INTERNAL ASSESSMENTS QUESTIONS WORKSHEET

The OpenEDU Model will guide you through a massive decision tree. The following checklist ensures that you ask the right questions for each module, keeping you on the right path toward a strategic marketing plan.

INPUTS

1. BUDGET

- How much was approved for the current fiscal year?

- How much has been spent, and what is committed for the rest of the year?

- How much is in the budget for the next fiscal year?

- Are there good internal resources available for graphic design, programming, copywriting, social media, videography, public relations, or photography?

- Are there any budget items scheduled for other things (social media, web development, marketing redesigns, etc.) that you can roll into this effort?

- Will there be enough money to do a sustained push? Or will there only be enough to stagger a showing?

2. TIME

- When is the next recruitment cycle in full swing?

- When is the campaign expected to launch?

- When do you expect to measure results?

- When will admissions be ready to take on an influx of inquiries?

- When will the school be staffed to take on the new students?

- Are there any national or religious holidays when you should push or pause marketing?

3. GOAL

- What, specifically, needs to be accomplished in the short term?

- Are there any sub-goals to consider?

- How will you measure success?

4. BRAND(ING)

- What is the current brand platform?

- What are the core brand attributes?

- What are the extended brand attributes?

- What graphic, or other media-based elements, are used to express your brand?

- Is there a tagline?

- How will you deal with sub-brands (e.g., well-known schools/colleges within your institution)?

- How much awareness do your target audiences have about your brand?

- How is your brand perceived in the outside world?

- What are people saying about your institution on social media?

PILLARS

1. TRAFFIC

- Are there events, such as open houses, that people can attend?

- Are there landing pages for web traffic?

- What's the geography to cover with the advertising outreach effort?

- Which traffic sources have shown promise in the past?

- Which traffic sources have failed in the past?

- How much traffic is needed to achieve the desired lead generation at 5% conversion (i.e., where five out of every 100 people say, "Sure, tell me more.")?

2. DESTINATION

- Is the destination a landing page or a microsite?

- Has the destination been optimized for copy, design, and transaction?

- Is the destination responsive for mobile and tablet users?

- Have all the tracking codes been added to the destination?

- Are the calls-to-action jumping off the page?

- Have you tested the collection form?

- Does the collection form send data effectively into the CRM?

- Is the destination a location or event?

- Has the event's location been clearly marked from the street (i.e., can people see it when they walk or drive by)?

- Have enough people been trained to help convert the prospects?

- Is there swag that prospects can take with them?

- Have all representatives been trained to:

  - Use the right language and "asks"?

  - Overcome objections?

  - Handle a situation when they get stuck?

3. NURTURE

- What defines a lead? What is the ultimate goal? Application? Enrollment? Reconsidering your institution if they've been accepted but have yet to enroll?

- How much information do you need to collect to consider a lead "captured"?

- Among different audience segments, what is the very first touch they will receive after they become a lead?

- How soon after they become a lead will that first touch occur?

- Can you integrate multiple touchpoints into your flow (e.g., text messaging, telephone calls, in-person visits, etc.)?

- What are some logical communication flows that can be segmented by audience, season, or place in the recruitment cycle?

- Do you have the resources and the flexibility to test different messaging, timing, or other attributes of your campaign?

- Can you effectively ingest the communication flows into a CRM?

- Will the communication flows track open rates and click-through rates?