

Using a Marketing Audit to Set Directions for Results

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How effective are the marketing activities at your institution?

As you spend a typical day trying to balance your heavy workload, your initial response might be, “who has the time to create a major review to answer that question?” Yet, it is precisely because our time is so valuable that we periodically need to step back from the day-to-day operation and ask the questions that help us evaluate where we want to go, review what we are doing, what is working and what is not, so that we can better use our time and resources to give us the most effective marketing results.

A tool that enables us to do this is the marketing audit: a systematic, comprehensive review and analysis of our activities that leads to recommendations and actions to improve our marketing program. The outcomes of this report help us refocus our efforts on those things that are most important and give us the best results. In a busy office, that’s where we want to spend our time.

Organizing an audit

Before we discuss what areas of the college to look at and what marketing should encompass, let’s talk about how to organize the audit itself. What an audit does is help the institution analyze where it stands in each area of marketing, what its strengths, weaknesses, opportunities and threats (SWOT) are, and from this analysis and dialogue, determine recommendations for directions that will enhance the operation.

The audit can be done by an internal person or team, or an outside expert can work with this group to lead the effort. The leader, in either case, must obviously be someone knowledgeable, with expertise in higher education marketing, who can bring an objective view to the work of your institution.

The audit then needs to start with a look at the big picture, how your work fits into the overall directions of the institution and what you hope to accomplish. Ask how your marketing activities mesh with the college’s mission, goals and strategic plan? Then define what the marketing goals are (e.g. increase enrollment overall, or increase or change enrollment in certain programs, for certain target groups,) and are there some specific questions or issues you want to review (e.g. what is the image and what do you want it to be, how do and how should different campuses, departments of a complex institution relate in marketing).

Next, a list of the groups to be interviewed, or focus groups to be set up, should be determined and a list of questions designed for each. The audit leader then needs to listen in each group to determine what is happening, to hear recommendations from the

individuals involved and to gather information on which to make the final recommendations. Individuals need to be told they can speak freely, and that no comments will be attributed by name. Using an outside consultant who may be more likely to be viewed as objective and without an agenda to lead the interviews often makes it easier to get an open discussion.

Having worked with a number of different colleges and universities, I begin the audit process prior to a campus visit by first reviewing college materials and existing plans and talking with the contact person about what issues they see and what information they want out of the audit. I will then typically put together a two-day audit, meeting in one-hour sessions with about 10 different groups, including such areas as executive cabinet, program administrators, faculty, students, potential students, support staff, admissions, public relations/marketing/enrollment management, and community leaders.

In each group meeting, I begin with a very brief definition of the broad scope of marketing, indicate the purpose of the session is to hear their views on how the institution is doing or what it could be doing in marketing, image building etc. Then, I mostly listen. In some groups, the questions will differ depending on what their expertise is and their role in the marketing process. With students, for example, we'll want to know how they found out about the institution, what influenced their decision, what they like and dislike. With support staff, I often get some of my best information on how the institution really relates to students in fielding phone, mail and walk-in inquiries, and in developing operational processes that work or don't work well

What we're looking for

Once the process is set up, what do we want to find out? A simple, but actually great definition of marketing – “Define a need. Then fill it.”—may guide us in setting a perspective of what good marketing should encompass. Too often, marketing is viewed as little more than advertising and promotion. And when colleges and universities then do audits in this area –if they do them at all—they impose that same narrow perspective by limiting themselves to communications audits, rather than evaluating the full range of goals and activities that fall under a true marketing program.

What's included in the broader definition of marketing? As the attached marketing cycle diagram shows, marketing encompasses research; product, which is both curriculum, curriculum delivery and services; marketing communications; inquiry follow-up; retention and evaluation. The center of that circle is the customer. And good marketing is customer-driven, considering the customer's needs as we “define a need, then fill it,” rather than starting with our product and trying to figure out how to sell it. And a true marketing audit needs to consider what's working and what can be improved in each of these areas encompassing the full range of marketing components..

A review of the various areas around the marketing cycle reveals what a good marketing program should be doing, and helps us understand what we are trying to assess in the marketing audit.

Starting with research, we need to have concrete answers to such questions as what kinds of courses our students want, when and where they want them, what services are important, what they know about our institution, what image they have, how they heard about us, what they know and think of our competition? Equally important, we need research to identify a baseline so that we can later evaluate the effectiveness of our marketing efforts.

How we get these answers can vary, from sophisticated community demographic and perception studies to simpler focus groups we arrange on our own campus. Do we regularly ask our own students what made them choose our institution, how they found out? We should ask whether we log responses to such questions whenever we get a phone call or a postcard. Do we regularly analyze data we already have in the institution for its marketing implications? And once we get this research, how do we communicate it through our institution and how do we ensure that there is follow-up and change based on what the research reveals?

Once we have answers to some of the research questions, we can begin to shape a product that meets customer needs. Our product at an educational institution includes the curriculum and the services. How up to date, for example, are your career programs? Do graduates still get jobs, has the need for technology skills been built in, are you using professionals in the field as advisory committees? Beyond that, curriculum is more than just what courses we offer, although that is a basic factor. But beyond the course itself, where are you offering courses and when? Some institutions are looking beyond the campus to convenient off-campus sites in libraries, schools and even shopping malls. Today's technology makes courses by television, computers and the Internet realities as well.

Time is another factor. You can't, for example, expect to be successful at offering a course to small business owners if you plan to use a typical Monday, Wednesday, Friday at 10 a.m. timeslot for 18 weeks. Sites across the country are offering weekend colleges, considering early morning and late evening classes. A few colleges even have a 24-hour college, with courses at such hours as 2 a.m. to meet needs of factory workers coming off shifts. Others package programs with an intensive two-week block covering a semester, or other variations of accelerated learning.

Services to students are equally important. To the adult learner, it can sometimes be even more significant than the curriculum itself. Convenience is prime to an adult who has other life obligations, including work and family. Looking at your institution, how customer friendly is your registration, phone answering, counseling? Are you providing orientations for your own staff so they have the information to provide the right services? Do you provide other services once students are on campus to enhance retention, such as mentoring, early alert for problems, tutoring, advising?

Once the right courses and services are in place, we are in a position to develop our marketing communication tools. Promotion, which many see as the total marketing picture, is indeed an important piece of the picture. Here we consider our brochures, search pieces, ads, media relations--and in today's technology such aspects as home pages and interactive kiosks. And what we need to ask here first is are we getting the right message across to the right audiences and what image are we portraying? In creating and communicating the image we need to focus on the benefits to our customer, to emphasize our strong points and to do so honestly. The important thing in college selection is creating a good match. While some students would prefer a large, diverse university in a bustling urban setting, for example, to others the ideal college is a small, isolated setting, where everyone knows everyone. Finding your key benefits to stress should be based on research of what's important that blends with what you offer. Then look at your promotion pieces and ask what the headlines tell you, what benefits you've focused on, what the photos portray. If you're looking to reach adults or minority students, for example, are they included in your photos?

How are you reaching your audience beyond the printed word? What kinds of one-on-one contact are you making? Beyond college fairs, have you created a Speakers Bureau, are you at malls, county fairs, meetings of PTAs, are you visiting businesses and professional organizations? What kinds of tours, campus visits have you set up?

Another very important aspect of the marketing mix is how you are following up on inquiries. While some colleges are very good and indeed very sophisticated in qualifying leads and creating a system of follow-up, others admit to merely sending requested material and then actually throwing away the names of those people requesting information. The follow-up, however, can be pivotal in the final decision-making process. A good system, first of all, captures the name and how the person came into the system: through an ad, returning a brochure card, at a fair or open house. This information should become part of the final evaluation so you know what is working best and, therefore, what can be refined or continued, and equally importantly, what might be dropped. Since none of us have unlimited resources, we want to spend our time and dollars on those activities which give us the best results.

The follow-up also gives you an opportunity to convince your inquiries that the college really cares, really meets their specific needs. In a systematic way, you should be able to send sequential, segmented communications in writing and through a telemarketing program, with follow up phone calls. These calls should be designed to assist the potential student in taking the next step, whether that means signing up for a campus tour, an orientation program, filling out an application and eventually applying.

How well the institution is doing in each of these areas, and what recommendations there then are for improvement, will be determined through the audit group discussions. and then should be developed in a final written plan.

In addition to looking at each of these areas individually, the review also needs to consider how overall marketing planning is done at the institution. Does a written plan exist? Is there an organized, structure and format to make sure marketing ideas are developed from a broad base of personnel and then implemented and evaluated?

Creating the Marketing Plan and Team

Once the audit is complete, the next step is taking the information and recommendations and creating a marketing plan that will really be implemented. How do you do this in a complex college setting?

Since marketing is so inclusive, no one person or department will be totally responsible for every aspect. Therefore, the most effective marketing needs to become a team effort, regardless of which person or department is put in charge.

Having said that, and even believing that, however, is not enough unless you can truly institute a process and structure that enables the team to first understand what marketing encompasses and then to get involved, plan and -- most importantly -- implement the plans they create.

Having worked with dozens of colleges and universities to present workshops that help them create a marketing team and plan, I have yet to find any college where a group of faculty, staff and administrators, having been given an understanding of and framework for marketing, do not come up with creative, relevant, doable objectives to form the basis of a marketing plan that will bring concrete results in enrollment growth and student success.

The problem in most institutions is not a lack of ideas, but the lack of a structure to make those ideas really happen. We are all too busy doing our "real jobs" to take time out to implement these significant ideas. Further, most good marketing ideas require cutting across department lines. And even in the smallest institutions, people tend to stay in their own areas and don't have the time or opportunity to get together and communicate in person.

By using the group process, individuals from different departments are able to share their perspectives, which gives a stronger activity, and by doing so jointly they can agree to move forward. The marketing task force framework becomes an on-going, systematic operation and gives the authority for this cross-divisional activity to happen. Further, this process creates the "buy-in" and ownership that gives you an enthusiastic group, ready to move forward and see their ideas become reality.

While at many institutions a marketing task force is a small, representative group, I have successfully organized the process with a larger group of individuals, involving every area that impacts the marketing components. They are brought together to learn about marketing through a workshop setting. The large group then breaks into sub-committees around the marketing components to identify actual activities to implement the recommendations from the audit and their own workshop.

In these groups, they use some tested formats to develop written plans with

realistic, measurable activities with identification of persons responsible for implementation and time frames that can and will be evaluated. *This is perhaps the most critical part of the plan.* Much of the cynicism encountered at institutions is because planning often becomes an end: the great plan that stays on a shelf and the great ideas that never get acted upon. By assigning names and timelines, and a system to monitor these, your plan becomes an action plan that will be implemented and evaluated.

Audits are an important tool to help us periodically analyze our marketing efforts and then create and revise marketing approaches to get results that enable our institutions to meet the educational needs of our target markets. It's an important part of our planning as we constantly change and improve to meet an era of changing times and shifting demographics.

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