2022-04-29 Marketing Technology

Presentation and Discussion Notes

Presenters:

- Becky Joffrey, Technology and Innovation Officer at Cornell University
- Carrie Shumaker, CIO at University of Michigan-Dearborn.

Carry and Becky will be talking about the Marketing Technology challenges at universities. This space has been pretty much a wild-west of everybody buy one of everything for most of our institutions.

You are invited to participate in the Enterprise CRM EDUCAUSE Community Group that the two of them lead.

The "Martech" Mashup: A lot more tools have become available at institutions. The landscape is often fragmented, poorly governed, and poorly managed.

Business-Technology Context

Does technology under the umbrella of "academics" have different pressures and needs than technology under the more traditional administrative infrastructure?

	TRADITIONAL	EMERGING
Premise	CIT owns and maintains critical systems that support the organization's infrastructure	Business systems that used to be run in the units are becoming more robust and require an enterprise approach
Focus	Administrative	Academic
Examples	Facilities, student records, desktop support, email system, file storage systems, printing, room scheduling	Exec ed enrollment, global operations, student wellness, alumni fundraising, corporate partnerships, technology commercialization
Priorization	Infrastructure needs as defined by projects	Business needs as defined by strategic roadmaps
Business role	Guidance	Ownership
Funding	Annual	Incremental
What matters	Efficiency, cost cutting, reliability	ROI, pace, business outcomes

Cornell University

Friction point: Why can't IT run these new tools for us?

Jim: Is it being driven to central IT due to risk concerns?

Tools being used internally to central IT and externally.

Henry: Have you decomposed the current state by audience or channel?

Carrie: yes, that is part of the work for every implementation. It definitely varies!

The technology foundation we have can't support the future we need

1. Pressure to increase revenue requires new tools

2. IT is viewed as a cost to be reduced, not increased

3. Units buy their own tools
   – uncoordinated spend with no collective value
   – problem of rich units vs. poor units

4. New tech places increased burden on existing technology foundation

5. Operational demands that IT cannot support
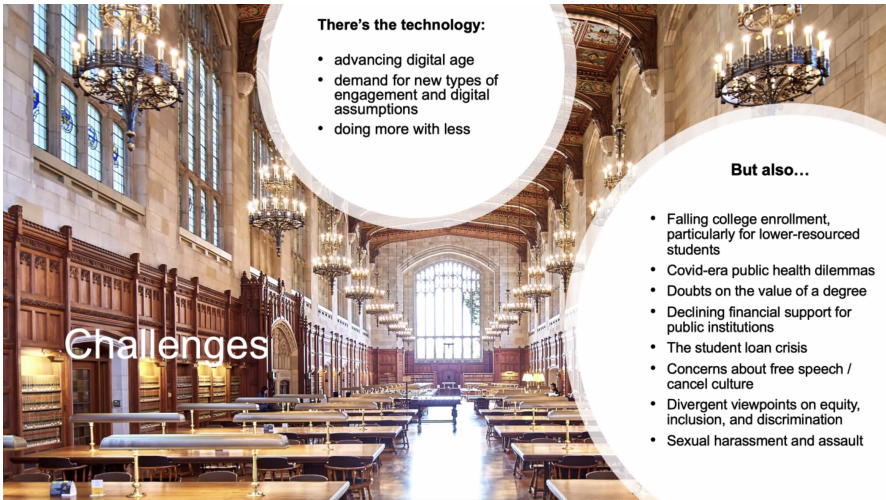
WHAT IS MARKETING?

from "How to Market a University"

The analysis, planning, implementation, and control of carefully formulated programs designed to bring about voluntary and satisfying exchanges of values with target markets for the purpose of achieving organizational objectives.

Philip Kotler,
Northwestern's Kellogg School of Management

Flannery, Teresa. How to Market a University (Higher Ed Leadership Essentials) (p. 20). Johns Hopkins University Press

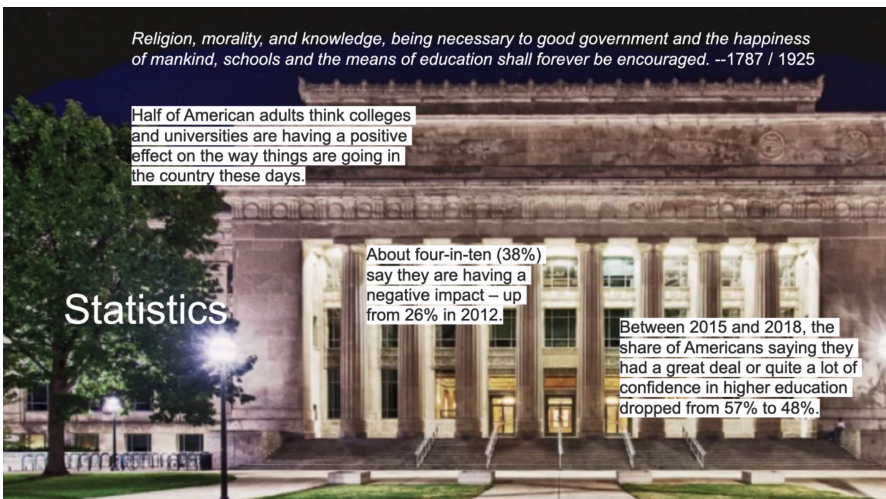Marketing often has a negative connotation in the Higher Ed space.

There's the technology:

- advancing digital age
- demand for new types of engagement and digital assumptions
- doing more with less

But also…

- Falling college enrollment, particularly for lower-resourced students
- Covid-era public health dilemmas
- Doubts on the value of a degree
- Declining financial support for public institutions
- The student loan crisis
- Concerns about free speech / cancel culture
- Divergent viewpoints on equity, inclusion, and discrimination
- Sexual harassment and assault

Challenges

Religion, morality, and knowledge, being necessary to good government and the happiness of mankind, schools and the means of education shall forever be encouraged. --1787 / 1925

Half of American adults think colleges and universities are having a positive effect on the way things are going in the country these days.

Statistics

About four-in-ten (38%) say they are having a negative impact – up from 26% in 2012.

Between 2015 and 2018, the share of Americans saying they had a great deal or quite a lot of confidence in higher education dropped from 57% to 48%.
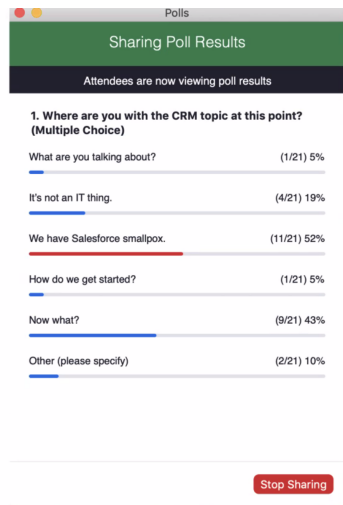
Table 1. Collaborative Teams Transform Traditional Communication Tools into Digital Capabilities

Traditional Component	Transformational Component
Local department call center and front desk	One-stop service with a single front door for a constituent
Email newsletters	Personalized targeted content delivered at the right moment depending on what the constituent needs
Listservs	Dynamic lists that automatically update based on defined criteria
Sending email or snail mail to a purchased list	Lead nurturing to make sure no one who wants something falls through the cracks
Social media posts	Social listening and sentiment analysis
Websites	Communities for support from staff, faculty, and peers
Data visualization	Data activation
FAQs	Conversation design and chatbots
Checklists	Journeys and "nudge technology"

One of the challenges is the lack of coordination across offices and departments.

This is compounded by fiefdoms and protection of jobs.

Polls

Sharing Poll Results

Attendees are now viewing poll results

1. Where are you with the CRM topic at this point? (Multiple Choice)

What are you talking about?	(1/21) 5%
It's not an IT thing.	(4/21) 19%
We have Salesforce smallpox.	(11/21) 52%
How do we get started?	(1/21) 5%
Now what?	(9/21) 43%
Other (please specify)	(2/21) 10%

Stop Sharing

How Enterprise Architecture can help with this

- Consider **business architecture** (not solution architecture)
- Data! Data governance, quality, creating a solid data platform
- Help avoid CRM/Salesforce "smallpox" by ensuring duplicative tools aren't bought
- Thinking about what business processes fit in which tool
- Thinking about how the project management process changes
- Others?

At NYU, units go out to fragmented tools with credit cards. Salesforce has contracted with departments individually. Attempts at a SF community have moved with fits and starts.

At Cornell, trying to push the effort back on units, rather than IT. Need others to create a strategic plan for the University.

Louis: similar to collaboration tools. Consistent set of capabilities that can be applied quite differently depending up on context. This makes it difficult for IT to apply solutions. And yet, there is a complex set of technologies to understand. Think of the problem as enterprise tools with domain-specific practices. If you start centralizing, it is no longer that specific department's problem.

Carrie: similar to content management system.

Louis: the initial driver for CMS was brand consistency.

Chuck Aikman: journey at Indiana University:

- We created a central IT CRM team as we adopted SalesForce. Started a user experience office. CRM group merged with central Marcom group (when former CIO was also interim VP Marketing). But now back in central IT.
- This all comes down to governing the risk.
- Schools are still doing own thing, but are having some success.

Jim: What are the right business capabilities and how do you want them delivered? What's the user experience desired for students? Also, the risk and privacy hook is important.

Becky: Netflixed – struggle between Blockbuster and Netflix. Blockbuster had built two separate infrastructures (brick-and-mortar and online) and couldn't manage.

Louis: it helps to break drivers down into key domains/missions/pillars. People start relating to drivers more. Break drivers down between risk and opportunity. University is highly risk-averse. We have segmentation in data governance, but a similar thing could happen with marketing.

Henry: at NYU, analyzed messages sent out to see who should say what to whom. Established mechanism to coordinate and share across offices.

Chuck: recently worked on standardizing mailings that went out (e.g., admissions application) to make them more consistent.

Becky: used to send out one big email, but now it's more conversational with the right information and community at the right time. Monitor email opens, and call if necessary.

Itana Business Announcements

- The EDUCAUSE Annual 2022 Itana event is shaping up.
- October 25-28, 2022
- Denver, CO and online.
- Agenda still being developed, but ...
    - Itana pre-conference session proposal on Governing the Solution Space
    - Itana CG meet-up proposal
    - Itana CG meet-up Space (poster board and gathering space)

If you are interested in Itana book club, contact JJ DuChateau.

Participants