



The 5 Principles Institutional Leaders Need To Drive Recruitment and Retention Across The Campus

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Executive Summary

This report offers practical recommendations for successfully implementing five principles that will drive recruitment and retention success across your campus.

Having a clear, deep understanding of your target audience will provide you with the insight you need to offer the right programs and services, at the right prices and via the right channels (classroom, online, blended).

Having a clear, deep understanding of your competition will provide you with the insight you need to know in order to differentiate your institution from others which, in turn, makes it easier for your audience to understand why your institution is their best opportunity. This will help you focus on what the audience values and what your competition does poorly or not at all.

Having your entire leadership team, across the institution, involved in the development and implementation of the strategic plan increases your ability to leverage all of your unique strengths and resources. And the involvement and buy-in of the plan avoids a common pitfall – lack of support of someone else’s plan, also known as the “It’s not my fault.”

Having a process in place for constantly monitoring the market, the audience, the competition and your own institution helps you identify opportunities and threats. And having a process in place for evaluating those ‘shiny objects’ or ‘unplanned obstacles’ can keep you ahead in the market as well as on track for success.

Introduction

We live in interesting times.

Budget shortfalls. Funding cutbacks at the state and federal level.

Enrollments are down. Competition for students has increased.

The sluggish economy of the past few years has produced increased price sensitivity, a growing concern over student debt and great deal of conversation about the ‘value of higher education.’ And as the economy strengthens, more students will question the value of a formal education which will result in sluggish enrollments and increased attrition.

All of this raises many questions – but the bottom line is that you still need to achieve enrollment goals. Or, more importantly, you need to improve graduation rates. You need to increase referrals so that your cost to acquire successful students increase. And you need to ‘win back’ graduates so that you can be their primary source for life-long education.

So how can you better position your institution for success in today’s environment?

This report provides you with five time tested principles that can drive recruitment and retention across your campus – today, tomorrow and long into the future.

This report is divided into five main sections:

- ⇒ Principle 1: We are here to serve “_____”
- ⇒ Principle 2: We must offer unique, valuable programs and services to “_____”
- ⇒ Principle 3: We must all work together to consistently deliver the unique, valuable programs and services to “_____”
- ⇒ Principle 4: We must be vigilant – change happens
- ⇒ Principle 5: We must not be distracted by shiny objects.

Principle 1: We are here to serve “_____”

This first principle is a simple to explain, easy to understand and difficult to achieve. And it's the foundation upon which the other principles are built upon.

To start, we need to agree that every institution has limited resources as well as unique strengths and weaknesses that they need to leverage in order to achieve their goals. Too many try to do everything, be everything to everyone, and wind out stretched too thin, unable to take full advantage of some opportunities because they are chasing other opportunities that they will never catch.

This principle is about focus. Focusing on clearly identifiable segments of the population that you can consistently deliver unique, valuable solutions. Focusing on those that your institution can help achieve their educational goals today...and tomorrow.

By focusing on this audience, this target market, you will be attracting students that are most like your successful students. You will be focusing on students that enroll, graduate, refer and return for additional education over the course of their lives.

This requires a deep understanding of who is your 'successful' student – who they are, what they need and want, how they go about identifying and selecting a college or university, how they perceive your institution versus others and how their experience matches (and fails to match) their expectations.

How To Make It Happen

The first place to start is with your current student population. Your goal is to identify those students that are most successful so you can target others most like them and the key to your success is going to rest on your ability to dive deep and become detail oriented.

What are the key characteristics of a successful student at your institution? For example, in the past 18 months, you would consider data points such as:

Prior education

- High School GPA
- SAT Scores
- College GPA (if any, from other institutions)

And data from your own institution could include:

- Total Credit Hours
- Number of terms/semesters enrolled
- Grade Point Average
- Tuition Paid
- Remedial Services Used
- Dropped Courses
- Incomplete Courses
- Disciplinary Actions
- Other

Once you have gathered that data for all of your students, divide them into deciles and assign a number grade – ‘10’ for highest, ‘1’ for lowest. Once completed for all data points, rank by total points and those students in the top two deciles are ‘successful.’¹

The next step is to append data in order to gain a deeper insight. Services such as PRIZM (Claritas), ElementOne (Neustar) and Experian can provide the demographic, psychographic and other key data insights that will help you better understand your audience – and the size of your audience for recruitment purposes.

¹ We focused on the top two deciles in this example but depending on criteria, population and

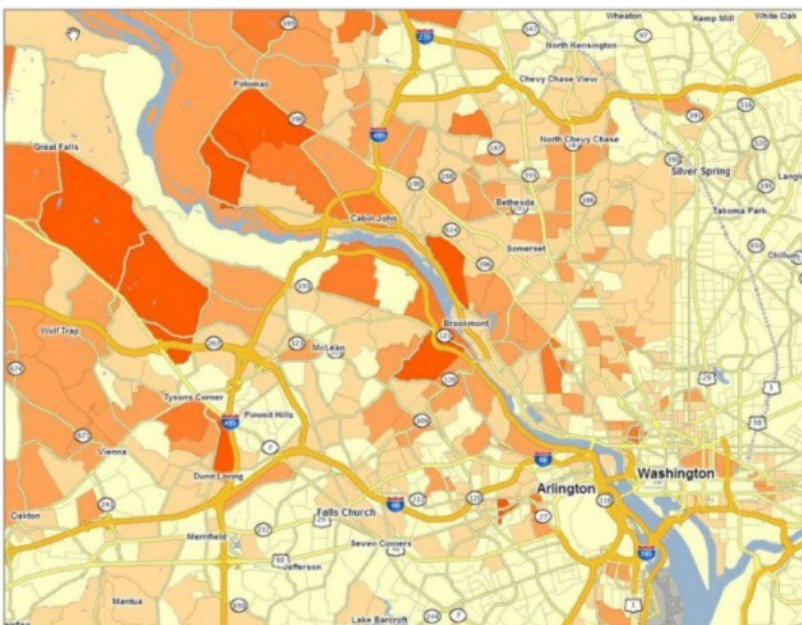


FIGURE 1 SCREENSHOT OF NET ASSET VALUE
HEAT MAP IN ELEMENTONE SHOWS WHERE
YOUR AUDIENCE IS LOCATED.
DOWNLOADED FROM [HTTP://
WWW.NEUSTAR.BIZ/INFOSERVICES/
RESOURCES/LITERATURE/NET-ASSET-VALUE-
ELEMENT-ONE#.UsWgnvRDuSo](http://WWW.NEUSTAR.BIZ/INFOSERVICES/RESOURCES/LITERATURE/NET-ASSET-VALUE-ELEMENT-ONE#.UsWgnvRDuSo) ON 1/2/14

The data that would be appended could include the following demographic, psychographic, behavioral and geographic elements:

- Household Income
- Ethnicity
- Gender
- Generation (Baby Boomers, Generation X, etc.)
- Occupation
- Religion
- Education
- Activity, Interest, Opinion (AIOs)
- Attitudes
- Values
- Behavior

Next, you will want to perform some additional research (telephone interviews, surveys, focus groups) in order to understand why these

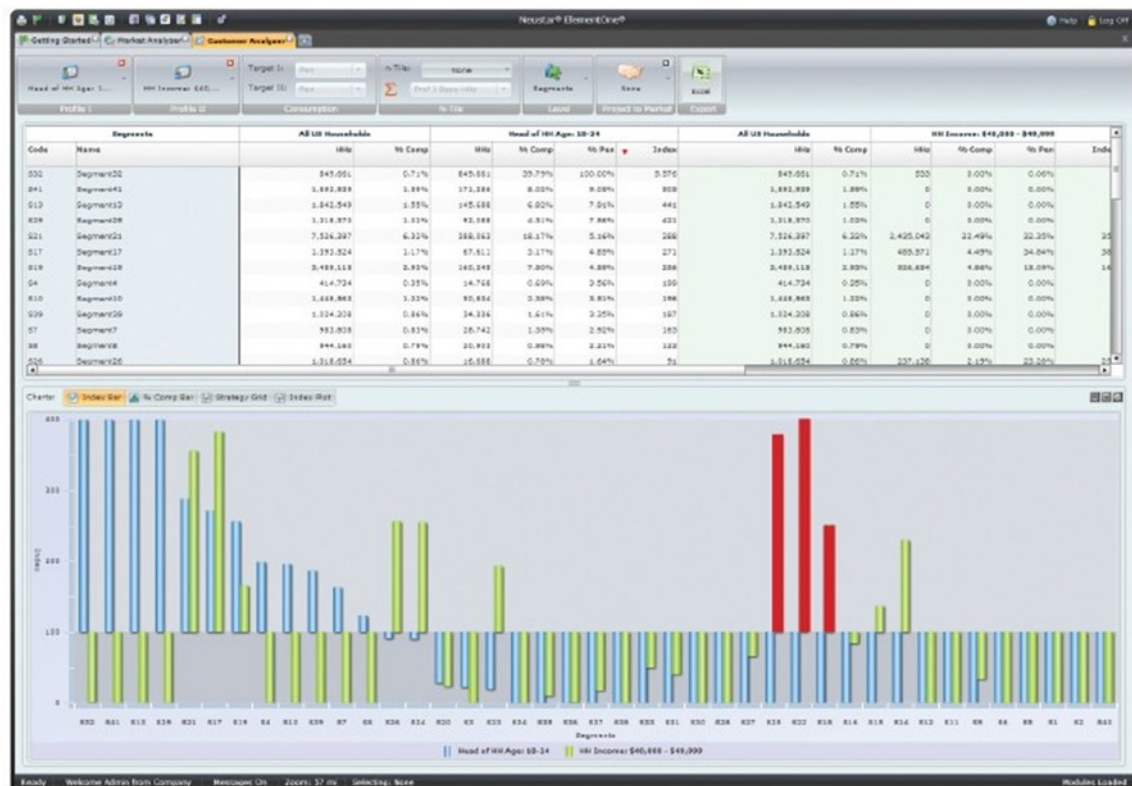


FIGURE 2 SEGMENTATION REPORT FROM ELEMENTONE (DOWNLOADED FROM [HTTP://WWW.NEUSTAR.BIZ/INFOSERVICES/RESOURCES/LITERATURE/SHARPEN-YOUR-MARKETING-SKILLS#.UsWhL_RDuSo](http://www.neustar.biz/infoservices/resources/literature/sharpen-your-marketing-skills#.UsWhL_RDuSo) ON 1/2/14)

successful students selected your institution and remained enrolled.
For example:

- What triggered your desire to go to college
- Who did you turn to for information on college
- What was your criteria for selecting a college
- What colleges did you consider? Why?
- Why did you select our institution?
- Why didn't you select the other institutions?
- Has our institution met or exceeded your expectations? How?
- Has our institution failed to meet your expectations? How?
- Would you recommend our institution to others?

Ask specific questions about the programs and services offered by your institution in order to understand the perceived value of these services.

At the end of this research, you need to be certain that your target



FIGURE 3 ELEMENT ONE TARGET GROUP SAMPLE PROFILE (DOWNLOADED FROM [HTTP://WWW.NEUSTAR.BIZ/INFOSERVICES/RESOURCES/LITERATURE/SHARPEN-YOUR-MARKETING-SKILLS#.UsWiLPRDuSo](http://www.neustar.biz/infoservices/resources/literature/sharpen-your-marketing-skills#.UsWiLPRDuSo) ON 1/2/14)

audience and segments are large enough to support your goals for the near and long-term. If not, select additional segments based on your research.

Remember that the segments of your target audience must be easy to identify and reach, and that they are in need of unique solutions that your institution can best provide. (That means you will also need to have a deep understanding of the competition – those that your audience identifies as ‘competition’ as well as those that you know, based on your experience, are also competitors. We will get into this in more detail under Principle 2.)

Once this has been completed, you will have the information you need to target your recruitment efforts on these segments of the market. The next step is to ensure that your offering is unique and valuable to them.

Principle 2: We must offer unique, valuable programs and services to “_____”

The devil, as they say, is in the details. The market research described earlier will provide you with some of the answers to this Principle from the perspective of your successful students (current) as well as ideal students (potential).

Next, you need to make certain that you are offering unique, valuable programs and services so that you eliminate or dramatically reduce the competition. This requires a competitive analysis as well as market needs assessment which will help you identify the perceived value of your offerings with key audiences such as faculty, staff, alumni, corporations, NGOs, and government agencies. Faculty, staff and alumni will help focus on your institution's strengths and weaknesses, while corporations, NGOs and government agencies can help address opportunities and threats.

The work performed here will provide you with the insight you need to add new programs and services, eliminate programs and services and improve programs and services. Additionally, this work provides you with insight necessary to develop stronger messaging and offers that will appeal to your target audience/segments as they move through their decision making process.

How To Make It Happen

A competitive intelligence (CI) effort is an organizational commitment – which means you need to involve key members of your faculty and staff from across the institution. A common mistake is to make this a ‘marketing project’ and a one-time deal and some of the major reasons for avoiding this include leveraging the expertise within the institution to gaining support and buy-in to the findings and recommendations.

Competitive intelligence programs are not a ‘marketing responsibility’ because the work will impact every area and function within your institution. So when building your CI Team, make sure all areas are represented and that you invite key personnel to participate. However, marketing should be the central collector, administrator and/or analyzer of the data.

Together, you will work on answering these questions:

- What questions do we need to answer?
- Where can we find quality data and insight?
- Who is responsible for gathering and analyzing the data?
- How will recommendations be developed and shared across the institution?

The areas that you might wish to study are:

- Institution Overview
- Target Audience(s)
 - Programs and Services (Programs would include degree programs by Undergraduate, Graduate and/or Doctoral; Certificates and Certification. Services include advisement, remedial, tutoring, etc.)
 - Pricing
 - Distribution (Classroom/Campus, Online, Blended)
 - Promotion
 - Financials
 - Human Resources

At the end of this initial phase, your CI team will know what questions need to be answered, what data is necessary to answer the questions, what sources of information will be used and are acceptable and where the data will be stored for analysis and the development of recommendations.

Since CI is an on-going process, you will want to schedule a regular schedule for gathering, analyzing, recommending and reviewing the performance of decisions made by the CI team.

The Market Needs Assessment (MNA) is a research process for understanding what your audiences need, want, expect and perceive. This could include prospective students, current students, former students, as well as professional associations and community leaders at nearby corporations, NGOs and government agencies. Including professional associations and community leaders will provide you with insight into what your programs and services will need to address in order to meet future needs in the market. This is also an on-going process that enables you to test new ideas, identify developing trends and be better prepared to provide appropriate solutions and alternatives as things change in the market.

Principle 3: We must all work together to consistently deliver the unique, valuable programs and services to “_____”

It does take a village. Success, that is. Too many think recruitment belongs to enrollment management and retention belongs to the faculty – and they are, sadly, mistaken.

Consistently delivering a unique, valuable experience inside and outside the classroom requires your entire organization – faculty and staff – to be on the same page, focused on doing what they need to do down to the individual level. This requires involvement in the planning process so that strengths and weaknesses are clearly understood and that the agreed upon action plan plays to your strengths and is understood by all.

Or, in other words, it means that you no longer let enrollment management create the recruitment plan that fails to include input and buy-in from admissions, financial aid, housing, security....

Why? Because a 20% increase in enrollments at a time where other departments are reeling from hiring freezes and budget freezes that have them understaffed and trying to make outdated technology fill in the blanks is a recipe for disaster.

How To Make It Happen

Once the audience research, competitive intelligence and market needs assessment has been completed, it's time to share the findings with the key leadership and start working on the action plan.

This strategic planning session should be off-site and with everyone unplugged. You need everyone's undivided attention and, to be perfectly honest, if a member of the leadership team can't be away from the office, you have another issue to address.

The rules for the planning session are simple – everyone needs to be involved and focused. Some will want to multi-task and spend time on their laptops, tablets and/or smartphones in an attempt to manage daily responsibilities. The best way to prevent this from happening is to confiscate these devices and pass out pen and paper – depending on your audience. But the bottom line is that you need to be prepared to address this issue in order to ensure the success of the session.

During the session, it is common to identify gaps in your knowledge and understanding of the market, the competition, your audience as well as your own organization. When this occurs, you should create an action plan for additional research which may include focus groups, interviews, surveys, and secret shopping.

Principle 4: We Must Be Vigilant – Change Happens

The previous three principles feature on-going tasks. None of what we discuss here today is a single, one-off assignment because things will change and you need to stay on top of your ideal students, what they value, what your competition is doing and more.

Change is a constant both in your internal and external environments. Changes in the external environment often present new opportunities and new ways to reach the objectives. An environmental scan is performed to identify the available opportunities.

How To Make IT Happen

Market research, competitive intelligence, market needs assessments are on-going activities because change will happen and you need to be as prepared as possible so you can respond with an appropriate solution in a timely manner rather than react and hope. That is why external and internal environmental scans are critical

The external environmental scan has two aspects: the macro-environment that affects all organizations and a micro-environment that affects only the educational institutions in a particular niche. The macro-environmental analysis includes political, economic, social, and technological factors and sometimes is referred to as a PEST analysis. The number of factors you can track is practically limitless, so you need to prioritize and monitor those factors that have the greatest impact on higher education.

Examples may include:

- The possible impact of political (governmental) changes on funding, accreditation and audience served;
- The possible impact of a strong or weak economy;
- The possible impact of society's perceived value of higher education and the impact of financing (taking on debt);
- The possible impact of existing and new or developing technology on all aspects of the audience's interaction with your institution. For example, the impact of mobile devices on recruitment (website development, emails, course delivery).

Additionally, the institution must know its own capabilities and limitations in order to select the opportunities that it can pursue with a higher probability of

Political	Economic	Social	Technological
• Political stability • Tax Law • Employment Law • Accreditation • Funding • Other	• State of the economy • Interest Rates • Inflation Rate • Employment	• Role of higher education in society • Population Growth Rate	• Rate of technological change • Recent technological developments

FIGURE 4 PEST ANALYSIS TEMPLATE

success. The situation analysis therefore involves an analysis of the internal environment.

The internal analysis considers the situation within the institution itself, such as:

- Culture
- Image
- Organizational structure
- Key staff
- Access to natural resources
- Position on the experience curve
- Operational efficiency
- Operational capacity
- Brand awareness
- Market share
- Financial resources
- Exclusive offerings and/or relationships
- Copyrights, Patents and trade secrets

A situation analysis can generate a large amount of information, much of which is not particularly relevant to strategy formulation. To make the information more manageable, it sometimes is useful to categorize the internal factors of the firm as strengths and weaknesses, and the external environmental factors as opportunities and threats. Such an analysis often is referred to as a SWOT analysis.

This is also where standardized reports and communication across the institution is key.

SWOT Analysis Worksheet

Use a SWOT analysis to identify the strengths, weaknesses, opportunities and threats relative to your company, unit or group, or a program you want to evaluate. The SWOT analysis lets you focus on specific areas and discover actions that can help you build upon your strengths, minimize or eliminate weaknesses, maximize opportunities and deal with or overcome threats.

Date of Analysis: _____

What is being analyzed: _____

Strengths

Ideas for building upon these strengths

Weaknesses

Ideas for minimizing or repairing these weaknesses

External Analysis

List factors external to what is being analyzed such as customer or marketplace needs

Opportunities

List ideas for investigating or taking advantage of these opportunities

Threats

Ideas for minimizing for overcoming these threats.

Principle 5: We Must Not Be Distracted by 'Shiny Objects'

“Shiny Object Syndrome”, SOS, is a very real and crippling malady in the world today thanks to our rapidly changing and highly competitive world. It is the ‘great new opportunity’ – sometimes real and sometimes imagined – that presents itself when an institution has intelligent, creative individuals that are looking for ‘a better way to achieve the organization’s goals’. (Or, sometimes, ‘a better way to achieve their own personal goals.’)

The results of these opportunities can be confusion, loss of focus, and trying to accomplish too much with your limited resources. All too often, these are opportunities that do not align with your strengths.

How To Make It Happen

Opportunities will arise and some of them will look too good to be true. That’s fine – but have a specific process in place for presenting and evaluating these opportunities. Remember to use data to drive your decisions and remember to keep asking yourself “How does this provide more unique value to our ideal students?”

Remember that your strategic action plan has been developed with the input of your key leadership team and is based on the best data and insight available at the time. There really is no solid reason to second guess the plan – but there is a need to evaluate new opportunities so your leadership team can make a decision to modify the plan, if they deem it to be appropriate.

The review process can be fairly easy to implement because you have already clearly defined your goals and motivation. Simply put, new opportunities need to be weighed against existing goals.

- Does the new opportunity put you closer to your goal faster than your current path or does it take you in a slightly different direction?

- Why is the shiny object attractive?

- How does that reason align with your previously defined motivations?

- What are the costs of abandoning (or diverting resources from) your existing plans?

Establish a team that evaluates these new opportunities and will make recommendations to the larger leadership team on how to modify the existing strategic plan, if appropriate. And if approved, be certain to clearly communicate the reasons for the change as well as the details concerning

how the change will be implemented across your institution so that everyone is onboard.

Modifying your strategic plan is not a bad thing if it is well thought out and planned – but it should be a rare occurrence that comes about from significant changes in the market, your organization, or with your audience or competition. Don't allow hard work or actual results that are slower to achieve than projected cause your leadership team to drive change based on fear – this process for evaluating and possibly modifying your strategic plan should focus on data and insight rather than emotions.

How to use this report

The information in this report can help you identify ways to improve your current strategic planning process as it impacts the recruitment and retention of successful students at your institution. These recommendations can help your institution work much more effectively and efficiently because they are data-driven with critical input from your audience, your market and your competition – as well as your leadership team.

Some of the recommendations can be addressed by current staff, using existing resources, but many are best handled with the guidance and assistance of experienced outsiders. This is especially true when your institution has never attempted to develop a strategic plan with leaders from across the institution and would be facing a situation where position and personalities might drive the efforts towards options that are focused more on personal agendas and assumption rather than data-driven insights on what the audience views as a unique, valuable solution.

If you have any questions after reading this document, or if you would like to explore ways that we can help you through this process, please contact Pat McGraw at 410-977-7355.

About The Author

Pat McGraw has helped colleges, universities and businesses serving the education sector develop and execute more effective ways to attract and retain successful students as well as clients. His expertise in market research, competitive intelligence, data analysis and strategic planning combined with sales and marketing operations allows him to provide clients with insightful, data-driven go-to-market plans that consistently achieve key organizational goals and objectives.

His work has helped institutions improve targeting in order to attract and retain successful students – and this work includes addressing program and service offerings, pricing, and promotion aimed at traditional and non-traditional students seeking classroom, online and blended educational experiences.

Pat's work has helped institutions such as University of Maryland University College, Walden University, Kendall College, Greenville College as well as leading businesses serving the education sector such as Blackboard, Noel Levitz, Education Dynamics and others.

Pat is currently a principal with DWS Associates, a leading research and marketing services firm with more than 75-years of experience serving small, medium and large organizations in the education, technology, retail and business services sectors. Additionally, Pat is the founder of mcgraw | marketing, a research and data-driven strategic marketing firm, and advises businesses such as Eduventures, Noel Levitz and Gilfus Education Group on select projects.