webcasts
Podcasts
Internal video reviews
Email
TAC Website
Other websites

Search engines
Other web sites
Media appearances
Social media

Systems
External?</td>
</tr>
</table>

Prospect (MQL) – Business-to-Consumer, no business partner

Student Action	College Action	Touchpoint
• Student prospect opens emails from campaign • Student prospect interacts with links to research, whitepapers, webcasts from campaign • Student prospect can actively request information about retirement income or RICP or to enter the SQL process	• Student prospect information added to Marketing database (ActOn) and student becomes a Marketing Qualified Lead (MQL) • A drip style email campaign is initiated • Promote material, RICP information on TAC site, other links to other sites, other media • Lead scoring model overlayed onto student and once their lead score reaches 50, they become a Sales Qualified Lead (SQL) and enter the Consideration/SQL phase • Student can become an SQL lead faster if they initiate through web interaction **Responsible** • Marketing • Web Services	• TAC Website • Whitepapers/research • Webcasts • Emails • External websites **Systems** • ActOn

Prospect (MQL) – Business-to-Consumer, business partner

Student Action	College Action	Touchpoint
• Once a prospect, flow is like B2C, no business partner		

Prospect (MQL) – Business-to-Business, business partner

Student Action	College Action	Touchpoint

• May not be a separate consideration here
• Do not have any specific clarity into distinct "Prospect" component
• Possible this 'phase' can be combined with the former or it is something completely different
	• *Not related to college/student touchpoint, but business development sought to position that the business partner is often a prospect too by noting:*
	  ○ *Outside of direct student/prospect contact, TAC will nurture prospect business relationships too*
	  ○ *Note upcoming webinars, program enhancements, promotions, white papers*
	  ○ *Build the value proposition over time*	

Consideration (SQL) – Business-to-Consumer, no business partner

Student Action	College Action	Touchpoint
• Student receives phone call(s) • Student receives emails from marketing/admissions • Student researches RICP on TAC website • For enrollment action: student typically enrolls via phone call whether inbound or outbound • For enrollment action: student has option to enroll via the web (preferred)	• Once student becomes an SQL, they are to receive a call within 24 hours from admissions advisor • Information entered into SugarCRM • Follow a defined process and time box to move them either toward enrollment or back toward being an MQL • Generates interest in RICP/TAC, learning about retirement income • Primarily calls, can be emails • Attempt three contacts • Enrollment: Admissions fills out a call sheet and enrolls the student • Student is set up in PeopleSoft or ECS **Responsible** • Admissions • Marketing • Student Support Advisor	• Phone calls • Emails (including templates) • TAC website **Systems** • SugarCRM • ActOn • Cisco • PeopleSoft

Consideration (SQL) – Business-to-Consumer, business partner

Student Action	College Action	Touchpoint
• Once in consideration phase, flow is like B2C, no business partner		

Consideration (SQL) – Business-to-Business, business partner

Student Action	College Action	Touchpoint

• For enrollment action: student comes to the web portal designated
  ○ NWM: has their own portal on their site
  ○ Most other partners: link to the TAC site (possibly some landing page customization like NYL and Thrivent)
  ○ Possible: enroll through TAC main portal
• Enrollment paid for one of three ways: Company pays, student pays and is reimbursed, student pays
	• Note: when enrolled NMW's system can send student info into PeopleSoft directly from their pre-payment portal. There is an automated process in Peoplesoft to create student account when they set up their account on the NWM intranet.
	• Note: for NYL there's integration with their LMS
	• For enrollment action outside of NWM Dell Boomi APIs for both website and NYL integrations that set up the data in Peoplesoft, new student creation as well as enrollment.
		• TAC website
		• Custom web portals

Enrolled Student

Student Action	College Action	Touchpoint

• Student accesses BrightSpace to go to course content (eligible as soon as in PeopleSoft and paid)
  ○ Available via smartphone, tablet & computer
• Self-study (no paper books, ~300-page outlines per class, 3 classes)
• Possible to attend live webinars and live Intensive Review Programs (IRPs) (unsure if applicable to RICP in current state)
• Email professor(s) or instructional assistant if they have questions
• Can attend live office hours with professor(s) via Zoom
• Email with Student Support Advisor
  ○ Tech help
  ○ Exam scheduling
  ○ Non-content items
• Email Academic Advising for other questions
• Open email from Academic Advising
  ○ E.g.: poor results "get in touch with professor" but can be ma/
  ○ Nudge to schedule a test
  ○ Usually automated, can be manual too
• Some students (NMW, SF e.g.) must complete course before moving to next course
• Call advisor or Pearson Vue to schedule exam or schedule online
• Take exam (in person)
• Receive email you passed the course and apply for designation
• Apply for designation
	• Write/update course material
	• Publish course material
	• Create instructional videos (course is completely web-based)
	• Serve instructional videos on LMS (BrightSpace)
	• Email student (manual or automated trigger) for various prompts:
	  ○ Log on more to study
	  ○ Poor quiz results
	  ○ Schedule testing
	• Reply to student questions (advising, professors, and instructional assistants)
	• Live office hours offered with professor(s)
	• Offer live webinars and live IRPs (might not be applicable in current state)
	• Sends exam information to Pearson Vue with student/exam/ exam window after enrollment
	• Initiate designation application
	• Student advising, handles things like:
	  ○ How to get them into the next course
	  ○ Encourage (failed) test retake
	  ○ Discuss next designation
	  ○ Offer promotions
	
	Responsible
	
	• Instructional Design
	• Academics
	• Exam Department
	• Student Support Advisors (as part of Student Experience)
		• TAC Website
		• BrightSpace
		• Email
		• Phone
		• Course content
		• Testing center (in person)
		
		Systems
		
		• SugarCRM
		• BrightSpace
		• PeopleSoft
		• Cisco
		• Dell Boomi (integration tool for Peoplesoft/Brightspace)
		• Okta – single sign-on from website to Brightspace

Alumni [May break down by “Designation,” “Advocacy,” “Donor,” or other categories]

<table>
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Open emails
Answer phone
Attend web event
Attend in-person event
Attend board meeting

Participate in related thematic (e.g.: marketing) special projects
Read designation newsletter

Signify interest in another designation
Donate money
Initiate and pay for recertification
Advocate for TAC
Complete survey

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Post-certificate test pass:

Email & congratulate the student
Confer a diploma, certificate, digital certificate (e.g.: LinkedIn)
Note: no longer in-person conferment but interest in reinitiating

Prompt that said “no better time to get your next designation…”
Alumni board facilitation
Foster alumni communities using iModule
In-person event hosting
Web event hosting
Email blasting (sometimes targeted by degree) at all levels of alumni process

Donation
Recertification
Advance back to student process
Designation newsletters

Surveys
Remind alumni of CE requirements, ethics attestation and confirm contact information is up-to-date

Responsible:

Advancement (fund raising)
Registrar’s Office (recertification)
Business development (more courses)
Admissions (more courses)
Centers
Alumni Relations
Marketing
Student Experience

</td>
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Emails
Webcasts
Alumni website
TAC website
In-person events
Board meetings
Survey
Remote video contact
Phone (possible)

Systems

Raiser’s Edge
iModules
PeopleSoft

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