



# Creating Enrollment-Marketing Synergy: A Collaborative Approach to Your Annual Strategy



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# INTRODUCING BERRY COLLEGE



<https://www.berry.edu/marketing/brand/anthem>

- Private comprehensive liberal arts
- Founded in 1902
- Located in Rome, GA
- 2,200 undergrad students
- Primarily residential
- Close-knit community
- Extensive student work program – LifeWorks
- World's largest campus

# 2017 – A YEAR OF AWAKENING

## Situation

- Disconnect across departments (silos)
- Only sporadic collaboration between EM and Marketing
- Branding message and story had become fractured
- Communications flow was mostly print and inconsistent – no automation
- Admissions team was bogged down with application reading and travel
- Admissions CRM wasn't being utilized effectively
- IT was looking for ways to become more of a strategic partner across the board
- Record low incoming class for 2018

## Re-focusing our efforts

- Marketing research to determine strategic direction
- New VP of Marketing and VP of EM
- Rebranded the college
- IT helped reimagine systems and manage projects – Salesforce
- Hired a Salesforce admin & Marketing Cloud admin
- Developed strategic external partnerships
- Invested in data structure, digital marketing and EM marketing systems
- Worked to build awareness within key markets in the southeast

# 5 YEARS OF GROWTH AT BERRY (2018-2023)

Organic website traffic

**+ 51%**

Total website traffic

**+ 36%**

Prospects/Leads

**+ 35%**

Applications

**+ 43%**

Deposits – goals shaped  
depending on annual goals

Consistently exceeded

Able to further shape

3<sup>rd</sup> year with waiting list

Academic quality

**+11%**

*Determined as percentage of students with a  
recalculated HS GPA of >3.6*

No need – merit only award

**+6%**

# PRIMARY KEY TO SUCCESS

Close collaboration between Marketing, EM & IT



## Focus Areas

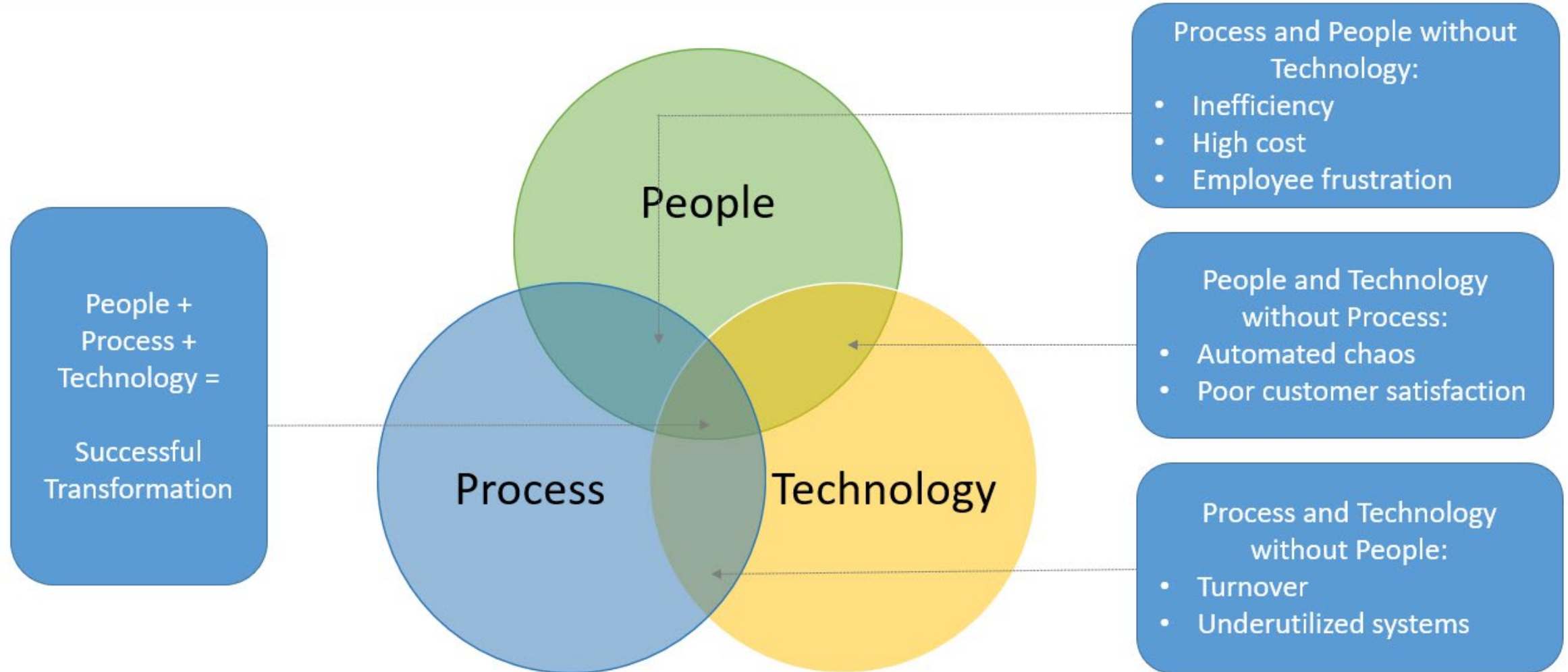
1. Sound project management methodology
2. Strategic approach to communications planning
3. Advanced leveraging of data and technology



# PROJECT MANAGEMENT METHODOLOGY

- In 2018, OIT was still new to using a project management methodology
- Primarily using waterfall but realized we needed to use a more agile methodology for reimagining our Admissions CRM
- Hired an external project manager and formed a core project team
  - Clearly defined problem statement and solution
- Important to understand this wasn't just an implementation or a few business process improvements – it was **Business Transformation**
  - Opportunity to define a bold ambition that goes beyond incremental change – to rethink our business and operating models to deliver breakthrough value. It involves strategic decisions that affect where we'll grow, how our organization operates, and what kinds of performance improvements we can expect.

# PROJECT MANAGEMENT METHODOLOGY



# PROJECT MANAGEMENT METHODOLOGY

- Worked with a consultant to map all enrollment business processes
- Contracted with CRM vendor to assist with implementation of new functionality and creation of new business processes
- Project team met weekly for around 3.5 hours
  - Provided weekly updates to admin team
  - Met as needed to work on specific issues
- Utilized a customized agile methodology that we developed along the way
- Project from start to finish was 9 months
  - It was HARD work
- Team continues to meet weekly
  - Continuous improvement



# PROJECT MANAGEMENT BEST PRACTICES

1. Don't wait until you have your project management methodology defined and all your processes in place – just start! Use an iterative process.
2. Bring in help from outside – we didn't yet have the expertise nor the time to manage such a large project.
3. Remember the People (not just the Processes and Technology) – one of our first priorities was team building, with a focus on trust. If your team can communicate effectively, they will be much more productive.
4. Take time to celebrate your successes. It's easy to move to the next task but it's important to the health of the team to set aside time to celebrate.

# STRATEGIC APPROACH TO COMMUNICATIONS PLANNING

## Annual Comm Flow Planning

- Marketing and EM
- Discuss previous wins and losses
- Graph out the comm flow plan on timeline
- Explore opportunities for enhancing
- Three 2-hour planning meetings w/lunch

## Bi-weekly Comm Flow Updates

- VPs and key Marketing and EM contacts
- Discuss recent launches and next 2 weeks
- Discuss obstacles and opportunities
- New EM marketing project are vetted through this team

## Weekly Technical Project Meeting

- IT and EM with Marketing as needed
- 2-3 hour meeting each Friday morning
- Discuss technical/data projects and issues
- Most people affected are at the table
- Uses hybrid Scrum Story format

## Weekly Executive KPI Updates

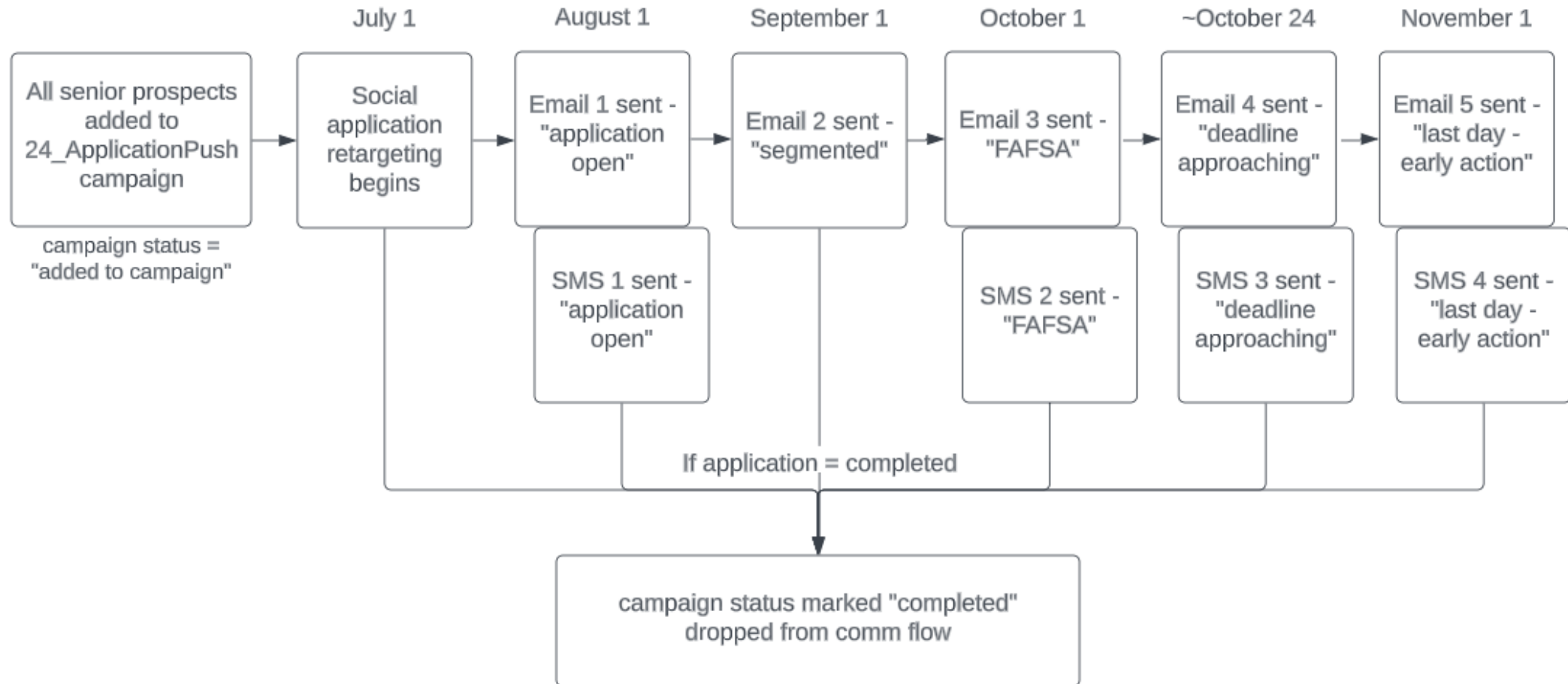
- President, VP of Finance, Marketing and EM, CIO as well as key contacts
- Highlight point-in-time performance metrics and comparison to previous years
- Provides opportunity for regular questions and guidance from President

# COMM FLOW PLANNING: Annual Build Plan

		Prospect season						Yield season							
Audience		June	July	August	September	October	November	December	January	February	March	April	May	June	Campaign Name
<b>Senior Campaign</b>															
<b>Consideration Build</b>															
	Viewbook	prospect+													24_DML_Viewbook
	Viewbook followup email/SMS from counselor	rec VB & parent													24_EML_ViewbookFollowup
	Fin aid brochure	prospect+ rec VB													24_DML_FinAid
	Nurture / brand message series	prospect+													24_EML_CoreNurture1-6, 24_EML_Second
	Holiday email	prospect+ &parent													24_EML_Holiday
<b>Application Push</b>															
	Apply email series	prospect no APP													24_EML_Apply1-8
	SMS	prospect no APP													24_SMS_Apply1-2
	Segmented apply email	prospect no APP													24_EML_SegApplyBusiness
	SMS	prospect no APP													24_SMS_SegApplyBusiness
	Spring apply email series	spring app prospect													24_EML_SpringApply1-2
<b>Visit Push</b>															
	YouVisit promotion email	prospect+													24_EML_YouVisit
	SMS	prospect+													24_SMS_YouVisit
	Fall visit postcard / email	prospect+													24_EML_FallVisit, 24_DML_FallVisit
	SMS	prospect+													24_SMS_FallVisit
	Spring visit postcard / email	admit+													24_EML_SpringVisit, 24_DML_SpringVisit
	SMS	admit+													24_SMS_SpringVisit
	Social visit retargeting	non-visitors													24_DIG_Visit

Download template – [www.berry.edu/commflow](http://www.berry.edu/commflow)

# COMM FLOW PLANNING: Designing an Application Push Campaign



# STRATEGIC APPROACH TO COMMUNICATIONS PLANNING

Other important points of strategic collaboration

- Regular comm flow project kickoff and review meetings
- Annual end of cycle “Lessons Learned” retreat
- Summer strategy planning retreat
- Regular touch-base meetings between EM Operations and Campaign Manager
- Implementation of a Data Analytics Leadership Team



# LEVERAGING DATA & TECHNOLOGY

Commit to the staff and resources needed to succeed

## Staff

Salesforce Admin

Marketing Cloud Admin

Content support

Project Manager

Enterprise Analytics

## Key Partners

Enrollment strategy  
alignment

Marketing Cloud  
integration

Data enhancements

Creative agency

Digital agency

## Training

Trailhead paths

Salesforce training  
opportunities for staff

Salesforce Premier  
Success support

Creation of shared  
document repository –  
Microsoft Teams

# LEVERAGING DATA & TECHNOLOGY

## Rolling out Salesforce Marketing Cloud + Pardot

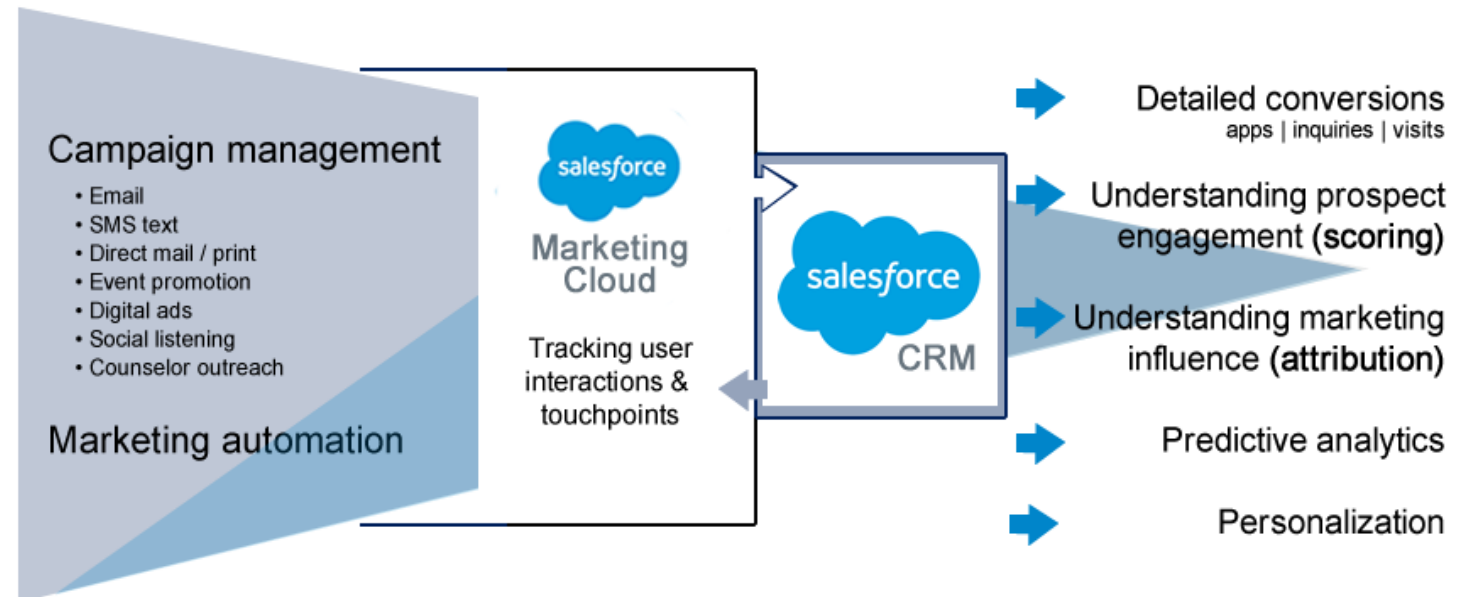
### Project Objectives

Take EM marketing initiatives to the “next level”

Consolidate marketing tools

Create and manage integrated campaigns with advanced activities such as automation and scoring

Leverage attribution and analytics



# LEVERAGING DATA & TECHNOLOGY

What we've learned:

- This approach requires a large investment – but the payoff is significant
- Existing data structure may need to be adjusted or reimaged
- Working toward connecting all the dots for tracking is crucial
- The use of Salesforce campaigns can greatly enhance Marketing insights
- Hold your partners accountable and understand the work
- The team needs to define the term - “personalization”
- Develop expertise in-house where you can
- Attribution is HARD

# WHAT WE'RE WORKING ON NEXT

More advanced data analytics through creation of Enterprise Analytics and the use of a data lake and PowerBI

**IN PROGRESS**

Full-scale implementation of Salesforce campaigns for advanced marketing tracking and analytics

**IN PROGRESS**

Review of all EM marketing tactics for micro-personalization opportunities (high-touch experience)

**IN PROGRESS**

**QUESTIONS?**



**BERRY**  
COLLEGE