MARKETING OPERATIONS COMMUNICATIONS ANALYSIS CONTENT OUTLINE

Cover/Title

[SECTION] SECTION 2: STRUCTURE

[SECTION] SECTION 3: SYSTEMS

[SECTION] SECTION 4: RESOURCES and PEOPLE

[SECTION] SECTION 5: PARTNERSHIPS

[SECTION] SECTION 6: POWER DYNAMICS

[SECTION] SECTION 7: PROCESSES

Backcover

[SECTION] SECTION 2: STRUCTURE RECOMMENDATIONS

Recommendations

UNDERSTANDING OF SELF AND BRAND

Leverage a brand platform; in the form of a series of living documents, to define precisely who <CLIENT> is, as a framework for all internal and external communications.

Solicit the collective commitment and buy-in necessary to position the <UNIVERSITY OR COLLEGE>'s cause, story, and subsequent platform as a powerful tool to be used freely by the entire campus community.

Rectify any mercurial split among those campus staff and faculty who feel that the <UNIVERSITY OR COLLEGE> has a streamlined and recognizable brand and those who lament that the University lacks a long-term foundational value proposition.

Recognize that consistency is king among reputational growth and effectiveness and address any inconsistencies present through the repeated sharing of a unified, and authentic institutional narrative aligned with a predetermined strategy.

STORYTELLING

Implement a more strategic approach to personality-infused storytelling and visual personification to serve as the basis for defining a stronger brand identity.

Extend the unified identity, once developed to visual brand and editorial standards to ensure a consistent voice, tone, look, and feel across all channels.

Recognize that collaborative planning and strategic goal-setting will be the key to success as the University works to regain command of its institutional narrative.

STRATEGIC PLANNING

Cascade the strategic themes and objectives defined within the <STRATEGIC PLAN TITLE> plan to individual schools, colleges, and offices as planned.

Ensure that any efforts to expand marketing's reach and define <CLIENT>'s brand positioning take in account and align with larger <UNIVERSITY OR COLLEGE>-level strategic initiatives.

Evolve current planning processes through the initiation of a series of planning meetings with key constituents to develop goals and communications plans that can position the <OFFICE> to align with best practices, commit more resources to preemptive reputation advancement, and build the sustainability of staff workloads.
- Implement the collaborative process planning guide included in the Appendix of this report.

Work to make sure that any strategic planning meetings foster opportunities to discuss how unit-specific goals augment and support institution-wide goals and <CLIENT>'s forthcoming reputation messaging platform.

Allow the <OFFICE> to become the champion driving the annual communications planning processes in tandem with <UNIVERSITY OR COLLEGE> Administration.

Establish regular planning meetings — at a minimum annually, ideally quarterly — with key departments for the sake of developing strategic goals and priorities. Utilize these

meetings to guide marketing and communications initiatives for each stakeholder in a manner consistent with the achievement of overarching marketing goals for the <UNIVERSITY OR COLLEGE>.

Adhere strictly to a regular planning schedule within these meetings to develop ongoing awareness and trust in the <OFFICE>'s commitment to serving the needs of each constituency.

Require short—and long—term strategic planning at the <LEADERSHIP>, <ENROLLMENT FUNCTION>, and <ACADEMIC> levels across the <UNIVERSITY OR COLLEGE> to establish priority analysis and decision making in-step with enterprise-wide planning and strategic initiatives.

Aggregate individual office and program plans into a widely distributed campus-wide annual communications plan that can help foster transparency and equip the entire community with knowledge of the roles, goals, and resources of the <OFFICE>.

Ensure strategic planning includes measurable goals that are communicated and referenced in evaluating success and steering future decision-making. Goals should measure levels of engagement such as open rates, social media clicks, email click-throughs, and other measurable outcomes.

Leverage the complete <UNIVERSITY OR COLLEGE> communications plan to begin each cycle with a focus on those strategic initiatives with the greatest impact on <CLIENT>'s reputation, direction around the implementation of tactics and output creation, and clear measures to evaluate any work completed.

Reevaluate marketing priorities to ensure marketing the <UNIVERSITY OR COLLEGE> as a unified institution is the first imperative, and decisions about marketing programs or events are made with an awareness of how these efforts speak to the overarching <CLIENT> narrative.

Continue to leverage the following named metrics and sources of insight as part of the annual communications planning process: program enrollment and capacity, industry or workforce demands, program marketing website traffic, and current and prospective student biographical and demographic data and survey responses.

Prioritize key, strategic, enterprise, and departmental marketing needs which elevate reputation and drive enrollment.

Adjust communications strategies to meet goals.

AUDIENCE DEFINITION & DEVELOPMENT

Shift audience definition from the present level of internal or external audiences to a level more aligned with industry best practices as the <UNIVERSITY OR COLLEGE> works to implement its new messaging platform in the coming year.

Realize that, in reality, most everything is external-facing due to the prevalence of campus visitors, guests, and community members and thus capable of impacting brand affinity or revenue.

Begin developing communications segmentations to provide personalized content and build prospective student affinity with <CLIENT>. Cross-segment academic interests and key demographic populations with psychographic profiling to begin building a segmentation matrix in line with best practices for peer and aspirant institutions.

Utilize system platforms that can segment by audience to generate personal messaging specific to the individual recipient.

Invest in a robust CRM system, appropriate staffing resources, and dedicated budget dollars to allow the <OFFICE> to build and maintain effectively segmented communications.

Benchmark the functionality and features of any new CRM solution according to its ability to allow for segmented communications, list generation, student filtering, and adequate student data management.

Define and create intentional audience segmentations in advance of the planned CRM transition scheduled to occur in <TIME FRAME> and then deploy once it has been implemented.

Shift the communications and marketing model to focus on the specific audience and purpose of each initiative.
- Allow this new model to replace any existing model employed by some who view communications or marketing efforts as intended for internal or external audiences.

Carefully track inquiry and enrollment data points such as demographic information, feeder institution, place of employment, and employment field to construct a more distinct understanding of each program's prospective student audience.

Define the specific audience for each communications touchpoint or marketing piece created.

Prioritize audience for all outreach efforts based on a framework such as the 3Rs.

OFFICE POSITION WITHIN <CLIENT>

Establish <OFFICE>, at both a structural and strategic level, as the <CLIENT>'s internal marketing agency, focused on providing strategic marketing leadership and planning for the Institution. Shift outward perception away from the current model of serving as a reactionary service provider.

Ensure that the <OFFICE> has the correct team structure and adequate operational budget to position itself as a strategic marketing arm for the entire <UNIVERSITY OR COLLEGE> following the introduction of a <UNIVERSITY OR COLLEGE>-wide communications plan, robust brand and messaging standards, and transparency around the project management process.

Equip the <OFFICE> with a well-developed messaging platform to position it to consult with stakeholders in offices and programs as strategic leaders; exemplifying, providing training, and requiring all publicly-communicating <UNIVERSITY OR COLLEGE> members to consistently elevate the <UNIVERSITY OR COLLEGE> storyline and brand while articulating unique stories and strengths through the overarching message platform.

Realize that the repositioning of the <OFFICE> from service providers to strategic partners will require dynamic and effective leadership, extensive training of both present and forthcoming resources, and a steadfast commitment to the <UNIVERSITY OR COLLEGE>'s success.

Establish consistent internal channels for project requests with parameters and protocols which are communicated effectively across the organization to facilitate project intake and planning. Institute these steps over time to unify <OFFICE> with all of the necessary internal stakeholders, align its work with enterprise strategic planning, and position it to provide the marketing leadership and expertise required to drive reputation and brand extension through on-personality storytelling.

Engage with personnel across the <UNIVERSITY OR COLLEGE> to provide both training and strategic perspective to utilize self-service tools for communications that are not within priority purview.

MISCELLANEOUS

Consider a study of program demand to determine which undergraduate and graduate programs currently have the greatest market demand and centralize growth goals and investments in high-demand programs accordingly.

Utilize the results of the forthcoming brand perception awareness study to shape strategic long-term marketing and communications goals.

[SECTION] SECTION 3: SYSTEMS RECOMMENDATIONS

Recommendations

Investigate best-in-class instances and usages of enterprise-wide project management, customer relations and engagement management, and social management systems to contribute to the Office of Marketing and Communications' (<OFFICE>) long-term success.

PROJECT MANAGEMENT

Leverage the present instance of Basecamp used within the <OFFICE> more broadly throughout the University to realize a number of benefits, including increased collaboration, scheduling, and planning capabilities, resource and budget management and allocation, and enhanced documentation of both the process and status of projects.

Harness Basecamp's or other project management software's more advanced features that offer increased visibility into the workloads of colleagues, centralized project communications, calendars, and archives, and seamless access to all necessary project information for all Office members as backstops and fail-safes so that, if necessary, anyone can step in and immediately access all elements needed to complete a project.

Disseminate the Basecamp instance to partner offices and colleges and the campus community at large to foster greater transparency, in the <OFFICE>'s process itself, into a specific project's progress, and in identifying any potential bottlenecks.

Encourage and nurture more clarity at the system level through expanded permissions that allow users from external departments to self-monitor the progress of individual projects.

Realize that even with on-demand project management software access, both current and recommended direct liaison connections will still be crucial to healthy partnerships between the <OFFICE> and external offices and groups.

Leverage the data from the successful tracking of projects within Basecamp to inform the team of trends in workload, growth, and seasonality of work to guide forecasting and resource planning on all timescales.

Investigate the functionality of the project management software to determine whether it provides a way in which outside constituents may be kept apprised of a project's progress.

Establish clear guidelines for defining a "project" to ensure that metrics tracked year over year remain comparable.

DATA MANAGEMENT (CRM/CEM + REPORTING)

What follows is a set of detailed recommendations, most of which are specific to leveraging a CRM instance, to influence the quality and complexity of the data management and recruitment efforts of individual staff. Without question, the combination of recommendations here represents closer to an ideal state of CRM usage. Carnegie Dartlet recognizes the capacity constraints and related challenges to achieving this state. The focus of these recommendations is at a level of detail that will require the additional building of CRM knowledge within the <OFFICE>, academic affairs, and enrollment staff as well as dedicated focus and time to achieve them.

Ensure that the forthcoming CRM instance is intended for enterprise-level use, integrates into all CEMs (outreach managers), and is utilized institution-wide to drive cross-functional collaboration.

Begin to align the <OFFICE> and <CLIENT> itself with CRM best practices, even in advance of selection and deployment through enhancement to the Office's evaluation, data management, and reporting abilities. Plan to additionally support the Office of Enrollment Management's efforts to create prospective and current student journey maps and structure segmented communication flows within the CRM.

Evolve current evaluation measures within the Office beyond the perceived quality of the content created and tie any metrics such as open and click-through rate, likes, shares, and views to progress toward annual goals.

Ensure that all program data is cleaned and accurately maintained in order to harness the CRM's ability to provide real-time queries and reports leading to actionable strategies, as part of the realization that data is an institutional competency.

Ensure that any system implemented throughout the University offers the <OFFICE> the ability to pay attention to each collateral product's ability to advance the <CLIENT> reputation and story.

Develop automation within the system so that the leads generated through social media advertisements and any other source can be automatically uploaded into the CRM with appropriate source attribution.

Deploy dedicated landing pages for specific campaigns and page-by-page profiles that can help gauge the performance, analysis, and optimization of academic sites and campaigns.

Create a full-time operational position, through hiring or transition of non-data or CRM responsibilities from a current staff member focused exclusively on CRM implementation and strategy. Position expectations should include expertise with CRM transitions and implementation, management of permissions, responsibility for all data integration and integrity, and the support of users throughout the campus community.

Consider formally developing a cohort of CRM "power users" that includes individuals from offices outside of marketing and communications with the expertise to provide training and support to less experienced system users.

Dedicate weekly time for CRM users and champions to systematically identify and implement features.

Chart a course, in partnership with Carnegie Dartlet, to data, digital, and analytic prowess through the development of in-house expertise in data capture, maintenance, and analysis.

Begin to carefully track and study data to help <CLIENT> identify prospective students most likely to yield, moments within communication flows to all audiences with the most influence, programs that are on track to meet enrollment goals, and programs that will require extra investment to achieve established goals. Construct advanced data structures capable of tying such insights back to <OFFICE>-led or orchestrated initiatives and, over time, enhance the University's reputation and even revenue generation.

Leverage any research and benchmarking efforts undertaken by the Office of Enrollment Management to review enrollment numbers and other key metrics to determine marketing needs and communication pushes.

Strive to bring Google Analytics under the <OFFICE>'s' purview to allow system-level reporting and metrics and the optimization of the website according to SEO best practices, content strategy, and conversion tracking.

Generate and maintain a robust set of reports that provide visibility into program enrollment via the dashboard feature. Such visibility will help to orient academic leaders and other responsible staff around the audience pipeline as well as recruitment-related engagements and conversions on a daily basis.

Task the <OFFICE> and any offices with access to databases to review trends, identify opportunities, and steer decisions that support successful outcomes on a day-to-day basis.

Use vanity URLs for each campaign to track effectiveness. Specific campaign URLs will allow <CLIENT> to see which advertisements were most effective in motivating responses to particular calls to action.

Optimize data through the creation of dashboards by which all involved can easily monitor progress within various goals as well as the effectiveness of various marketing tactics.

SOCIAL MANAGEMENT

Restructure access to all social holdings contained within the "Social Media Directory" so that the <OFFICE> possesses administrative permissions, usage rights, and the ability to actually revoke access, as necessary.

Develop metrics for evaluating social media engagement success. Consider the work of peer institutions in developing goals. Identify benchmarks by which to continually monitor progress and outcomes.

Continue to expand Social Media Best Practice guidelines, despite them already being more comprehensive than those possessed by institutions and offices vastly larger than <CLIENT> and the <OFFICE> as social norms and networks evolve, splinter, and grow.

Consider more effective options for social media management solutions and tools given evolutions in functionality and features which may have surpassed natural capabilities and expertise.

Leverage Social Media Best Practice content as curriculum within both live and on-demand <OFFICE>-led method and messaging training for social media managers throughout the campus community.

Convene all social media content managers to develop a joint editorial calendar planned 6-12 months out in advance to reduce individual efforts while maximizing messaging consistencies and opportunities to scaffold content across multiple platforms.

Create communities for prospective and current students on social media, focused on building an authentic and safe space for all to communicate and connect with their direct and self-identified populations.

Create a shared editorial calendar to appropriately share content between the main <CLIENT> social media holdings and the Office of Enrollment Management profiles.

Develop campaign integration plans within social media with a minimum of six-month time horizons in collaboration with other key stakeholders.

Establish the <OFFICE> as the administrator and keeper of administrative profiles, usernames, and passwords for any and all <CLIENT> social media profiles to ensure that, if need were to arise, the Office would be able to terminate a user's account access and prevent a potential communications crisis.

Overlay an editorial calendar University-wide which cohesively incorporates student-specific information with general institutional brand communications given the success of communicating with prospective and current student audiences via social networking platforms.

MISCELLANEOUS

Use the metrics established in the annual communications plan, as well as the Balanced Scorecard framework being introduced as part of the University's strategic plan, to develop a scorecard or dashboard for each goal, tracking identified metrics to determine if goals are on track for successful completion or if either marketing and communications or key stakeholders have action steps necessary to ensure goal completion.

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NOT USED

Continue with the strategy to annual plan with each College but do this three years at a time and not just annually. Institute this proactive planning and shared goals regimen as the new model to lead the proactive culture of the marketing and communications function and ensure maximum partnerships and results that achieve combined goals. List clearly in each plan the college or partner's specific goals and use the plan to drive the <OFFICE>'s content production for the year. See "APPENDIX I: Planning and Process Guidelines."

Extend the Basecamp tool currently deployed within the Office beyond any organizational boundaries as a project management system that can ensure resources and capacity are planned more strategically.

CRM SYSTEMS

Broaden the core CRM user base to include at least five staff members trained extensively in advanced CRM functions. Such an effort protects the University from any enterprise risk if one or more staff members leave the institution.

Develop automation within the system so that the leads generated through social media advertisements and any other source can be automatically uploaded into the CRM with appropriate source attribution.

Utilize A/B/C testing within all email journeys to begin identifying the most effective subject lines, images, calls to action, send dates and times, and message lengths. Continue finessing email journeys in response to findings.

Consider formally developing a cohort of CRM "power users" that includes individuals from offices outside of marketing and communications with the expertise to provide training and support to less experienced system users.

Engage not only basic demographic information and communications-flow tracking within a successful leveraging of the University's CRM tools to empower a real-time tool that engages data that measures student signals as well as psychographic knowledge for nuanced and specific recruitment methods. If well utilized, this tool's capabilities will grow the impact of <CLIENT>'s academic leaders and Enrollment Management Counselors as they pull and read daily reports to understand how markets are performing, and also which feeder colleges/universities, organizations, businesses, and prospective students require specific communications or attention.

Ensure that all relevant recruitment-related data is stored and coded within the CRM to provide visibility into those influential institutions and organizations, document any programs and communications to them, and measure outcomes.

Ensure that all program data is cleaned and accurately maintained in order to harness the CRM's ability to provide real-time queries and reports leading to actionable strategies, as part of the realization that data is an institutional competency.

Begin preparations to broaden the CRM userbase to fully leverage recruitment capabilities and relationship management across all programs. Leverage the complete functionality of these tools beyond the capabilities of the small population within the University, to realize those nuanced capabilities within the CRM. While the familiarity developed over the life of CRM functionality within <CLIENT> will expedite growth within the forthcoming CRM instance, increasing the user base will require consistent, targeted training on those elements of the tool that are most conducive to recruitment management.

Adopt and implement a system-wide CRM solution. Ensure key staff members from critical offices dedicate significant time to be fully trained in accurate data input and effective data reporting and analysis.

FORTHCOMING CRM IMPLEMENTATION

INTRO: What follows is a set of detailed recommendations, most of which are specific to leveraging a CRM instance, to influence the quality and complexity of the data management and recruitment efforts of individual staff. Without question, the combination of recommendations here represents closer to an ideal state of CRM usage. Carnegie Dartlet recognizes the capacity constraints and related challenges to achieving this state. The focus of these recommendations is at a level of detail that will require the additional building of CRM knowledge within the <OFFICE>, academic affairs, and enrollment staff as well as dedicated focus and time to achieve them.

Dedicate weekly time for CRM users and champions to systematically identify and implement features.

Create a full-time position that is solely dedicated to the CRM instance to help enable midstream, real-time corrections, or adaptations based on relevant data findings.

Pursue the long-term benefits of shifting language and culture to follow the naming conventions that serve as descriptors of a prospective student's status.

Develop a robust cache of influencers (organizations, businesses, etc.) that are critical to building the prospective student pools for each program. Ensure that the records are positioned to be leveraged within a centralized CRM instance.

Measure travel through the consistent utilization of relevant CRM functionality.

Ensure that all forms seamlessly integrate with the forthcoming CRM and verify and clean new data on a consistent basis.

Use forms and RFIs to capture "permission to text" with up-to-date phone number data as early as possible to leverage texting capabilities strategically.

Map out all possibilities within the entire prospective student journey before launching or implementing campaigns within the CRM. Although potential journeys may be staged within the CRM in advance, knowing where the prospective student is headed will enable the University to prioritize which features to invest in, what messages to send, what channels to utilize, and perhaps most importantly, how to structure reporting based on key metrics related to critical conversions.

Identify non-competitor institutions that also have an instance of the same CRM as <CLIENT> with whom to share best practices and features.

Measure conversions with more accuracy as tracking becomes more so a function of reporting.

Ensure that conversions are a direct measurement of articulated strategies.

Avoid the temptation to move to the deposit yield as the ultimate conversion to justify the strategy.

Maintain a disciplined approach to conversion measurement to record the results of each strategy appropriately. Measure name search purchases by engagement, not necessarily by deposits.

Compile relevant data into easy-to-digest reports (e.g. heat maps, charts, tables, etc.) that can give clarity to enrollment performance and lead to prompt, data-driven decisions.
- Examples should include:
  - Weekly reports on recruitment activity that include numbers associated with qualified inquiries, applicants, admits, and deposits.
  - Reports that help understand how travel programs and ground game influence enrollment as well as quantify how many prospective students interacted with staff and in what capacity.

Consider implementing a University-wide CEM or email tool, across all offices, to provide regular all-campus communications. Leverage this platform's analytics tools to inform internal communications strategy.

COMMUNICATION FLOWS

Develop and implement a data-driven communications-flow strategy that drives storytelling and the development of affinity:
- Garner feedback, content, and collaboration from partners.
- Layer institutional and program-specific storytelling upon point-in-time conversion-driven messages.
- Engage prospective students and ancillary audience pools through social channels with corresponding campaign content.
- Develop more robust strategies for marketing to key markets and influential organizations.

Develop a comprehensive communications strategy that includes digital advertising that complements communication flows, recruitment activities, and yield strategies.

Build brand awareness and reputation through messaging that differentiates among key competitors, both at the institutional and program level.

Measure affinity along every communications flow by evaluating open rates and click-through performance based on email subject lines and purposefully maintain a "device-agnostic" approach to how emails and campaigns render on all platforms and devices. Develop an understanding of affinity at strategic points within audience populations to identify useful signals for the determination of yield opportunity.

Consider using affinity-based metrics, developed over time, to concentrate yield campaign efforts and resources around those prospective students with the highest affinity, even if specific affinity scores are not used to determine admission.

Incorporate A/B/C testing as a vital tactic of a larger ongoing messaging strategy. Break the audience into recipient groups and test email subject lines, images, length of forms, postscript notes, as well as any other element of messaging to provide insights about affinity or engagement.

Continue to develop inquiry journeys for each program. Assess on an ongoing basis and adjust annually based on intelligence from engagement, affinity, and testing measures.

Develop journeys for admitted students. These should tell the <CLIENT> story and include information on outcomes, financial aid, next steps, current student success stories, and more. Start with the programs that have the greatest need in yield, so that when applicants are admitted, the yield journey can build upon the storytelling and any affinity development that precedes it. Over the next few cycles, continue the buildout to address all programs.

Consider developing two admitted student journeys for those programs that currently have a high percentage of application as first contact. Those who received the inquiry journey will not need as much of the storytelling content as those who enter the communications flow at the point of application.

Prioritize authentic and emotive stories within email communications to invite prospective students on a journey of discovery.

Over time develop a balance between narrative storytelling and the necessary delivery of facts.

Elevate stories that distinguish <CLIENT> from its competitive set and provide a foundation upon which the most relevant facts can be highlighted. Accomplish this by focusing on both the University as a whole and individual programs specifically as appropriate. Over a series of emails and clicks, engage prospective students in a story that depicts both the University and program in a compelling, on-brand manner. In a journey of ten emails, ground six to seven in strong storytelling. Accomplish this by adding a short paragraph or series of bullet points to either tell a brief story or intrigue the recipient with a teaser and then link to said story on a landing page. For the remaining emails in the journey, deliver timely facts, process-related details, points of contact, as well as event invitations.

Continue to maintain consistency through email headers. Effective header templates can be an effective tool that not only provides brand consistency but also the opportunity to include a different and compelling photograph within each email. Continue to build out the photography assets that can be leveraged in emails as this resource will only rise in importance with the growth of email journeys.

Deploy a variety of calls to action throughout communication flows that direct prospective students to relevant landing pages that provide access to engaging and regularly updated content. Consider leveraging landing pages for digital campaigns where it makes sense.

Send handwritten congratulatory notes from academic leaders to admitted students that were highly engaged during the recruitment process — whether measured by engagement, affinity, or based on visit experience.

Build an alumni communications flow featuring student stories, highlighting graduate programming, and offering referral incentives.

Integrate text messaging into communication flows as a channel that can highlight process and deadlines as well as drive urgency. Differentiate between SMS and personal text communications so that each prospective student's importance is only reinforced through personal text communications.

Treat the admission notification as a moment of delight to re-enforce affinity. Reimagine the admission and award letter(s) or package as a mailbox moment, even if it follows a digital notification. Design and content elements should convey a sense of accomplishment and purpose while projecting an air of gravitas worthy of admission to <CLIENT>.

Include branded items (both digital and physical) that keep <CLIENT> front of mind and serve as small rewards for or celebrations of admission.

Add delight to the admission moment with a hashtag and opportunity to share an admitted student's accomplishment on social, particularly in association with branded digital swag.

Allocate resources towards the establishment of a Design Portal in order to comply with best practices while delivering more assets to the campus community.

Implement the training necessary to position the OCM as the primary experts and users of the CRM system scheduled to be introduced in two years.

Develop reports grounded in analytics that can be completed, shared, and reviewed as a team regularly to measure progress and adjust workflows.

Develop a metric dashboard to gauge the success of various communications and campaigns.

DEVELOP A COLLATERAL LIBRARY

Create a Collateral Library of design templates that can be accessed by various Offices in order to self-fulfill lower-visibility projects. The Library could exist as a PDF or static web page where campus partners can self-fulfill lower-visibility projects like fliers (through the customization of templates) and either download the file to print themselves or request printing from the <OFFICE>.

Leverage the most advanced capabilities of a CRM system, in conjunction with the Office's project management and CEM systems to drive cross-functional collaboration between all parties.

Consolidate systems used by various parts of the University. If the use of the same system-level solution is not possible, ensure all platforms being used have the ability to integrate and information-share.

Institute Office-level oversight of all outreach and communications efforts being undertaken by any campus community.

Investigate internal and external research tools and services that would use data and analysis to inform <CLIENT>'s strategic decisions on where and who to target in conjunction with demographic and psychographic identification and segmentation.

Institute a more data-driven approach to communications and marketing as a science campus-wide.

Evolve marketing and recruitment funnels so metrics can be tracked for each and every step of any funnel.

Design a metric-driven dashboard to monitor and take into account every type of metric imaginable.

[SECTION] SECTION 4: RESOURCES & PEOPLE RECOMMENDATIONS

Recommendations

RESOURCES HOLISTIC

Structure dedicated resources and teams grouped around key partner groups like the offices of Undergraduate Admission and Advancement, etc.

Centralize the marketing budget so that all marketing expenses can be reviewed as a whole and allocated appropriately. Fully centralize the marketing budget to leverage funds, allocate budget annually based on institutional priorities, and drive reputation, revenue, and recruitment (both graduate and undergraduate).

REPUTATION & MESSAGING PLATFORM

Complete a messaging platform and style suite necessary to advance <CLIENT>'s reputation, recruitment, and revenue by expanding current brand standards and templates current limited state and creating narrative and visual messaging guides to empower groups to more effectively tell the <CLIENT> story.

Build a messaging platform identifying <CLIENT>'s primary institutional messages with careful consideration of specific institutional differentiators.

Leverage such a platform as a framework upon which unique voices and contributors can connect their value, insights, and perspectives to the broader work and mission of <CLIENT> as recently codified within the "Impact 2025 and Beyond" strategic plan.

Leverage the created messaging platform as a foundational guide for communications endeavors, providing a framework upon which to connect individual communications to institutional identity.

Train members of the campus community, starting with key influential leaders, in use of the messaging platform, offering both a robust round of introductory training and ongoing training opportunities.

Foster stronger comprehension around the University's brand, address the gap between current and desired familiarity levels, and create key unique value propositions through the creation and use of a robust messaging platform.

Clarify <CLIENT>'s genuine and prized differentiators with specificity, homing in on how academic excellence, integrity, and its NASA roots, for example, can be reflected on campus.

Be sure to incorporate the forthcoming reputation strategy within the suite of brand

guidelines being developed. Consider whether it makes sense to wait to widely distribute said guidelines until the Office is able to build upon the structure introduced within <CLIENT>'s reputation strategy.

Ensure that <CLIENT>'s forthcoming reputation strategy is launched with the infrastructure necessary to support and champion it across campus to drive traction, both internally and within the marketplace.

Evolve current editorial style guidelines from formal titles of campus building, structures, teams, etc. to instead prescribe tone, voice, and how communicators should talk about who <CLIENT> is, what <CLIENT> does, and who <CLIENT> serves.

Leverage any tools capable of enhancing the connection between individual stories and the recognizable <CLIENT> identity to grow the institution's reputation and elevate the significance of individual contributions as part of a broader global impact.

Strengthen the story — and reputation — behind <CLIENT>'s name by integrating traditional advertising methods that allow the University to tell more of its story, such as highly targeted and personalized direct mail campaigns (like oversized full-color postcards), which, when integrated with email campaigns, can prove effective.

BRAND AND CONTENT STRATEGY

Continue to develop and expand effective content strategies, impactful storytelling, and emotive, personality-driven imagery. Leverage these fiercely to deliver an impactful brand narrative that eliminates communication voids too often filled by negative media attention.

Work with academic programs to develop value proposition statements for each college and program and use these key messages as the basis of all program communications. Strive for a consistency in messaging that can achieve familiarity and trust.

Clearly delineate the value propositions of degrees and certificates within communications for those departments that offer both.

Develop a plan for each asset developed to be utilized six to ten times across channels to both bolster brand and message consistency and also ensure creative outputs are utilized to the fullest potential.

Develop an editorial calendar for photography with at least a one-year runway that identifies anticipated image needs, how images will be captured, publication needs which may require images from central events, and personality dimensions and key institutional messages that images will convey.

Focus on developing personality and story-driven content within all communications. Lead with stories that illustrate <CLIENT>'s unique community and value in order to build a deeper connection with prospective students.

Build a story bank of pre-developed and pre-approved story-laden content that can be utilized in collateral materials. Position story banks as a solution to relieve content creation burdens and establish a recognizable, consistent, and always accurate <CLIENT> story.

Establish a strategic leadership team of members from key offices and programs to receive training and lead department efforts to train and enforce style and content standards for all materials. Have the <OFFICE> work in tandem with this team to elevate publication standards.

Insert touchpoints within marketing staff meetings that showcase brand successes to both provide adequate and ongoing examples of on-brand communications and celebrate staff achievement.

Ensure communications, including webpage and email content, tell the unique and authentic <CLIENT> story. Focus on stories that differentiate <CLIENT> from the competitive set.

CREATE TOOLS FOR CAMPUS CREATORS

Construct a storytelling and communication portal in which members of the <CLIENT> community can easily find messaging standards, templates, logos, and style guidelines.
- Consider making the following tools accessible within the communications portal to all campus constituents:
    - Logo and wordmark downloads
    - Logo guidelines
    - Color palettes and standards
    - Typography standards
    - Photography galleries
    - Editorial style guides
    - Design templates
    - Pre-designed and templated posters
    - Pre-designed and templated handouts
    - Letterhead
    - Business card templates
    - Presentation templates
    - Document templates
    - Trademarks and licensing information
    - Social media standards
    - Content guidelines
    - Hashtag guidelines

Provide these tools and assets to the campus community as a way of empowering on-brand communications while granting the <OFFICE> time to focus on strategic projects.

Once created, train University communicators in the resources available in the portal, such as templates, messaging guides, etc. The goal is to provide all communicators with tools and support that streamline communications efficacy.

Expand the understanding and usage of the current brand guidelines document held by all individuals within the campus community who engage in communications. Consider adding to its functionality, particularly around imagery selection and photography use, by giving details about camera angles, subject expressions, setting, lighting, and filters that define a <CLIENT> portrait.

Develop a digital library of on-personality photography assets readily available and searchable to facilitate image selection on a project-by-project basis.

Digitally archive photography and video assets as well as interviews, stories, and design collateral, tagging each to facilitate search and access.

Build a more robust style guide and launch internal education initiatives to empower departments and preemptively equip them with the information needed to succeed.

Provide individualized training to client partners about how their particular story is supported and enhanced through the University's overall storytelling strategy through the

utilization of the <CLIENT>'s personality solution, platform messaging tools, and enhanced brand standards

Consider integrating individual contributor's work into the standards as examples of how adherence to a unified style guide still leaves room for individual creative expression.

Ensure in-house and any outsourced collateral (if applicable) evoke the same brand story.

PEOPLE HOLISTIC

Develop a plan with Administrative Leadership to annually grow OCM staffing levels to bring <CLIENT> marketing and communication staff resources in line with advancing technology, industry best practices, and industry marketing standards where needed.

Determine ways to invest appropriately in the <OFFICE> to give it the resources required for the growth <CLIENT> desires and give the Office the tools and training necessary to operate at a strategic level.

Adopt a proactive approach to resource planning to determine annual headcount levels necessary for the <OFFICE> to rise to meet larger institutional goals.

Focus on and invest in growing the headcount and the abilities of the <OFFICE> to wean itself of any outsourced third-party creative solutions.

Strive to move all content creation responsibilities away from the <ROLE> to allow them to focus on strategic planning, executive communications, and leadership.

Strive to reduce the amount of time the <ROLE> spends on data input and tactical work within <CRM> to generate the capacity to work on marketing strategy and strategic management.

Prioritize the OCM staff's time on communications with the greatest impact on reputation, revenue, and recruitment, establishing the story and style that other offices and groups can follow.

Strive to create an understanding among institutional leadership that marketing spend must increase in order to position <CLIENT> to attain growing individual program enrollment goals, launch new programs, and compete for students in smaller, niche programs.

Institute capacity management and resource planning initiatives, both on the annual and quarterly time frames, to level workloads and minimize any need to work outside of office hours.

Adopt a centralized staffing model within the <OFFICE>. This will require shifts to individual responsibilities and accountabilities, as well as several additional hires. Once adjustments have been made with all current staff, prioritize the immediate hiring of the following positions:

Bring all Office of Communications positions physically into one shared office space with time.

Invest in the evolution of digital and video strategy within the <OFFICE> given the rising import of digital marketing.

HUMAN CAPITAL/STAFFING

Informed by any constraints present within the active hiring freeze, create and recruit a

role with extensive brand strategy experience to aid in the determination of long-term marketing vision and strategy.

Invest in observed resource needs such as content strategists capable of gaining and communicating domain and subject expertise, a digital marketing specialist to drive digital strategies, define metrics, and construct dashboards and reports, a full-time videographer and photographer to replace the current Multimedia Specialist with plans to leave, and a dedicated project manager to coordinate traffic and workflows.

Task the Content Strategist position with the responsibility for developing marketing content, working in <CRM> to build out prospective student journeys, pulling of marketing reports, assisting in the analysis of marketing data, and providing general content support as needed.

Consider recruiting the following short-term positions to ensure the timely implementation of key systems:

Within the staff growth plan, prioritize the _____ and _____ additions to the OCM.

Longer term, work toward a collective aspiration to position a complete resource hub (direct liaison or Account Manager, Strategist, and Graphic/Web Designer) to work exclusively and strategically with the Office of Enrollment Management.

Launch a social marketing student ambassador program to assist on the ground and provide student perspectives, even if such a program requires incentivization measures.

Develop greater design capabilities in conceptual design, either through training and personal development of <OFFICE>'s current graphic design team or recruitment of additional positions.

Designate members of the <OFFICE> who can actively serve as liaisons between the Office and key campus partners, including Admissions, Enrollment Management, and academic programs either through the evolution of current Communications Coordinator positions or a new formation. Include within such liaison's R2A2 responsibilities the need to attend stakeholder planning meetings, offer marketing and communications insights, and keep the <OFFICE> abreast of their specific partner's initiatives and activities.

Evaluate the current workload carried by the Associate Vice President for Marketing and Communications to ensure their ability to focus on strategic leadership and long-term planning initiatives.

Begin modeling potential departmental management structures in advance of their need and deployment so that the growth of the <OFFICE> can be approached in a strategic versus organic manner.

Determine what a sustainable resource growth rate might look like for the <OFFICE> to more effectively model capacity and workload forecasts for a period greater than the immediate year.

Ensure a dedicated Project Manager or Traffic Coordinator position is planned for and hired in the <OFFICE>'s' near-term staffing strategic plan.

Determine and implement dotted line accounting structures where appropriate based on the prioritization levels established by Administrative and <OFFICE> leadership.

Restructure the <OFFICE> so that direct liaisons manage the strategic planning initiatives for their assigned constituency while a centralized Content and Creative team provide

creative execution. Such a model ensures resources are available to both champion strategic communications initiatives and develop the creative collateral to serve these strategies.

PHOTOGRAPHY & VIDEOGRAPHY RESOURCING:

Consider the need to augment present videography capabilities a critical resource need given the significance of visual expression in effective market communication. During the search process to replace and onboard a new Multimedia Specialist, develop both a preferred vendors list and a defined process for strategic video development. Vet any vendors on the preferred list and these external partners in <CLIENT> messaging and style guides.

Expand videography resources beyond the FTE recommended into a videography team to take on more expansive video efforts and tackle very specific video use cases.

Develops a planning process for campus units to think through audience and strategy for any video production, noting if there is potential for dual-purpose footage or final video use, and ensuring the unit creating a video has complied with all legal guidelines.

Develop a digital library of institutionally-approved image assets available and searchable to all members of the campus community to facilitate the pervasive use of imagery that best supports the University's reputation and identity.

Create a videography/photography studio on campus where the <OFFICE> can generate frequent video content. In the short-term consider non-traditional spaces, such as basement classrooms or offices which might be converted for this purpose.

Establish a practice of capturing both still images and video whenever a shoot is scheduled to maximize the return on every individual's time and effort.

Strategically reutilize, repackage, and redeploy limited imagery assets as much as possible.

Identify a minimum of six planned uses for any imagery assets as part of the creative planning process prior to a photo or video shoot. For example, ...

Ensure the capture of any photography and video assets enables easily editing for deployment via digital, social, and print channels.

DIGITAL MARKETING & ANALYTICS NEEDS

Develop a more data-driven culture to strengthen outcomes while maintaining the current allocation of resources through the proactive and intentional monitoring of Google Analytics, adjustment of content based upon web traffic, and utilization of A/B/C testing to inform campaign and collateral variables based on variables such as images, headlines, subject lines, CTAs, day and time of campaign sends, etc. If the ability to do so is not presently within the capabilities of the <OFFICE>, begin recruiting for an individual to lead such efforts in tandem with the launch of training and education among the current team.

Plan for either a staffing reconfiguration or new hire to strengthen in-house digital marketing talent to allow for the leveraging of data to best steer marketing strategies.

Long-term broaden the <CRM> team to include at least four to five users with the skill to build journeys, pull reports, and deploy communications.

TEAM CROSS-TRAINING, CONNECTIONS, & PERSONAL DEVELOPMENT

Create systems of collaborative planning and training, implement analytics and measurement, and adopt best practices to increase workflow efficacy and empower the <OFFICE> to further elevate its reputation and position within the University and subsequently that of the University itself.

Develop Roles, Responsibilities, Accountabilities, and Authorities (R2A2) for each member of the <OFFICE>, Academic Leaders, and Office of Enrollment Management positions to ensure clear consensus as to individual responsibilities and avoid any duplication of efforts. A sample R2A2 form is included in the Appendix.

Document and share workloads to relieve the enterprise risk of irreplaceability in employees in addition to building continuity and sustainability. Best practices would suggest that <CLIENT> ensures that critical work can continue uninterrupted even if a pivotal team member departs abruptly.

Formalize cross-training efforts to ensure multiple people have the knowledge of and access to critical functions within marketing and communications. Benefits of cross-training include reduced enterprise risk and stress, evens out workload imbalances, and provides individual staff members with opportunities for professional growth and skill-set expansion.

Ensure a bench of at least two back-up Graphic Designers with the knowledge and experience to step in and create on-brand designs if an immediate need were to arise.

Provide continual training and development for Account Managers to ensure they can act on clearly defined strategic priorities.

Define clear and prioritized goals, as determined at annual and quarterly planning meetings and informed by the institution's highest initiatives, to give members of the <OFFICE> the ability to strategically achieve said goals on a longer timescale.

Immediately implement standing traffic control meetings with the entire Office to brainstorm and review asset usage and come up with ways to strategically leverage across all platforms. Utilize this meeting as a regular check-in as to how progress is aligning with the annual forecast and resource plan.

Consider the optimization of any regular and repeated meetings, given the impact they have upon successful collaboration and the monopoly they exercise upon individual's calendars, an Office-wide priority.
- Aspire to ensure that all meetings have a clear structure, prove more dynamic, applicable, and collaborative for all attendees, and identify explicit action items, next steps, and accountabilities.
- Emphasize high-level and strategic agenda topics more than tactical and urgent concerns to help the Office grow into the strategic leaders and partners it aspires to be.
- Increase the efficiency of meetings to decrease overall frequency, increase buy-in and intraoffice alignment, and help ensure appropriate workloads.

Allocate resources for each staff member to participate in ongoing professional and skill development to help ensure that, in the ever-evolving field of marketing and communications, Office members possess the skills to continue to provide exceptional communications.

Fix any knowledge gaps that inhibit a marketing mindset by familiarizing team members with industry best practices and addressing any cross-functional deficiencies.

Minimize the perceived obligations to meet outside expectations by defining more precisely those projects and outcomes for which an individual is responsible.

Route any errant requests that fall outside an individual's defined R2A2 to the appropriate person through the greater collective comprehension of the roles, responsibilities, authorities, and accountabilities of all.

[SECTION] SECTION 5: PARTNERSHIPS RECOMMENDATIONS

Recommendations

PARTNERSHIP HOLISTIC

INTERNAL PARTNERSHIPS

Position the <OFFICE> to play three distinct roles within any inter-office relationships: strategic experts, brand advocates, and key partners.

Continue to build out the suite of resources available for the campus community to empower greater sustainability and self-reliance among staff members in fulfilling less strategic communications. Complement the existing logo and wordmark downloads, logo guidelines, color palettes and standards, typography standards, social media guidelines, style guides, and existing templates, with photography galleries, pre-designed PowerPoint templates, pre-designed and templated handouts, and examples of both on-brand and incorrect messaging, imagery, and design.

Develop and regularly offer brand guideline and messaging training to update staff about available brand resources while building a culture of self-sufficiency around internal communications. Despite the required initial time commitment, in the long term this will alleviate the burden on marketing and communications staff when it comes to less influential collateral.

Develop an annual strategic planning process shared by the <OFFICE> and Administrative Leadership to determine and assign strategic partnerships and sub-departmental reporting structures to key revenue generators according to either established department priorities or a to-be-introduced model like the 3Rs framework, which prioritizes such partnerships on revenue, recruitment, and reputation.

Develop and continually deepen strong and healthy partnerships between the <OFFICE>, Academic Affairs and faculty, and offices of Enrollment Management and International Admissions and Programs to further grow and sustain <CLIENT>.

Prioritize partnerships between the communications and marketing function and key partners based on college-wide strategic goals and priorities.

Utilize the recommended annual planning process to identify strategic priorities for communications resources. Be very granular in communicating timeline and process, i.e. how long each step takes, how many revision rounds, feedback loops, etc., when championing and advocating for the new process and systems being implemented.

Develop an annual planning structure and shared goals between the Offices of Enrollment Management and Marketing & Communications, aligning the annual and long-term goals of the two Offices.

Develop shared program enrollment goals that are the shared responsibility of the <OFFICE>, academic leaders, and other stakeholders to ensure all efforts drive toward a shared purpose. Jointly establish and measure progress against goals for each step of the enrollment process, such as inquiry, response, application, interview, and enrollment and then meet regularly to review progress and adjust efforts accordingly.

Immediately implement more education, tools, and training among the campus community including Administrative Leadership so all can better understand the intent and role of marketing.

Communicate regularly with stakeholders regarding the status of goals pertaining to them and meet regularly as an entire marketing and communications team to review scorecard status and address any progress concerns.

Utilizing <CLIENT>'s personality solution and marketing platform, train and empower staff across campus to create content that highlights their group's contribution to the University story. Develop a training schedule that continues to provide platform, messaging, and brand standard training to departments to build current and effective communication knowledge across offices, colleges, and programs.

Continue to seek opportunities to equip groups with marketing and communications tools and skills. On an on-going basis consider the current needs and requests of campus constituents and proactively respond with new training and strategies to promote the most effective and cohesive messaging.

Delineate clear roles and responsibilities for Directors, Deans, and other faculty or staff leadership for successfully interfacing with the Office of Marketing and Communications.

Continue to build the Office's reputation as marketing and communication experts by becoming the driver of advanced and regular strategic planning. This will also decrease the "urgent, but insignificant" asks presented to the office.

Continue to value and prioritize relationship management with key departments across campus. Shifting practices to more closely align with the strategic leadership model, engaging offices in communications planning, and executing effectively will be critical to success.

Continue efforts to establish regular meetings with marquee offices such as Enrollment Management and Advancement as this will enable Account Managers or direct liaisons to advocate for the adherence to the process as opportunities for deviation arise.

Harness and communicate those innovative and exciting initiatives that are already occurring within the organization such as global partnerships championed by the Office of International Admissions and Programs to increase <CLIENT>'s recruitment, reputation within the marketplace through cascading such news through external community partners, and even revenue.

Implement a formalized system to solicit and collect stories of exciting initiatives occurring within the campus community through the designation of direct liaisons for, or even dual reporting structures to, specific partner groups.

Consider ways for Academic Affairs and the <OFFICE> to partner in bringing truly inspiring current student stories to the forefront of institutional communications and campaigns as the University transitions its communication style.

Reposition any interactions between the <OFFICE> and partner groups from the historically reactionary, needs-driven, and transactional to be stronger when it comes to proactive strategizing and planning.

Hold partner groups accountable for the need to clearly articulate its goals for current and coming cycles if such partners expect the <OFFICE> to develop robust marketing plans and tactics to support said goals.

Task subject matter experts throughout the University to draft marketing content due to their status as experts of their domain. Counsel subject matter experts to understand, and even expect, that the content they provide may need to be changed for brand, SEO, or other marketing purposes. In short, invite greater transparency and collaboration into the content generation process.

Clearly define more realistic response expectations through the adherence to an established process with clear terms of service and timeline.

Educate the campus community regarding the establishment and reasoning for processes, timelines, and prioritization of the projects introduced by the <OFFICE>.

Roll out of campus-wide training is suggested incrementally, such as:
- A campus-wide email introducing the process itself. The development of such an email and the depiction of the process it contains should be given significant investment before deployment, since this may be many people's first glimpse of the new process.
- Build an internal website to house further educational materials and include the website's link in <OFFICE> team member's email signatures.
- When bandwidth is present, host informal training sessions and solicit invitations to attend other groups' standing meetings, with the goal of both observing and perhaps walking that group through the process.

Empower team members to say "no" or point partners to templates as proportionate to the prioritization given to that partner as related to the 3Rs framework.

Develop an annual training schedule inclusive of brown bag lunches, digital recordings, and open office hours in which the <OFFICE> can cover key subjects like social media, the marketing project process, or how to use a photography/videography asset database.

Launch ongoing training efforts and specific content-focused training modules as soon as they can be strategically developed.

Subject every decision made that impacts one office to a thorough evaluation of how such a decision affects the other.

EXTERNAL PARTNERSHIPS

Continue to increase "ground game" efforts within local businesses and community organizations. Forming relationships with these entities will not only help place graduates, but also bring to light potential success stories that could be shared to further <CLIENT>'s reputation. Strategic partnerships with external groups may even present opportunities for cost-sharing of advertisement development and placement if the specific group is featured alongside the student.

Supplement advertising with media relations efforts to engage the community. Decide on a few key overarching messages for the year and pitch stories that reinforce <CLIENT>'s messaging throughout the year to create deeper understanding.

Consider increasing earned media efforts to enhance <CLIENT>'s position within the local market. Proactively pitch stories that tie back to <CLIENT>'s key messaging to elevate beyond simple brand awareness.

Pursue increased coverage of <CLIENT> within local publications such as the Houston Chronicle through the elevation of the <OFFICE>'s earned media strategies.

Systemize a process to trumpet and share major achievements such as the University's pivot to begin enrolling undergraduate students, its completion of Hunter Hall, and the

aforementioned groundbreaking international partnerships plan throughout external media partners.

Address gaps between current and ideal external coverage of <CLIENT> through augmenting expanded earned media strategies with greater insight into notable stories and successes shared throughout the campus community.

Put dedicated strategies and plans in place to market <CLIENT> to prospective student audiences as both a four-year solution as well as transfer destination given the unique relationship the University possesses with local community colleges which exist as both feeder institutions as well as direct competitors. Assist the Office of Enrollment Management with keeping this reality in mind when constructing its competitive disruption strategies. Ideally, develop <OFFICE>'s marketing plan and the Office of Enrollment Management's competitive disruption strategy in parallel to and as complements to each other.

Review enrollment data to identify those undergraduate institutions from which recent alumni enroll in <CLIENT>'s graduate programs. Define a meaningful threshold of enrollments that can be used to determine which institutions should be treated as feeder institutions. Focus outreach, recruitment programming, and marketing efforts on those institutions that meet the threshold.

[SECTION] SECTION 6: POWER DYNAMICS RECOMMENDATIONS

Recommendations

POWER DYNAMICS HOLISTIC

Pursue a stronger culture of accountability throughout the <CLIENT> campus community through clearly defining processes, roles and responsibilities, and expectations, and then holding all parties to established standards of adherence. Repeatedly prioritize, complete, and deliver promised solutions as defined by higher-level strategic plans to nurture budding trust in each group's capabilities and expertise over time.

Realize the long-term benefits to the stewardship of <CLIENT>'s brand reputation, measured in efficiency and sustainability, facilitated by a new reliance on the marketing and communications functions for strategic leadership and reputation management.

Foster the emergence of healthy power dynamics through efforts to ensure that the entire campus community collectively defines and then acts in accordance with the new rules of engagement following the centralization of the marketing and communications function.

Relegate the address of those power dynamics at play between the University and other entities throughout the world to future iterations of the "Impact 2025 and Beyond" strategic plan in realization that such macro-forces may be out of the purview of the <OFFICE>. An exception should be made in instances where the gradual shifting of outward reputation or position within the market may shift University-level power dynamics.

Decentralize the web content development process, assigning a dedicated administrator in certain offices, such as Enrollment Management, to manage this in liaison with the <OFFICE>-based web team.

- Option 1: Hire and train student workers to handle the simple lower-level web updates and requests.

- Option 2: Train a select number of dedicated subject matter expert content managers in top-level groups to manage and edit their college, program, or function's web content.

As part of this rebalancing, develop and implement certification, training, and recertification processes that prevent rogue behavior.

- Option 3: Create a system that allows for quicker updating of a site.

Work with Administrative Leadership on an annual basis to determine and assign strategic partnerships and sub-departmental reporting structures to key revenue generators such as Advancement, Enrollment Management, etc. according to an agreed-upon model like the 3Rs framework.

Launch annual planning efforts alongside enrollment and marketing planning within each department.

Invite campus groups to partner with the <OFFICE> to market programs and initiatives as guided by established priority levels present within the "Impact 2025 and Beyond" strategic plan.

Work through partnership prioritization levels to understand their impact on each group, institutional priorities, and the overall marketing plan itself.

Clearly communicate such decisions as a way to empower all levels of the organization while still retaining the ability to make the ultimate decisions at the cabinet level.

Determine the role of the marketing plan and its importance within the larger strategic and financial plans.

Delineate clear do's and don'ts of working and existing within the new marketing infrastructure. Continue to drive the need and understanding of existing and evolving processes to best serve <CLIENT> as a whole.

Codify precisely what the <OFFICE> is supposed to do as a function of its role for the University and what it is supposed to do in supporting other partner groups as part of efforts to reposition the Office to be renowned for its strategic capabilities.

INTERNALLY-DEFINED

Continue striving to create the desired power dynamic structure in which the <OFFICE> is, at the highest level:

- Collectively, and as individuals, renowned for its strategic capabilities,
- Able to act as strategists and develop and guide a communications or marketing strategy in tandem with an institutional partner's goals.
    - Level up those soft and hard skills present within the Office and develop stronger relationships with partners in order to do so.
- Worthy of a reputation for being a disruptive force on campus, and among higher education itself.

Drive a perception of the <OFFICE> as brand experts, not gatekeepers through an emphasis on ongoing professional development. At a structural and strategic level, establish <OFFICE> as an internal marketing agency, focused on providing strategic marketing leadership and planning for the enterprise. This will be a shift away from the current model of reactionary service provider and require:

- Short- and long-term strategic planning across <CLIENT> to establish priority analysis and decision making in-step with enterprise-wide planning and strategic initiatives.
- Prioritization of key, strategic enterprise and departmental marketing needs that elevate reputation and drive recruitment.

- Engagement with personnel across campus to provide the training and strategic perspective to utilize self-service tools for communications that are not within priority purview.
- Establish consistent internal channels for project requests with parameters and protocols that are communicated effectively across the organization to facilitate project in-take and planning. These steps, instituted over time, will unify the <OFFICE> with all of the necessary stakeholders within <CLIENT>, align its work with enterprise strategic planning, and position it to provide the marketing leadership and expertise to drive reputation through on-personality storytelling.

Harness the recommended strategic planning processes defined within the Appendix to shift existing power dynamics from an "Ask" model to one in which the majority of campus groups approach the <OFFICE> with goals rather than asks and tasks.

Minimize those inefficiencies and discontent that result from an "Ask" model through the evolution to one driven by strategic partnerships where both partners work towards the same goals using a strategy and tactics developed collaboratively.

Adopt a more rigorous process and publicized timeline standards for project submissions, approvals, and denials that must be followed in order for work to be done by the <OFFICE>. Ensure the to-be-filled Assistant Director of Creative Services role has the control to enforce these standards and order projects according to priorities.

Develop a clear model of strategic partnerships grounded within the recommended new annual planning processes (refer to Appendix I) to foster greater integration and alignment between the <OFFICE> and partners such as Enrollment Management, Academic Affairs, etc.

Help faculty understand the tone, approach, and style that should be used when explaining programs through the launch of the recommended reputation and messaging platform, editorial guidelines, and a willingness to work with each faculty member on a one-on-one basis.

Systematize training through an initial pilot program with a specific college or program that assesses its needs and goals, identifies new and better stories to tell, and devises a communications plan. Incorporate any lessons learned from such a pilot into the approach and curriculum and replicate the program throughout all colleges and programs.

Meet with a majority of University units to spread knowledge sharing and common understanding of the current role of the <OFFICE>, its goals and priorities, and how it can elevate institutional reputation and promote individual departments and colleges through its new strategic leadership position.

Utilize this time to help University leaders understand the importance of transitioning out of historically reactionary service-orientated models to equip the University to effectively communicate within today's markets. Continue demonstrating the <OFFICE>'s added value.

Initiate an awareness campaign to inform key community leaders and influencers of the actual capacity and capabilities of the <OFFICE> given real and projected resources, especially in times of limited resources or compression.

Embark on a listening campaign to meet with key community leaders and influencers to facilitate understanding within <OFFICE> leadership as to their priorities, marketing needs, and capacity for healthy partnerships with the Office. Leverage findings to then inform and guide each relationship.

Hold accountable those parties that violate the established timeline or operating procedures to better position the <OFFICE> to operate with the efficient and streamlined strategic agency model it is working to build.

Minimize any unintentional variance in the standards campus constituents are held to and begin enforcing processes and standards to drive down any decrease in team morale or quality of projects undertaken.

Focus <OFFICE> capabilities on key revenue-generating or reputation-driven priority projects and arrange for its involvement with projects to begin in their beginning strategic phases.

Prioritize <OFFICE> staff time on communications with the greatest impact on institutional narrative and brand awareness, establishing the story and style for others to follow.

Develop and make available to the whole campus a suite of fully fledged downloadable templates, inclusive of both InDesign and word processing files, to reduce custom-designed, low-level collateral projects done by the <OFFICE>'s Graphic Artists. Mandate self-service usage of these templates both internal to the <OFFICE> and among the campus at large for the quick editing and adding of content of low-priority, high-frequency activities.

Champion an internal commitment to the new model of <OFFICE> as the strategic campus leader for marketing and communication efforts.

Long-term, implement a dotted line reporting structure to key partners such as Advancement and Admission.

Share marquee pieces with the larger campus as examples of the Office's strategic expertise and cross-functional leverage.

EXTERNALLY DEFINED

Document and distribute "Roles, Responsibilities, Accountabilities, and Authorities (R2A2s)" and deploy level-setting efforts to eliminate any confusion and inaccurate perceptions around the individual values and expertise each group brings to the University's work.

When inviting faculty and academic leaders to centralize around and in support of new strategies and initiatives, explicitly demonstrate the intentionality underlying any approach, highlighting differences with historically ineffective approaches.

More widely communicate the strategic ways in which the <OFFICE> is not only acting against basic marketing tactics and harvesting low hanging fruit, but also against advanced initiatives to increase faith in the Office's abilities and expertise.

Equip the <OFFICE> with the expertise necessary to strategically lead through proper investment in necessary personal development, continuing education, cross-training, and recruitment to rise to expectations to both know the intricacies of marketing and develop strategic marketing plans.

Increasingly solicit growing faith in the <OFFICE> to minimize any risks of failed partnerships, unhealthy power dynamics, and harm to the University's culture, reputation, and recruitment and revenue generation efforts.

[SECTION] SECTION 7: PROCESSES RECOMMENDATIONS

Recommendations

PROCESSES HOLISTIC

Realize that an evolution from the current organic state of all of the <OFFICE>'s content development processes to a clearly defined ideal state offers <CLIENT> the most direct potential to actualize its intended visions and aspirations.

Redesign the project request and intake process — whether through a platform such as SharePoint or self-constructed — to include the collection and review of key project or campaign goals and audience, historic and contextual information prior to implementation. Frequently publish and share timeline requirements and protocols with the <CLIENT> community for <OFFICE> project requests. This will help to ensure all projects obtain proper approval, are filtered according to their low or high value, and ensure information and resources are distributed in a manner that gives team members the opportunity to prioritize their work successfully.

Define a clear process with identified roles and responsibilities for both internal Office team members and external partners and communicators campus-wide.

Institute capacity management and resource planning initiatives, both on the annual and quarterly time frames, to level workloads and minimize any pressures that may result in burnout.

Educate the campus community regarding the establishment and reasoning for processes, timelines, and prioritization of the projects introduced by the <OFFICE>.

Leverage existing and future editorial calendars cross-functionally within the <OFFICE>.

MARKETING-EXECUTED PROJECTS

Hold the Office of Enrollment Management accountable for the provision of timelines, plans, and other material assets that will enable the <OFFICE> to gain a full sense of the ebb and flow of enrollment trends and construct a forecast around annual marketing cycles.

Bring the full Office together in the creation of strategic annual communication plans to build the universal vision and buy-in necessary to effectively drive execution against strategy.

Ensure that the codified process for communications execution aligns with all institutional goals and relies upon data analysis to drive clearer decision-making.

Harness the strategic annual communication plans as a system by which to measure tactics year to year and drive annual amendments and improvements.

Codify ideal processes and systems with the aspiration to drive greater collaboration and strategy, introduce new checks and balances to ensure greater quality control and assurance measures, and enable the Office to prioritize and execute upon projects in service of predefined partnerships.

Recognize that the creation, adherence to, and training required by the introduction of any new process takes time. Include the necessity to both develop, roll out, and execute against the process itself while training the campus in its use within any resource forecasting efforts to minimize the process's ability to lengthen the development time of projects.

Create client briefs —or their equivalent —per project to facilitate knowledge transfer and timelines.

Restructure internal meetings to be more dynamic and useful for those involved and include the definition of clear action items, next steps, and accountability at the conclusion of each.

Give creators (as defined within the <OFFICE>) the freedom to create 'focus blocks' in their schedule/calendar to dive into the work of creating interruption-free.

Exhaust every possibility in attempting to ensure the entire team cohabitates the same space on campus.
- If this is not possible due to logistical reasons, leverage video conferencing tools like Zoom and Slack to drive collaboration.

Introduce quality assurance and control phases within the final content development process through the creation of ad-hoc or formal quality control and editorial teams.

Split roles with dual domains into their requisite function areas.

SELF-SERVE PROJECTS

Expand upon present efforts to develop communications capabilities outside the <OFFICE> by leveraging well established tools and the recommended communications portal through regular and ongoing brand and messaging training for all University staff.

Build upon the momentum gained from and the model of the groundbreaking retreat on branding, positioning, and marketing held last Thanksgiving to create communications camps, social media camps, and brand positioning camps. Connect these camps to the work of the annual planning process to support the campus community in differentiating between <OFFICE> priorities and those communications that might be best addressed through a robust set of brand resources.

Expand existing self-service tools into a robust storytelling and communication portal in which members of the <CLIENT> community can easily find messaging standards, templates, logos, and style guidelines.

Reconsider potentially more efficient review structures that can minimize the brand guide approval period and eliminate a perceived bottleneck within this otherwise effective process.

PRIMARY PROJECT CENTERS

PLANNING:

Require that short – and long-term strategic communications planning occurs at all levels and involves leadership across the University so that priority strategies and decision-making can occur in-step with enterprise-wide planning and strategic initiatives.

Create an annual marketing and communications plan for the University by implementing the collaborative annual planning process guide found in the Appendix in a way that engages all key stakeholders along with the <OFFICE> in its development and approval.

Establish, at a minimum, an annual, and ideally quarterly, planning meeting with key stakeholders.

WEBSITE:

Consider any efforts to improve the end-user experience as mission critical given the critical role websites play in all digital strategy, and the high volume of website traffic visiting <CLIENT>'s website.

Prioritize update efforts, redesigns, and ongoing management according to three focus centers:

- Those that provide more compelling and personality-driven content while simultaneously shifting general program and any necessarily fact-based information to secondary and tertiary pages.
  - Invest in more robust navigation structures that surface appropriate content and destinations in as few actions as possible.
- Those that ensure the University is operating a current, responsive, and consistent website in an increasingly digital and mobile world.
- Those that enhance user functionality and brand standards integration.

Develop a calendar for semi-continuous website redesign, developing internal deadlines throughout the year that can guide website updates to ensure content remains current and mitigate any overwhelming resource burden presented when redesigning an entire website.

Include all website content on a five-year editorial calendar, such that each year, as part of the University's annual communications plan, an assigned portion of the website receives content revisions. This will ensure content remains current and minimizes major resource requirements stemming from any need to completely overhaul the website in the future.

Engage key stakeholders and offices institution-wide in website best practices, establishing the strategic centrality of consistent user experience and how every program and office will benefit from a fully integrated and easily navigated website for end-users.

Immediately ensure that the homepage, campaign landing pages, or any other specific URL included in marketing or communications collateral tells some compelling and emotive story. Deliver authentic narrative, video, and imagery in a more emotive tone to help draw audiences in and start to build those connections that lead to affinity.

Develop unique landing pages for each program as resources allow so that campaigns lead directly to specific pages that enable campaign metrics to be tracked.

Focus the main website homepage on sharing emotive and personality-infused stories that speak to why a prospective student should consider <CLIENT>. Locate specific program, administrative details, and other logistical information on easy to find subsidiary pages.

As resources allow, strive toward a program subpage structure that includes the following: program overview, alumni stories and outcomes, current student stories focused on internship and career opportunities, as well as faculty and curricula introductions.

Develop unique subsidiary pages for each program that contain student stories as well as emotive imagery and videos that make a compelling case for the unique value proposition offered within individual programs.

Develop a content strategy for individual programs that continues to expand in recognition of the reality that increased content directly correlates to improved SEO outcomes.

Elevate and empower uniformed standards to be implemented across every single webpage institution-wide. Engage additional resources as necessary to improve functionality.

Introduce greater transparency around website content development so that subject matter experts and content creators for each program or function can gain necessary insight into the strategic rationale underpinning <OFFICE> made changes. Use the

occasions where heavy revisions are necessary to illustrate why content must be changed for branding (tone, style, voice, digestibility), digital (web optimization, SEO, etc,), or other reasons.

Explore ways to cater to the widespread desire for greater speed in the enacting of website updates and greater access/editing capacity while fostering greater insight into position within any approval queue, minimizing the perception that a single web administrator possesses the permission to publish content, and ending any attempts to bypass the process through the use of employees external to the <OFFICE>.

Prioritize the identification and support of those with a genuine need to regularly update website information, consolidation of total users, and adherence to the current extensive website guidelines as informed by the forthcoming messaging platform.

Archive or remove any outdated information present across all webpages to ensure user experience continuity and prioritize the addition of new content. Define new content creation processes that adhere to an inbound marketing vision that aspires to advance <CLIENT>'s reputation.

Deploy best-in-class inbound strategies through content update processes that gather data around questions posed by prospective students, build content answering frequent questions to increase website traffic and program awareness and establish <CLIENT> itself as an authority within the academic landscape.

Perform keyword research for specific academic offerings with the end goal of developing a list of topics that can guide new content generation. Develop content which answers those questions most frequently searched for to build trust with users and increase traffic volume.

Perform keyword research on a regular basis to identify opportunities for new site content that drives more organic traffic. Ensure the University's SEO strategy includes the posting of fresh and optimized content consistently.

Ensure keywords appear in both the appropriate places on the page and in the appropriate formats. Utilize elements like header tags and links to maximize both visibility and user experience.

Optimize existing web pages for the most qualified and searched for keywords. Include both backend metadata, as well as on-page content within such optimization efforts.

Utilize Google Analytics to identify graduate pages with the most and least amount of web traffic. Ensure high-traffic pages offer the greatest value and prominent CTA opportunities. Develop content strategies for increasing traffic to low-volume pages.

Use Google Analytics to identify the highest-searched words or phrases that are found on the <CLIENT> website. Review the results of internal keyword searches and adjust accordingly to ensure high-value returns.

Recognize that effective SEO is an ongoing process and regularly conduct keyword research and adjust content based upon findings.

Prioritize the removal of outdated documents from the system website to drive improvements in SEO and remove any liability inherent in individuals referencing outdated manuals, procedures, etc.

Prioritize the improvement of SEO practices, requiring ongoing customized efforts to remain current.

Ensure website content makes use of headers which break up large content blocks and help guide the reader through the story and information provided. Ensure headers include targeted keywords.

Allocate additional resources as necessary to bring the University's website into consistent branding, user-friendly navigation, mobile responsiveness, and current content. In an increasingly digital and mobile world, a current, responsive, and consistent website is absolutely essential.

Confirm all imagery and videos employed throughout the website adhere to the same tone, style, and feel.

Archive and remove from the active website any outdated news articles and temporary pages. Create backchannels or library archives for news events that communicators may access when necessary.

Develop a process by which web pages designed for single-instance events are regularly archived and removed from the active website.

SOCIAL:

STORYTELLING:

Consider the intentional design of processes capable of organically soliciting authentic stories from the campus community an institutional imperative.

Evolve current organic story collection processes in ways that introduce more regularity to provide the <OFFICE> with an increasing amount of fodder from which to source reputation furthering narratives.

<END>