



Unraveling the Customer Journey

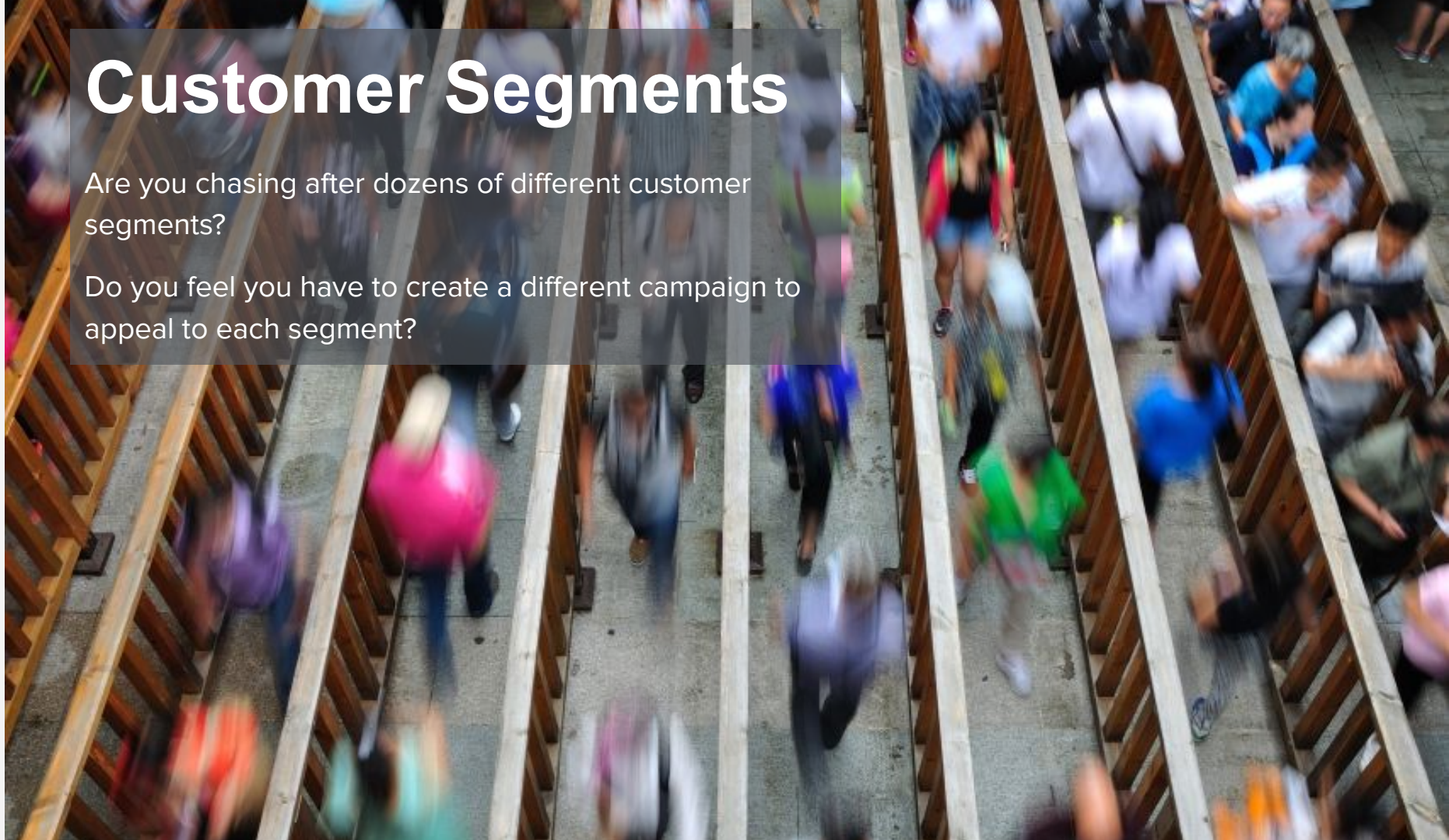
Better Marketing Through Personas & Journey Maps



Customer Segments

Are you chasing after dozens of different customer segments?

Do you feel you have to create a different campaign to appeal to each segment?



Marketers use data segmentation to classify various types of customers into specific groupings.

- Demographics
- Purchase Behavior & Buying Patterns
- Identity & Affiliations



Customer Segments



Divorced white women suburban college grads in the Upper Northwest who have an average of 3.4 children and purchased a home in the last three years.



Single Black men college graduate in the Southwest who do not own property, but do own cars purchased fewer than 5 years ago. 30 - 50 years old.



Married retired women from the Midwest who own vacation properties in the Southwest.

Are your customers faceless demographics?

Customer Segments

Customer segmentation forces marketers to juggle numerous segments without a clear concept of what makes each tick.

The result is the creation of dozens of campaigns or variations of campaigns that may not find their targets and/or provide messages that recipients find compelling.

This is time-consuming and expensive.



Personas

Marketers use personas to help them better understand their prospects and customers on a more personal level.

Consolidating customer segments into personas will allow to decrease the number of marketing campaigns and insure that your messaging is on target.



Personas

Personas unite dozens of market segments into a few, manageable groups that share common qualitative characteristics.

Personas allow you to see your customers as living, breathing human beings with unique attitudes, needs, and behaviors.



Personas

To create personas, marketers cross-tabulate data to find common attitudes, preferences, motivations, and behaviors.

To form personas, marketers analyze and differentiate their customers by looking at segment data as well as the following:

- Demographics
- Firmographics
- Psychographics
- Needs & Desires
- Behaviors
- Attitudes
- Messaging Preferences



MARK, 22

DEMOGRAPHICS

- Starts a 2 bedroom apartment in uptown Charlotte, NC with all amenities and free internet.
- Currently an intern for a large sports management company and a bar tender at a high end cocktail bar on the weekends.
- Recently single and using dating apps. He only chatted and received a puppy 4 months ago.
- Graduated with a 3.8 in Health Science from UNC-Ch. Owns \$28,000 in private loans.

BEHAVIORAL IDENTIFIERS

- Hobbies include watching out, lifting weights, playing club tennis, driving shift cars, listening to UNC and watching live music.
- Prefers chat systems for customer service and support. Values quick responses and 24 hour availability.
- Wants fast shipping. Values a low price. Prefers online marketing light colors, and simple websites.
- Shops online between 7pm-9pm. Buys during pay periods at the end of the month and often uses promo codes.
- Owns an Android and shops on mobile with referrals from social media such as Instagram and Facebook.
- Identified abroad in Chile. Can speak Spanish and some Italian. Travels on a budget and prefers hotels to hotels.
- Personal goals to be out of debt by 2024. He is engaged in sports and work in a university sports medicine department.
- Very fit and active but has a bad diet due to eating on a budget and drinking often. Seeks out health information daily.



JUSTIN, 31

DEMOGRAPHICS

- Starts a 2 bedroom apartment in uptown Atlanta with his partner. Looking to buy a home next year.
- Works 40 hours a week in a 3 star hotel as a superintendent with a net income of \$55,000.
- Recently engaged to his girlfriend of 5 years with plans to marry in NYC in the winter.
- Graduated from a community college with honors and held office in 3 on campus clubs.

BEHAVIORAL IDENTIFIERS

- Hobbies include video gaming, reading, monthly magazine playing the drums, volunteering, drinking craft beer, and watching local plays.
- Prefers to call for customer service and support. Values before up summary emails and easy to read documents.
- Wants free shipping on large orders. Values quality and privacy. Extremely brand loyal. Prefers email marketing.
- Shops online between 8pm-10pm and makes multiple returns. Uses Perpet at checkout.
- Owns an iPhone and tablet. Shops on this tablet with referrals from email marketing and promotions.
- Travels in the USA twice a year to visit family in Illinois and California. Prefers long road trips and holiday travel.
- Personal goals to become a general manager within 5 years and to purchase a suburban home after his wedding and honeymoon.
- Considers very healthy and with local products. Has great self care and is very active.



MAGGIE, 52

DEMOGRAPHICS

- Owns a 4 bedroom home in coastal NC and 2 dogs and cats. Lives in a suburban gated neighborhood.
- Works 40 hours a week in a 3 star hotel as a superintendent with a net income of \$55,000.
- Recently married for 12 years with 2 sons and a house hold income of above \$220,000.
- Well educated with an MEd degree from a state university. Graduated without debt.

BEHAVIORAL IDENTIFIERS

- Hobbies include reading, playing tennis, networking at the country club, being involved in youth groups and visiting the beach.
- Prefers to call for customer service and support. Values face to face communication and rewards systems.
- Wants a simple product. Values quantity and brand image. Prefers print marketing and build graphics.
- Shops in department stores after 5pm. Buys in bulk on sale items. Refers by a personal client.
- Owns an iPhone but makes purchases online with a desktop. Her computer needs a simple check out system.
- Well traveled in Europe. Prefers traveling in off peak times in chain hotels and stays pre-planned based on the locale.
- Personal goals to retire by age 65. Owns a vacation home on the Spanish Islands and for her sons to attend an Ivy League university.
- In very good health but very busy and often stressed. Values group exercise programs.

Customer Journeys

By mapping the **customer experience at every touch point**, marketers can design messaging and outreach that deepen the relationship and establish meaningful communication.

Five elements are typically included in a customer journey map:

- Personas
- Timeline
- Emotion
- Touchpoints
- Channels

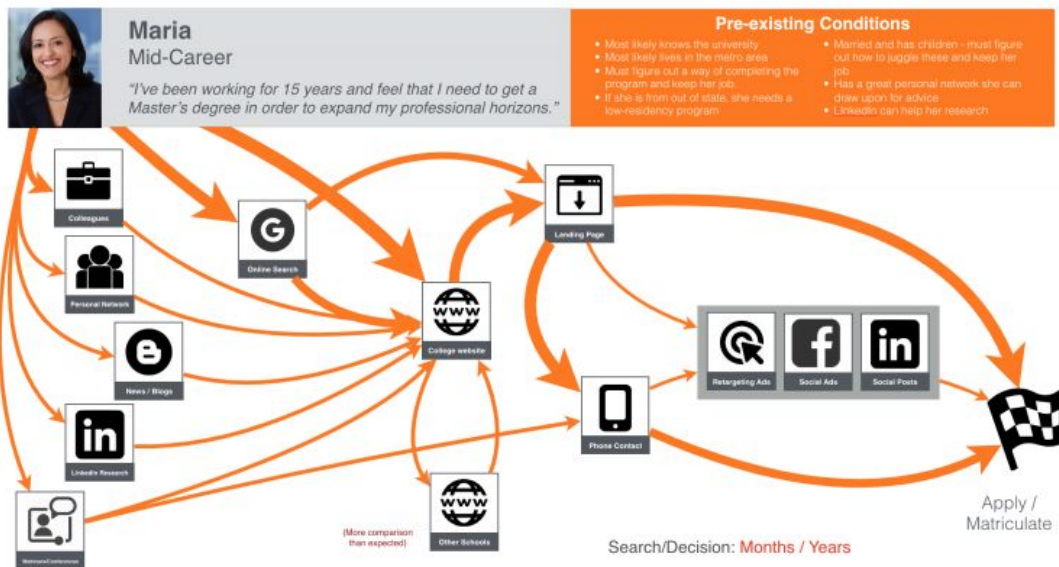


Customer Journeys

Customer journey maps give you the insight you will need to create marketing strategies that effortlessly **find your customers** and **deliver motivating messages** that encourage engagement.

Where does your website fit into the customer journey?

To answer, start with a basic framework for understanding all the marketing touchpoints as your customer persona is introduced to your organization and as the relationship deepens.



Customer Service Blueprints

Journey maps are great for customer relationships that have a beginning, middle, and end.

Customer Service Blueprints allow you to understand marketing channel contact and interaction points for people who have ongoing relationships with you, your service and/or your product.

They help you optimize these contact points in order to deliver customer interactions of the highest possible quality.



Research Methods

Persona development requires research that focuses on data that reveals **psychological** and **behavioral insights**,

These research efforts usually include:

- Qualitative / Quantitative Surveys
- Focus Groups
- Ethnographic Interviews
- Direct Observation
- Photography / Videography / Webpage Analysis



Research Methods

Once you have conducted your research, creating personas requires intensive **affinitization** analysis.

- Find commonalities between research subjects
- Map them across demographics, psychographics, and behaviors, and attitudes.
- Try dividing your groupings into two - five groups. Then divide these groups into their own groupings.
- It's a bit of an art, but affinitization will help you 'clump' segments into workable personas.



Personas





Susie
Socializer

"I want to take full advantage of the opportunities college provides for social engagement. I'm a serious student, but I really enjoy Greek Life, cheering our teams on and the social events on campus."



Athena
Athlete

"I was recruited to come and play for the University's team. I became interested in the school because I liked the coach, the facilities, and the opportunity to play for a high-calibre team with national visibility."



Miles
Local Resident

"I grew up near the school and have known about it all my life. The school is a great value because of the quality of the education and the low cost for in-state residents."



Kim & Lee
Parents

"Our child wants to study the visual arts. We are worried that they will not be able to get a job after graduation. We heard about the school's innovative program that combines business with the liberal arts"



Brandon
Black Student

"When I told my friends that I wanted to attend the school, they were concerned because of the school's history. But I love their athletic programs and my tour of the campus could not have been more welcoming."



Gracia
Grad Student

"The school has the perfect program and mentor for me. I had to convince my family that I would be safe attending the school and be able to concentrate on my studies."



Miles In-state Resident

“I grew up in the state and have known about the school all my life. The school is a great value because of the quality of the education and the low cost for in-state residents.”

DEMOGRAPHICS

- 17 yrs old (As Prospect)
- US Citizen
- In-state Resident
- Working, Middle, Upper Class

ABOUT

Miles has known about the school all his life. He knows of many people who attended the school. He knows about the school's history - the good and the bad. He is looking for the best educational value he can find. The location near home, the in-state tuition, his familiarity of the school, and the quality of the instruction all help him to put the school at the top of his list. It's important that his major will allow him to find a good job - or attend a good graduate program. He is only marginally interested in the school's social life - he has a number of close friends who will be attending with him.

TECHNICAL ABILITY



MEDIA PREFERENCES



DEVICE USAGE FOR RESEARCH



WORDS TO DESCRIBE ME

Thrifty
Outcome Oriented
Serious Student
Suburban
Local Active
Practical
Good Student



GOALS & NEEDS

- I need the best value for an education I can get - excellent academics & low tuition.
- I would like to go someplace away from home, but not too far.
- The social environment of the school is fine, but I don't want it to distract from my studies.
- I want to be able to get a great job or attend a top-notch grad school once I have graduated.
- I want to be able to pay off my student loans as quickly as possible.



PAIN POINTS

- Cost** - In addition to the in-state tuition, I need to figure out how to save on all other aspects.
- The **loan load** I will have to bear after graduation. How do other people pull this off?
- Online options** - Is there any way I could matriculate from home and save **living expenses**?
- School reputation** - If I move to another state outside of the South, will the school's reputation for past inequities reflect poorly on me?



INFLUENCERS

- + **In-state Tuition** - and other reviewers indicated that the school would be a fun experience.
- + **Ranking Services** - The school is regarded highly by a number of different rating and ranking services.
- + **Friends & Family** - I have heard great things about the school from many friends and family members.
- **Negative Press Coverage** - When the school turns up in the national news the coverage is often unflattering. The school also tends to be a stand-in for **racial strife** on campus.



Susie
Socializer

“I want to take full advantage of the opportunities the school provides for social engagement. I'm a serious student, but I really enjoy Greek Life, cheering our teams on and the social events on campus.”

DEMOGRAPHICS

- 17 yrs old (As Prospect)
- US Citizen
- Outside the State
- Upper Middle Class

ABOUT

Susie's first awareness of the school was from its sports teams or from her parents - if she is a legacy student. She put the school in her top five when she read that it offered both a high-quality education and a great social environment. When she started, she wasn't sure of her major. But the school had a broad enough range of programs she knew they would have something for her. When she toured the campus, she was struck by the beauty of the campus, Greek life, welcoming attitude, and social opportunities. Because she hadn't chosen a major, she was less concerned about career outcomes.

TECHNICAL ABILITY



MEDIA PREFERENCES



DEVICE USAGE FOR RESEARCH



55%



45%



0%

WORDS TO DESCRIBE ME



GOALS & NEEDS

- I need the traditional 4-year undergraduate on-campus experience.
- A university with a strong academic reputation.
- A school with a great social environment.
- A school that would allow me to find a group of students that will be my best friends.
- A school that will help me explore my abilities and reach my full potential.
- A school that will set me up for success.



PAIN POINTS

- Cost** - I will have to pay out-of-state tuition to attend. Are there any scholarships for me?
- The **loan load** I will have to bear after graduation. How do other people pull this off?
- Being away from home for the first time. Will the **dorm** and **food** be okay?
- It was expensive to travel all to the campus to **tour** the school. Couldn't there be a better way to tour **virtually**?



INFLUENCERS

- + **College Confidential** - and other reviewers indicated that the school would be a fun experience.
- + **Ranking Services** - The school is regarded highly by a number of different rating and ranking services.
- **The Website** - I don't know how much it will really cost to attend - the website doesn't help.
- **The Website** - What is the **campus experience** like? I can't tell from the website. I need videos and photos of the dorms, cafeterias, fitness facilities with testimonials from students.



Brandon Black Student

“When I told my friends that I wanted to attend a Southern school, they were concerned because of the school's history. But I love their athletic programs and my tour of the campus could not have been more welcoming.”

DEMOGRAPHICS

- 17 yrs old (As Prospect)
- US Citizen
- US / Int. Resident
- Working/Lower/Middle /Upper Classes

ABOUT

Brandon could be an in-state or out-of-state resident or an international student. He could be an undergraduate or grad student. What makes his persona unique from the others is that he is Black, African, or a Caribbean resident of African descent. Brandon first came to hear of the school through national media coverage of the University's athletic teams. If he is a graduate student, his awareness is based on recommendations concerning a specific graduate program. Brandon feels that he has to justify his interest to friends and family because of the school's troubled history of ethnic inequality. The school must prove to him that his experience will be respectful and rewarding.

TECHNICAL ABILITY



MEDIA PREFERENCES



DEVICE USAGE FOR RESEARCH



60%



40%



0%

WORDS TO DESCRIBE ME

Worried
Caribbean
First Generation
Local African
Black
Indigenous
Motivated
Concerned
International



GOALS & NEEDS

1. A school that is welcoming and diverse.
2. A school where I will fit in with people who will value me
3. I need to be able to justify my interest in a Southern school to friends and family.
4. I want to go to a school that will give me the support I need as a first generation student and/or international student.
5. A school with solid outcomes for Black students.



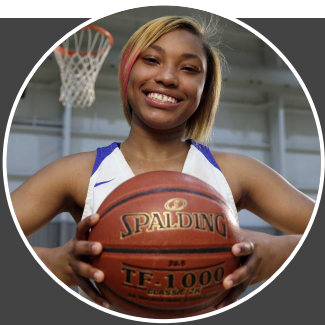
PAIN POINTS

- **Reputation of School** - How will I justify to my family and friends that I am going to the school?
- **College Process** - I'm a first generation student and I'm not sure how college works.
- **Fitting In** - Are their groups on campus for Black students? Will everyone treat me well in the dorms?
- **Virtual Visit** - I can't afford to travel to the school. Is there any way I could find out what it's like online?



INFLUENCERS

- + **School Tour** - The tour is excellent. They made me feel welcome and were excited for me to attend.
- + **Athletic Teams** - The school has great sports teams and the campus sports culture looks like fun.
- **Family** - Everyone in my family says that I will not be wanted at the school.
- **The Media** - Whenever any ethnically motivated controversy comes up, the media references events that took place at the school as examples.



Athena Athlete

“A scout contacted my high school coach. She planned for me to meet the scout and they offered me a great scholarship. I also like that the school is close to home and I fell in love with the sports facilities when I took a tour.”

DEMOGRAPHICS

- 17 yrs old (As Prospect)
- US Citizen
- Outside New England
- Working / Lower / Middle Class

ABOUT

Athena's first contact with the school was watching the school's teams play on TV when she was in junior high and beginning to take basketball seriously. Her awareness grew in high school during the recruiting season when a scout representing the school reached out to her coach. Her goal is to play professionally so she needs to go to a school with a great team and get a lot of game time. It's important to her that she bonds with the coach and her team. She assumes she will be getting a scholarship, but she needs to know what it covers. She is a first-generation student, so she needs more support with how it all works.

TECHNICAL ABILITY



MEDIA PREFERENCES



DEVICE USAGE FOR RESEARCH



WORDS TO DESCRIBE ME

Driven
Cliquey
Active
Intuitive
Athletic
Fit
Disciplined
Competitor
Exceptional
Competitive
Sporty
First Generation



GOALS & NEEDS

- I need to play for a great team and get a lot of game time to get the attention of pro scouts.
- I need to play for a coach and teammates who will support me and will help me improve.
- I need to figure out how sports scholarships work and how to finance my education.
- I need a counselor to help me understand how to pull off classes and sports at the same time.
- I need to meet the coach and team.



PAIN POINTS

- Talent Doubts** - The team is good. Am I good enough to see a lot of play time?
- I'm a **first generation** student. I don't know enough about what I will need to do to pull it off.
- I'm supposed to **practice** and go to **class** at the same time. How do other athletes pull that off?
- My family can't afford to pay for college. Will an **athletic scholarship** cover everything I need?
- Will I get along with my **coach** and **teammates**?



INFLUENCERS

- + **TV & YouTube** - I like to watch the team play. The best place is on the school's YouTube channel.
- + **Team Ranking** - I want to play on a great team. I'll get more exposure.
- + **Athletics Subsite** - I spend a lot of time looking at the team roster to see if I would fit in.
- + **Coach Videos** - I need to see the coach in action during practice.
- **The Website** - There is a lot of stuff on this website that I don't understand. I need help!



Gracia
Grad Student

“The school has the perfect program and mentor for me. I had to convince my family that it's not the school of the past. That I would be safe attending the school and be able to concentrate on my studies.”

DEMOGRAPHICS

- 22 yrs old (As Prospect)
- Domestic / International
- Multi-lingual
- Upper Classes

ABOUT

Gracia is interested in attending the school because a particular program and professor caught her eye while she was researching her grad school options. The program is a great fit and her emails from the professor lead her to believe she would be a great mentor. She used professional journals and websites to find out more about the program and LinkedIn to find out more about the program leader. Her family and colleagues were concerned about her attending the University because of her ethnicity. They had seen international media coverage about the school and the South's general negative regard for “foreigners.”

TECHNICAL ABILITY



MEDIA PREFERENCES



DEVICE USAGE FOR RESEARCH



WORDS TO DESCRIBE ME

Sophisticated
Scholarly Minority
 International Cosmopolitan
 “Foreigner”
 Multi-Lingual



GOALS & NEEDS

1. A school that has the perfect program for me - solid academics and great research opportunities.
2. A program with a professor who is a great mentor - who values me and is good with students
3. A school that is welcoming and diverse.
4. I need to be able to justify my interest in the school to friends and family.
5. A school with solid outcomes for International students in my field of study.



PAIN POINTS

- **Moving to Campus** - What do I need to do to apply to the school and move there if accepted?
- **Virtual Visit** - I can't afford to travel to the school. Is there any way I could find out what it's like online?
- **Reputation of School** - How will I justify to my family and friends that I am going to the school?
- **Fitting In** - Are their groups on campus for Grad students? A grad center? What is life like for Grad students?



INFLUENCERS

- + **Campus Tour** - The tour is excellent. They made me feel welcome and were excited for me to attend.
- + **Academic Reputation** - The school has a reputation for academic excellence and solid programs for grads.
- **Family** - Everyone in my family says that I will not be wanted at the school and won't fit into the “Southern” way of life.
- **The Media** - Whenever any ethnically motivated controversy comes up, the media references events that took place at the school as examples.

Journey Maps



Lucy / Local Student

"I grew up not too far from the campus, so I know quite a bit about the school and the people that go there."



1. Knows the School

Lucy has known about the school since she was a kid. Family members have attended the school. She has seen the school compete in athletics on TV, in the news, and on billboards and other non-digital advertisements. She has always seen the school as an option for college - along with other private schools in New England.

2. Many Campus Visits

Lucy has been on the campus quite a bit since she was a kid - from seeing a relative graduate to attending a music festival to enrolling in some high school programs. She knows the campus pretty well so she may not take advantage of an official school tour.

3. Visit Website

Because she has a lot of pre-existing knowledge of the school, Lucy's visits to the school website will be more practical and tactical. She will not spend as much time on campus life as she spends on finding the right program and how much it will cost to attend.

4. Compare & Contrast

Even though she is a light visitor to the website, Lucy is busy comparing and contrasting the top schools on her list. It's important that she knows the school's Major/Minor approach. She also needs easy access to tuition & fees, average expenses, outcomes, social life, and student groups.

5. Social Media

Lucy uses social media to find out more about the programs and how they impact the lives of current students and alumni. She has problems finding this info on the site. She visits the school's Youtube page to find Day-in-the-life testimonials.

ACTIONS

FEELING

STRATEGY

Existing Knowledge of the school

Excited for college

Sees the school on TV / basketball

Concerts / Events

College fairs

Informal campus tour

Uses Major/Minor Tool

Disappointed with Program pages

Can't find program outcomes

Tries to find tuition & fees

Missing testimonials about affordability

Quality of program focus

YouTube

Alumni Outcome Videos



Optimize Local Media / Advertising Channels

- Continue to use traditional media advertising - Billboards, Radio spots, PR, non-profit sponsorships, etc. to reinforce identity for local residents.
- Make sure the video the school uses to advertise the school during commercials is on brand and appealing to both students & parents.



Offer Compelling High School Programming

- Make sure to offer programming that would be appealing to local students to get them on campus and experience the school.
- High school performing arts programming.
- High School camps - Boys/Girls State, and special outreach programs.
- Appealing concerts & events.



Improve Pathways to Programs / Cost Information

- Fix usability issue on the website to provide easy and quick access to programs, tuition & fees, and scholarship info.
- Provide basic stats for the school that can be used to compare the school to other schools.
- Emphasize the quality of the programs with specific, measurable outcomes.



Make Comparison Info Easy / Include Outcome Statistics

- Once Lucy finds the info she is looking for - this is difficult compared to other websites! - the school looks good on paper.
- Make the information she needs for his comparison as easy as possible to find on the website.
- Include testimonials from alumni outcomes on a program-by-program basis.



Make Social Media Outcomes Based

- The school's Facebook page is not exciting. Make sure that pages aimed at prospective students show what the learning experience is like on a program-by-program basis.
- Continue to create student testimonials and post them on the website and on YouTube.

Lucy / Local Student

"I grew up not too far from the campus, so I know quite a bit about the school and the people that go there."



6. Apply

Lucy uses the site to figure out what she will need to do to apply to the school. However, she is still worried that she will make a mistake in the application and will not be accepted. She wants to talk to a counselor about the process and get candid advice about her chances of acceptance.

7. Accept

Lucy finds out the school has accepted her, but she has a lot of questions about how much she will have to pay to matriculate. That will play a big role in her and her parent's decision. She talks to an admissions counselor to find out about scholarships and her package.

8. Matriculate

Lucy must figure out how to register for classes, collect her scholarship/loan funds, pay her bills, buy her books and all the other things she will need to start her first year. This is easier for Lucy because she is a local student and has a better idea what to expect.

9. Current Student

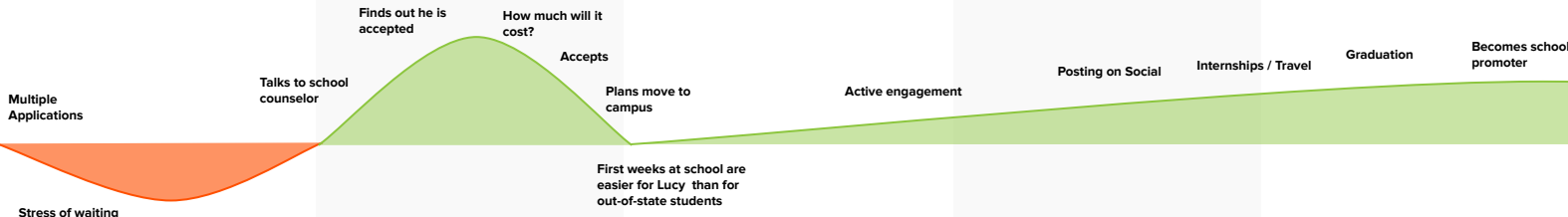
Lucy will need access to all the resources for current students. It must be centrally located in an easy-to-find place on the site. She will also wish to join clubs and/or a Greek chapter. She may want to create videos of her college experience to post on social media.

10. Graduate

Lucy wants to effectively transition between student and fully employed graduate. If she wishes to continue with Grad School she will research those options as well. She will wish to take full advantage of the school's career services website and counselors.

ACTIONS

FEELING



STRATEGY



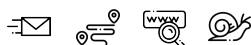
Access to School Counselors

- Ensure that the Get More Info link is ubiquitous across the site.
- Personalize the CTAs with photos of counselors and testimonials
- Include multiple ways for prospects to get more info: chat, email, phone, blogs, etc.
- Ensure that the Application process info is easy and straightforward.



Online Resources for Accepted Students

- Make sure there is a complete section on the website for accepted students that has all the resources accepted students and their parents need.
- Ensure that calls to action for financial aid and bursar's office are prominent.
- Keep communication going with emails and brochures, etc.



Online Resources for Relocation

- Online guidelines should be made available for matriculating students.
- Emails with to matriculation info should be sent.
- Make sure that the academic calendar is easy to find on the website.
- Include links to a special 1st year student calendar of events.



Current Student Resources

- A current students section on the website that provides resources and links to relevant info..
- Events/Sports/Social Calendar
- Internship and study abroad program information.
- Clubs and Greek chapter info
- Community volunteering info
- Publishing opportunities to the website and social media.

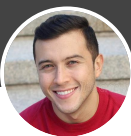


Provide Alumni Resources to Help Promote the school

- Provide career services information on the website.
- Create a portion of the Alumni website that helps recent grads make the transition to dues-paying members.
- Get Lucy into the alumni network and begin steadily cadenced communication that encouraged alumni engagement.
- Get her on the alumni journal mailing list.

Miles / Mid-Atlantic

"I grew up in Delaware and I had never heard of the school before I saw its basketball team mentioned on TV."



1. Brainstorm Future

As Miles starts thinking seriously about college, he begins to use online services (USNews, etc.) and tools to research his options. He also becomes aware of Colleges' national media campaigns - particularly videos during nationally televised sporting events.

2. Visit the school Website

Miles visits the school website for the first time to check if it meets the expectations set by what he has researched. He expects a vibrant experience on the homepage. He checks out the school's Major /Minor /Stem approach and how much tuition will cost. He is also looking for ROI and change of employment after graduation.

3. Virtual Tour/Counselor

Miles doesn't want to spend money on traveling to the school for a tour so he takes the virtual tour and uses Google Maps to check out the campus. He also decides to reach out to the school by calling an admissions counselor. (He doesn't want to fill out a form and wait to hear from the school.) He has questions about the business school.

4. Compare & Contrast

Miles has created a spreadsheet. He uses it to compare and contrast his top college options. These include programs, tuition & fees, average expenses, campus life, outcomes, social life, student groups, food, campus, safety, distance from home, etc.

5. Social Media / LinkedIn

Miles decides to visit the school's social media pages to see what is "really happening" on campus. He visits Instagram as well as Facebook. He looks at the YouTube videos of student testimonials. He visits LinkedIn to see if he can find the school grads and see what they are up to professionally - especially business professionals.

ACTIONS

FEELING +

STRATEGY

US News / Naviance /
College Confidential

Sees the school
on TV

Excited for
college

Expects
exciting
homepage

Browses
majors

Tries to find tuition
& fees

Finds the Business School pages

Completes
Major/Minor
function

Testimonials

Virtual tour

Can't find
social/campus life
info in website

The school
compares
favorably

The social
scene

Day-in-the-life
videos



Penetrate / Optimize National Media Channels

- Ensure that the statistics online services use for the school are accurate and any negative criticism found on third-party apps is addressed and responded to.
- Make sure the video the school uses to advertise the school during commercials is on brand and appealing to both students & parents.



Optimize Website Experience

- Ensure that homepage uses graphics/video to show the school as an exciting, vibrant, and prestigious school.
- Ensure that the school's Major/Minor approach is prominently displayed
- Address usability issues across the website to ensure quick access to highly desired content.



Improve Virtual Tour / Provide Phone Counselor Contact

- Improve the virtual tour to make the school look vibrant and dynamic.
- Ensure that both the social and academic aspects of the school come through loud and clear.
- Include student testimonials throughout high-traffic page flows.
- Provide photos of school counselors and their contact information. Include program contact information as well.



Make Comparison Info Easy / Include Testimonials & Groups

- Once he finds the info he is looking for - this is difficult compared to other websites! - the school looks good on paper.
- Make the information he needs for his comparison as easy as possible to find on the website.
- Include testimonials from students like Miles explaining their rationale for attending the school.

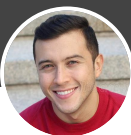


Make Social Media Personal

- Make sure that Outcome stories are featured on social media. Miles is looking for confirmation that the school will help him get a great job. This needs to be seen.
- Day-in-the-life videos are very popular with prospective students. Make sure they are featured across social channels.

Miles / Mid-Atlantic

"I grew up in Delaware and I had never heard of the school before I saw its basketball team mentioned on TV."



6. Apply

Miles uses the site to figure out what he will need to do to apply to the school. However, he is still worried that he will make a mistake in the application and will not be accepted. He wants to talk to the counselor again about the process and get candid advice about his chances of acceptance.

7. Accept

Miles finds out the school has accepted him, but he has a lot of questions about how much he will have to pay to matriculate. That will be a big role in his and his family's decision. He talks to an admissions counselor to find out about scholarships and his package.

8. Matriculate

Miles must figure out how to move to campus, register for classes, collect his scholarship/loan funds, pay his bills, buy his books and all the other things he will need to start his first year - very stressful. He also wants to take advantage of all the social events for 1st year students.

9. Current Student

Miles will need access to all the resources for current students. It must be centrally located in an easy-to-find place on the site. He will also wish to join clubs and/or a Greek chapter. He may want to create videos of his college experience to post on social media.

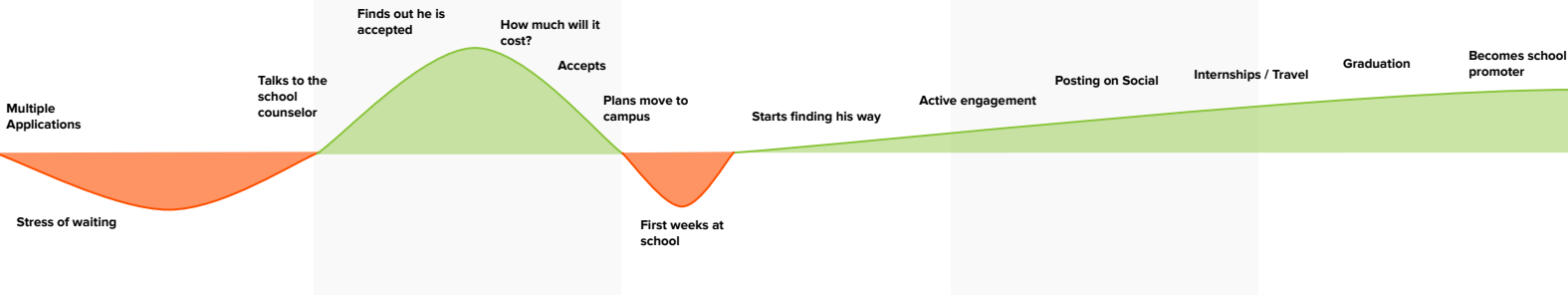
10. Graduate

Miles wants to effectively transition between student and fully employed graduate. If he wishes to continue with Grad School he will research those options as well. He will wish to take full advantage of the school's career services website and counselors..

ACTIONS

FEELING

STRATEGY



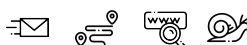
Access to School Counselors

- Ensure that the Get More Info link is ubiquitous across the site.
- Personalize the CTAs with photos of counselors and testimonials
- Include multiple ways for prospects to get more info: chat, email, phone, blogs, etc.
- Ensure that the Application process info is easy and straightforward.



Online Resources for Accepted Students

- Make sure there is a complete section on the website for accepted students that has all the resources accepted students and their parents need.
- Ensure that calls to action for financial aid and bursar's office are prominent.
- Keep communication going with emails and brochures, etc.



Online Resources for Relocation

- Online guidelines should be made available for matriculating students.
- Emails with matriculation info should be sent.
- Make sure that the academic calendar is easy to find on the website.
- Include links to a special 1st year student calendar of events.
- Greeting team should be in place on move-in day.



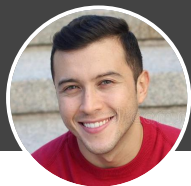
Current Student Resources

- A current students section on the website that provides resources and links to relevant info..
- Events/Sports/Social Calendar
- Internship and study abroad program information.
- Clubs and Greek chapter info
- Community volunteering info
- Publishing opportunities to the website and social media.



Provide Alumni Resources to Help Promote the School

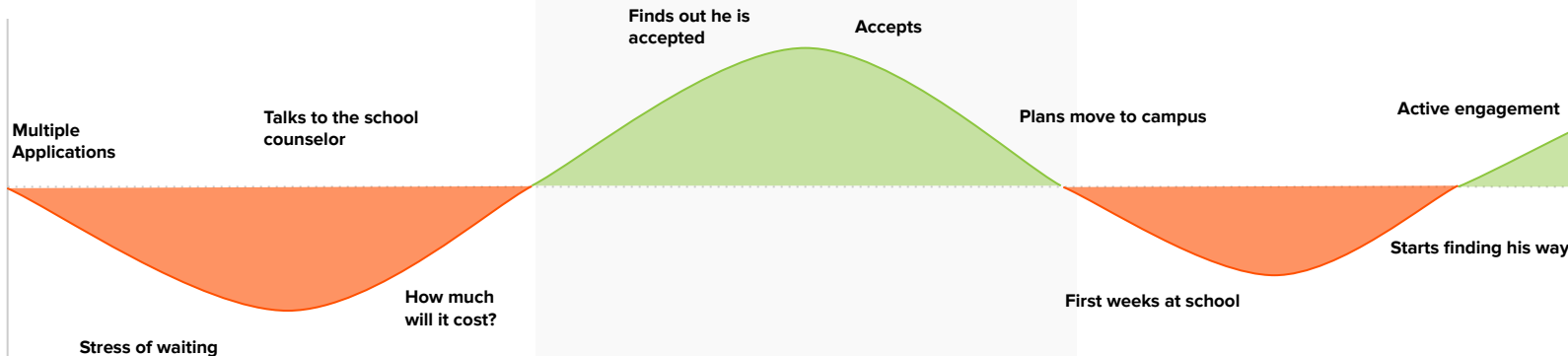
- Provide career services information on the website.
- Create a portion of the Alumni website that helps recent grads make the transition to dues-paying members.
- Get Miles into the alumni network and begin steadily cadenced communication that encouraged alumni engagement.
- Get Miles on the alumni journal mailing list.



Miles / Mid-Atlantic

"I grew up in Delaware and I had never heard of the school before I saw its basketball team mentioned on TV."

FEELING



STRATEGY



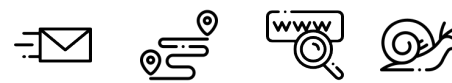
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Customer Service Blueprints





STRATEGY

Newsletter: Relevant, Real-world, Compelling, Use of CTAs

The email newsletter is the primary contact point for Alison. She opens it and will often click on the CTAs for more information. Include brief summaries of real-world impact of the School - with links to news stories and events. Offer quick quotes from students, researchers, faculty, and alumni with links to full testimonials. Include campaign information with links for participation.

- Is text/imagery compelling?
- Does it demonstrate real-world impact?
- Are CTAs visible and compelling?

Alumni Relations Office: Visible and Approachable

It is difficult to find the Alumni Relations contact information on the alumni website. Their role at the School is not clearly defined - particularly if these are the people who liaise with alums and donors with deep pockets. These contacts need to be presented as personable, helpful, and committed to the School's mission.

- Is contact information ubiquitous and welcoming on the website?
- Do counselors have the donors bios so that they can use them to help prepare themselves for conversations?
- Is there enough information on the website about the multiple ways donors can contribute besides an online donation?

Events: Lectures, Conferences, Seminars, Alumni, Online and In-person

Alums return to both the alumni and School website to discover events they find of interest for their careers and to stay involved.

- Is it easy to find events on the two different websites?
- Can the events be filtered by type, topic, and audience?
- Are there online recordings of events available?

Continuing Education: Advanced Degrees as Well as Course of Interest

Alums are hungry to look for ways of staying in the game. Many of the alums interviewed really enjoyed school and are looking for opportunities to expand their education.

- Are the programs offered delivered in a way that can accommodate the busy lives of professionals?
- Are the programs and course relevant to mid-career professionals?

Alumni Website: Alumni as Positive Change Agents for World Health

This is Alison's secondary contact point. She visits the alumni page a few times a year. Portray alumni as engaged in the real world and supporting the School's mission in active ways. Portray students who need assistance as vital to the world's future. Make networking, alumni events, lectures, and giving easy to find. Make it easy to find ways to participate that don't include a nominal online donation.

- Where is planned giving?
- How do you contact a financial advisor?
- How can I contribute to the mission in non-financial ways?
- Where are donor testimonials?

Online Donation: Alternate Modes of Participation Are Needed

The online donation pages that are linked from the School as well as the alumni site are findable. The information on the simple form page is not compelling or complete.

- Are there donor testimonials?
- Are there examples of impact?
- Are there financial advisor contact information?
- Are there examples of alternative ways to participate and/or give?
- Is there current campaign information?
- Where is information about the financial health / endowment of the School?
- Is there information about planned giving?

CONTACT POINTS



Newsletter



Alumni Website



Donate online



Alumni Relations Office



Events



Continuing Education

Summary

Personas, Journey Maps, & Customer Service blueprints will help you:

- Save time, resources, and capital by creating fewer - more impactful - marketing campaigns.
- Launch campaigns that appeal directly to the needs and goals of your customers.
- Deliver campaigns to the right channel at the right time to maximize exposure.
- Improve your ROI by effective targeting and thrifty advertising.