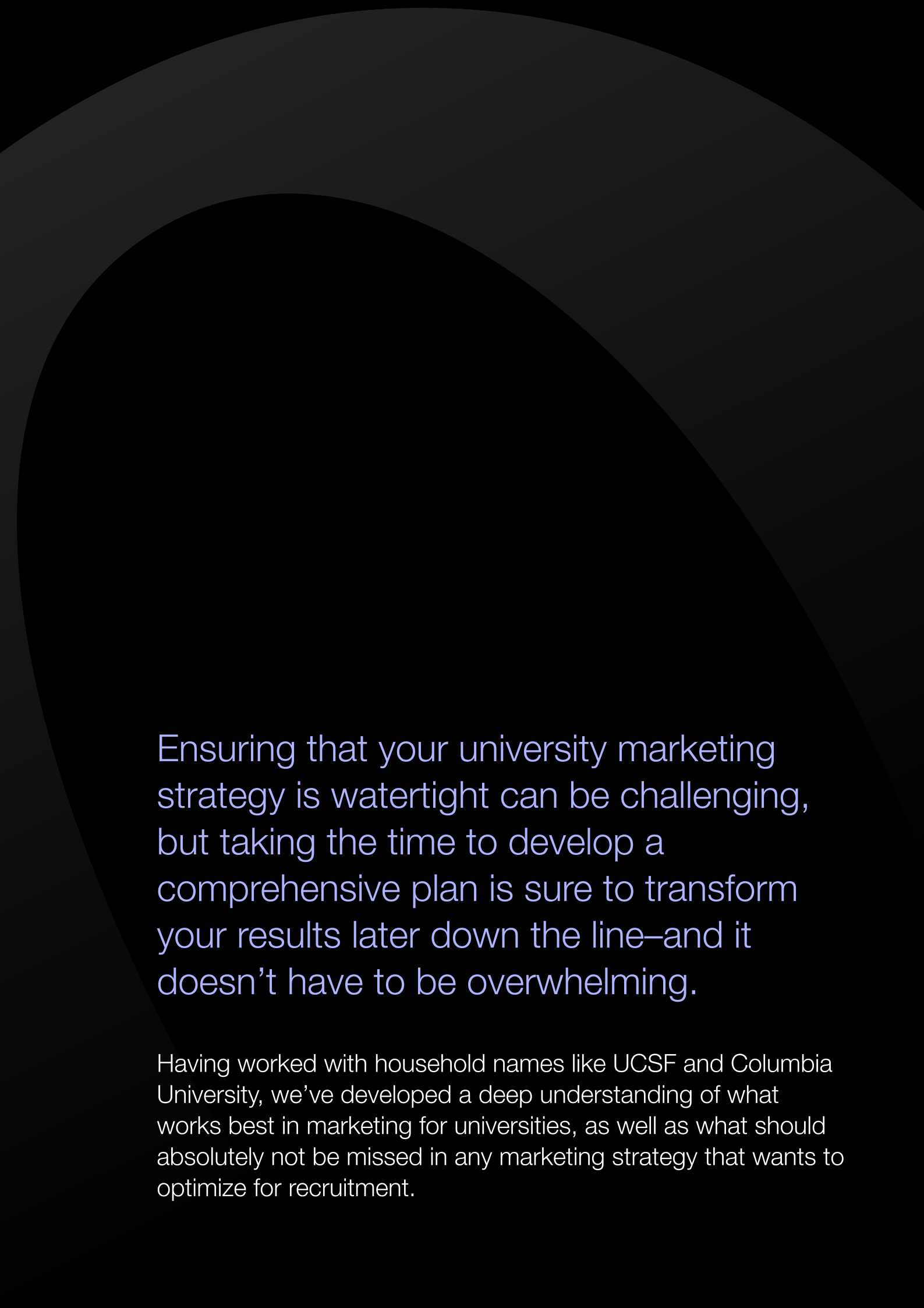


The Ultimate Checklist for a Thorough Marketing Strategy for Universities: A Step-by-Step Guide



Ensuring that your university marketing strategy is watertight can be challenging, but taking the time to develop a comprehensive plan is sure to transform your results later down the line—and it doesn't have to be overwhelming.

Having worked with household names like UCSF and Columbia University, we've developed a deep understanding of what works best in marketing for universities, as well as what should absolutely not be missed in any marketing strategy that wants to optimize for recruitment.

Universities that implement targeted and data-driven marketing strategies often see a higher engagement from prospective students, leading to a more robust applicant pool and ultimately, higher enrollment rates

This guide will arm you with proven tactics in digital marketing for universities, making your campaigns more effective than ever. We'll cover everything so that you can define a custom marketing strategy for university campaigns that truly connect with prospective students. We'll include creative strategies for social media and give you a comprehensive plan to advertise and market to university students effectively.

In this checklist, you will discover a comprehensive framework designed to elevate your university's marketing efforts—in the form of an easy-to-digest checklist. Each step is packed with proven digital marketing tactics that have been refined through our work with leading institutions. Expect to gain insights into creating effective social media strategies, optimizing your website, and crafting targeted email campaigns. Additionally, you will find practical advice on continuously measuring and evaluating your strategies, fostering team collaboration, and staying current with industry trends.

Whether you're looking to fill in any gaps in your marketing efforts or find new ways to connect with students more deeply this year, our guide has got you covered. Check these steps off one by one to attract top students and ensure a successful recruiting season.



Take Stock and Reflect

for a Successful Marketing Strategy
for Universities

To kickstart a successful marketing strategy, it's essential to take a step back and thoroughly evaluate your current and past efforts.

This foundational step involves analyzing what has and hasn't worked specifically for your institution, rather than relying solely on industry-wide recommendations. Consider your unique challenges and opportunities for the upcoming year and think about what changes might be necessary for future success.

ANALYZE YOUR CURRENT EFFORTS:

- ☐ Conduct a comprehensive review of your usual marketing efforts to identify strengths and areas for improvement.
- ☐ Get clear about what is and isn't working. Collect data from previous years and analyze where your spend brings back the most ROI and where it fails to do so.
- ☐ Consider feedback from past campaigns, including both qualitative and quantitative data, to understand your performance better.
- ☐ Consider your challenges and opportunities this year; is your budget changing? Will you be able to hire an agency to help your marketing efforts? Is your team expanding or contracting?

DEFINE YOUR TARGET AUDIENCES:

- ☐ Who is your audience this year? Segment your audience not only by age and demographics but also by the characteristics of their generation. (For example, if you're marketing to Gen Z, you must understand their social spaces and communication styles. It's crucial to adapt your approach to engage them effectively online.)
- ☐ Think about your audience from an emotional lens as well: What are they hoping to get from a university experience? What are their wants and needs? What about your university's ethos has the potential of connecting with them on a deeper level?
- ☐ Create detailed personas for each segment to guide your strategies and ensure your messaging resonates with each group.

SET CLEAR OBJECTIVES:

- ☐ Establish precise goals and ensure they align with the wider institution's priorities and vision. (Note: Make sure to liaise with the sales department, and more importantly, with stakeholders.)
- ☐ Make sure your objectives are specific, measurable, achievable, relevant, and time-bound (SMART).
- ☐ Decide your departmental KPIs and benchmarks based on previous years' data and what success looks like to you.

2

Create a Thorough Implementation Plan

for a Successful Marketing Strategy
for Universities

This step is where strategy meets action. It's time to take all the insights and objectives you've gathered and turn them into a clear, actionable roadmap.

This plan is essential for ensuring that every aspect of your marketing efforts is well-coordinated, timely, and impactful. With a clear road ahead, you'll be ready to execute your strategies smoothly and effectively, ensuring no opportunity is missed to showcase your university's strengths and attract prospective students.

CRAFT A SOCIAL MEDIA POSTING CALENDAR:

- ☐ Develop a schedule for regular posts on all relevant social media platforms, as indicated by your audience analysis.
- ☐ Plan content themes and topics in advance to ensure consistent and engaging communication. What will your content strands be? How are you planning on engaging your audience in new and exciting ways this year?
- ☐ Include dates for special campaigns, student takeovers (which we highly encourage), and live events.

IDENTIFY PR OPPORTUNITIES:

- ☐ Highlight significant university achievements, announcements, and events that can be leveraged for positive media coverage.
- ☐ Plan press releases and media pitches around these PR moments.
- ☐ Create detailed personas for each segment to guide your strategies and ensure your messaging resonates with each group.
- ☐ Include crisis communication plans for handling potential negative press—just in case.

PLAN YOUR UPCOMING EVENTS:

- ☐ Schedule and promote open houses, campus tours, and virtual information sessions.
- ☐ Plan your participation in education fairs, conventions, and other industry-related events.
- ☐ Create detailed personas for each segment to guide your strategies and ensure your messaging resonates with each group.
- ☐ Schedule in workshops, webinars, and Q&A sessions with prospective students and their families.

FIND SPEAKING OPPORTUNITIES FOR UNIVERSITY LEADERS:

- ☐ Collate a list of your University Leaders and make sure that they represent a large cross-section of your community.
- ☐ Identify conferences, panels, and industry events where your university leaders can speak.
- ☐ Plan and promote public lectures, guest appearances, and other speaking engagements.

PLAN STUDENT AMBASSADOR PROGRAMS:

- ☐ Develop programs where a diverse range of your current students can share their experiences and promote the university.
- ☐ Plan regular content from student ambassadors, such as blog posts, social media takeovers, and campus tour videos.
- ☐ Consider developing programs to reach out to potential students from underrepresented or disadvantaged backgrounds; it's essential for creating an inclusive university environment looking into the future.
- ☐ Are there any inspirational stories in your current student body or alumni? Why not involve them in your ambassador programs so they can help promote your university to people from similar backgrounds to theirs?

ENHANCE ALUMNI ENGAGEMENT:

- ☐ Schedule events and communications to engage alumni, encouraging them to share their success stories and support recruitment efforts.
- ☐ Plan alumni spotlights and testimonials to be featured in marketing materials and on the website. Do you have any shining stars? Make sure to promote them!
- ☐ Create detailed personas for each segment to guide your strategies and ensure your messaging resonates with each group.

BOOST COLLABORATIONS AND PARTNERSHIPS:

- ☐ Identify opportunities to partner with influencers, local businesses, and other important local institutions. Plan joint events, co-branded content, and collaborative campaigns to extend your reach and visibility.
- ☐ Establish partnerships with schools and community organizations in underrepresented areas to create awareness about your university. Offer workshops, college prep programs, and informational sessions to help students navigate the application process and envision their future at your institution.

ESTABLISH YOUR CONTENT MARKETING AVENUES:

- ☐ Develop a content calendar that includes blog posts, articles, videos, infographics, and other valuable content.
- ☐ Plan content around key themes such as student life, academic programs, faculty achievements, and research breakthroughs.

PLAN AND BUDGET FOR ADVERTISING CAMPAIGNS:

- ☐ Schedule digital advertising campaigns, including paid search ads, social media ads, and display ads.
- ☐ Plan traditional advertising efforts such as print, radio, and outdoor ads if applicable.

CONSIDER YOUR COMMUNITY ENGAGEMENT:

- ☐ Organize community outreach events and volunteer opportunities.
- ☐ Plan initiatives that highlight the university's role and impact in the local community.
- ☐ Collaborate with local cultural, minority, and affinity groups to create events and programs that resonate with diverse communities.

DEVELOP A YEARLY MARKETING PLAN FROM ALL OF THE ABOVE:

- ☐ Create a yearly marketing calendar and fill it in with the big dates in the year. Make sure to highlight when recruitment season is taking place, when you will want to start your campaigns, any significant PR moments for your university that you can promote, etc.
- ☐ Outline specific steps and timelines for executing your marketing strategies.
- ☐ Assign responsibilities to team members to ensure accountability and smooth execution.
- ☐ Incorporate milestones to track progress and adjust the plan as needed.s.

3

Refresh Your Website and Marketing Material

for a Successful Marketing Strategy
for Universities

A fresh, engaging digital presence is crucial for capturing the interest of prospective students—especially Gen Z.

Your website and marketing materials serve as the first impression of your university, and it's essential that they reflect your brand's strengths and values. Refreshing these elements not only enhances your user experience but also ensures that your messaging is consistent and compelling across all platforms.



ASSESS YOUR WEBSITE:

Conduct a detailed review to pinpoint areas needing improvement and slight updates. (Tip: Our clients always forget to update the copyright year!)



PRIORITIZE THE HIGHEST IMPACT CHANGES:

Assess your website as a whole and, taking into account today's top website marketing strategies for university recruitment, make a list of priorities.



REDESIGN (OR SIMPLY REFRESH) YOUR WEBSITE:

Make the tweaks necessary to make sure your website is modern, visually appealing, and user-friendly. While a large redesign isn't always possible, small changes can make a big difference to keep your look modern. Do you have any such opportunities?



UPDATE MARKETING MATERIALS:

Make sure to align all marketing materials with your institution's current branding and messaging (this should include presentation decks, the marketing collateral for your representatives will use in events, and social media templates).

4

Contour Your Digital Marketing Strategy

for a Successful Marketing Strategy
for Universities

Crafting an effective digital marketing strategy involves multiple components, each aimed at enhancing visibility, engagement, and conversion.

From optimizing your website for search engines to implementing personalized email campaigns and leveraging digital advertising, every element must be strategically designed to meet your audience's needs and expectations. In this section, we'll explore key strategies to elevate your digital marketing efforts, briefly mention the best tech solutions for doing so, ensuring you reach and resonate with prospective students in the most impactful way.

☐ FOSTER TEAM COLLABORATION:

Ensure all marketing team members and stakeholders work together and have channels open for collaboration. This is crucial in order to boost institution-level success beyond segregated departments.

ENHANCE YOUR SEARCH ENGINE OPTIMIZATION (SEO):

☐ Conduct keyword research to identify terms prospective students are using when searching for universities. (This may change, so please don't rely on information collected in previous years.)

☐ Optimize your website content, including landing pages, blogs, and (very importantly) program descriptions, for these keywords.

☐ Ensure the website is mobile-friendly, loads quickly, and has a user-friendly navigation structure.

☐ Build high-quality backlinks to improve search engine rankings.

STRENGTHEN YOUR EMAIL MARKETING:

☐ Build segmented email lists based on prospective students' interests, demographics, and stages in the application process.

☐ Create personalized email campaigns to nurture leads, provide application tips, and share news about the university.

☐ Use automation tools to send targeted emails based on user behavior, such as reminders for incomplete applications or invitations to campus tours.

☐ Track open rates, click-through rates, and conversions to continuously improve email campaign performance.

OPTIMIZE YOUR WEBSITE:

- ☐ Ensure your website provides an excellent user experience with easy navigation, compelling visuals, and clear calls to action.
- ☐ Implement lead capture forms to collect information from visitors interested in learning more about your programs.
- ☐ Use landing pages tailored to specific campaigns or audience segments to increase relevance and conversion rates.
- ☐ Consider using chatbots or live chat features to answer prospective students' questions in real-time.

DIGITAL ADVERTISING:

- ☐ Use targeted ads on search engines and social media platforms to reach prospective students based on their interests, behavior, and demographics.
- ☐ Create compelling ad creatives that highlight the unique benefits of your university and include strong calls to action. (Note: Make sure to include university spokespeople as diverse as the audience you are trying to reach!)
- ☐ Retarget visitors who have shown interest in your university but have not yet taken action, such as those who have visited the application page but didn't complete the process.
- ☐ Track the performance of digital ads and optimize them based on data insights to maximize ROI.

CONVERSION RATE OPTIMIZATION (CRO):

- ☐ Conduct A/B testing on landing pages, forms, and calls to action to determine what variations yield the best conversion rates.
- ☐ Simplify the application process by reducing the number of steps and making it as intuitive as possible.
- ☐ Use heatmaps and user session recordings to understand how visitors interact with your website and identify areas for improvement.
- ☐ Offer virtual appointments or instant chat with admissions counselors to assist prospective students in real-time.

5

Measure and Evaluate Continuously

for a Successful Marketing Strategy
for Universities

Continuous measurement and evaluation are the cornerstones of a successful marketing strategy for universities.

In this competitive field, it's imperative to track performance, analyze data, and optimize tactics to ensure your efforts are driving meaningful results. By adopting a proactive approach to monitoring and refining your strategies, you'll be better equipped to adapt to changing market dynamics and achieve your university's recruitment goals effectively.

TRACK PERFORMANCE:

1

Review and Establish your KPIs (Key Performance Indicators):

Have you defined those specific, measurable KPIs to track the success of each of your marketing efforts? Make sure that, as the year progresses, they are still relevant to your priorities.

2

Set Up Analytics Tools:

Use tools like Google Analytics, Google Search Console, and social media analytics platforms to monitor website performance, traffic sources, and user behavior.

Implement tracking pixels and UTM parameters on marketing materials to gather detailed data on how users interact with your content and campaigns.

3

Attribution Analysis:

Use tools like Google Analytics, Google Search Console, and social media analytics platforms to monitor website performance, traffic sources, and user behavior.

Implement tracking pixels and UTM parameters on marketing materials to gather detailed data on how users interact with your content and campaigns.

4

Monitor Campaigns in Real-Time:

Regularly check the performance of active campaigns to identify any issues early and make necessary adjustments.

Use dashboards to provide a real-time overview of key metrics and track progress against your goals.



ANALYZE DATA:

1 Regular Performance Reviews:

Schedule regular intervals (e.g., weekly, monthly, quarterly) to review campaign performance and analyze any data trends that might've emerged.

Compare current data with historical performance to identify patterns and assess the impact of your marketing strategies.

2 Segment Analysis:

Break down data by audience segments to understand which groups are responding best to your campaigns. This can include segmenting by age, geography, behavior, and more.

Use cohort analysis to track how different segments behave over time and adjust strategies to better target each group. This will also support you to address the differences in each of your diverse segments with more cultural sensitivity.

3 Attribution Analysis:

Use multi-touch attribution models to understand how different marketing channels contribute to conversions. This helps in identifying the most effective channels and allocating budget accordingly.

Analyze the customer journey to see which touchpoints are most influential in driving applications and enrollments.

Optimize Your Results:

SET UP A CONTINUOUS IMPROVEMENT CYCLE:

- ☐ Implement a feedback loop where insights from performance analysis are used to refine and improve marketing tactics. This can include adjusting ad creatives, modifying website content, or reallocating budget to higher-performing channels.
- ☐ Conduct A/B testing on various elements of your campaigns (e.g., email subject lines, landing page designs, call-to-action buttons) to determine what works best.

INCORPORATE FEEDBACK:

- ☐ Gather qualitative feedback from prospective students, current students, and other stakeholders to complement quantitative data. This can provide deeper insights into how your marketing communications are coming across and what really resonates with your audience.
- ☐ Use surveys, diverse focus groups, and interviews to gather this feedback and incorporate it into your marketing strategies.

BENCHMARKING:

- ☐ Compare your performance against industry benchmarks and competitor data to identify areas where you can improve or where you are excelling.
- ☐ Use benchmarking to set realistic goals and measure your progress relative to similar institutions.

REPORT AND COMMUNICATE FINDINGS:

- ☐ Regularly report findings to key stakeholders, including university leadership, marketing teams, and department heads. This ensures everyone is aligned and informed about the effectiveness of the marketing efforts, which will in turn make it easier for you to get institutional buy-in in the future.
- ☐ Use visual aids like charts and graphs to make data easy to understand and actionable.

ADJUST AND REFINE STRATEGIES:

- ☐ Based on data analysis and feedback, make informed decisions about where to focus your efforts. This might involve shifting resources to more effective channels, tweaking messaging to better resonate with your audience, or launching new initiatives based on emerging trends.
- ☐ Stay agile and be ready to pivot strategies quickly in response to new data or changing market conditions.

6

Stay Open to Collaboration and Communication

for a Successful Marketing Strategy
for Universities

Effective collaboration and communication are essential pillars of a successful marketing strategy for universities.

In a complex ecosystem like higher education, where multiple departments and stakeholders are involved, seamless collaboration is key to driving institution-wide success. This section invites you to consider ways of fostering teamwork, maintaining open lines of communication, and incorporating valuable input from key stakeholders. By prioritizing collaboration and communication, you can ensure alignment across departments and maximize the impact of your marketing efforts in achieving institutional goals.



FOSTER TEAM COLLABORATION:

Ensure all marketing team members and stakeholders work together and have channels open for collaboration. This is crucial in order to boost institution-level success beyond segregated departments.



ENSURE EVERYONE GETS A VOICE:

Often, junior team members may lack confidence to speak up and keep their insights to themselves, causing potential 'aha' moments to be missed. They tend to be closer to the demographics you're aiming to reach, such as Gen Z, making their perspectives particularly valuable.



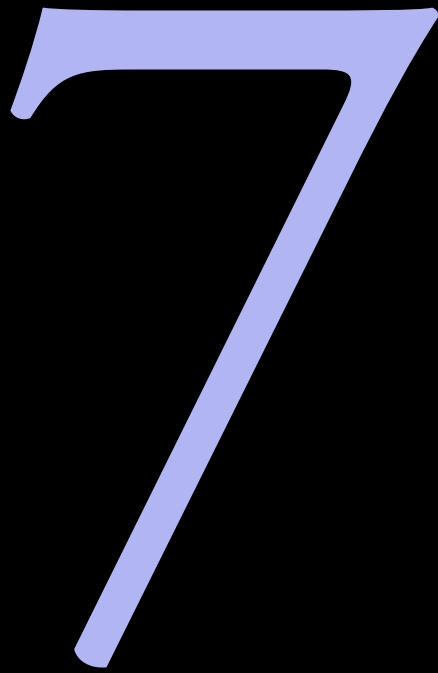
MAINTAIN OPEN COMMUNICATION:

Keep channels open for feedback and coordination.



INCORPORATE STAKEHOLDER INPUT:

Use feedback from key stakeholders to improve your marketing efforts.



Keep an Eye on the Competition

for a Successful Marketing Strategy
for Universities

Keeping a vigilant eye on the competition is essential for staying ahead of the curve

This section dives into strategies for effectively monitoring and analyzing your competitors' activities across various channels, from website updates to social media engagement and email marketing campaigns. By gaining insights into competitors' strategies, universities can identify areas for improvement, capitalize on opportunities, and differentiate themselves in the market.



WEBSITE ANALYSIS:

1

Regularly visit competitors' websites to see updates, new features, and content changes. Pay attention to user experience, design, and functionality.

2

Use tools like SimilarWeb or SEMrush to gather insights on their website traffic, keywords, and backlink profiles.



SOCIAL MEDIA MONITORING:

1

Follow your competitors on social media platforms to observe their content strategies, engagement levels, and audience interactions.

2

Use social listening tools to track mentions of competitor universities and gauge public sentiment.



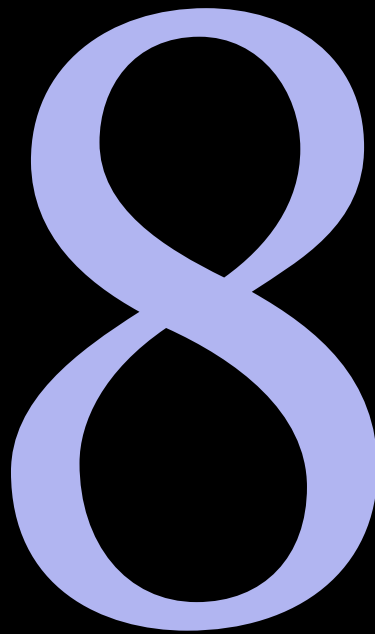
EMAIL AND CONTENT MARKETING:

1

Subscribe to competitors' newsletters and email campaigns to stay informed about their latest initiatives, events, and communications.

2

Analyze the frequency, content, and design of their emails to identify best practices and opportunities for differentiation.



8

Stay Up To Speed
With Industry Trends

for a Successful Marketing Strategy
for Universities

Staying abreast of industry trends is vital for maintaining a competitive edge.

This section explores strategies to keep universities informed and responsive to evolving market dynamics. Universities should always proactively adapt their strategies to align with emerging trends and seize new opportunities.

☐

READ MARKET RESEARCH REPORTS:

1

Regularly read industry reports, surveys, and publications to stay informed about the latest trends, challenges, and opportunities in higher education marketing.

2

Use this information to anticipate changes in the market and adjust your strategies accordingly.

☐

NETWORKING AND CONFERENCES:

1

Attend industry conferences, webinars, and networking events to connect with peers and learn about new strategies and best practices.

2

Engage with thought leaders and participate in discussions to gain fresh perspectives and ideas.

☐

CONSIDER GETTING EXPERT ASSISTANCE:

1

Consider partnering with specialized marketing agencies to gain insights and expertise that can elevate your strategies and give you a competitive edge.

Feeling Overwhelmed? Take the Shortcut to Success

This checklist is only the beginning of developing a bulletproof marketing strategy. In truth, there is much more depth and nuance to the ideal approach that emerges when you're immersed in the day-to-day tasks of implementation. Without a strong marketing partner by your side, this process can quickly become overwhelming.

With our expertise in the higher education sector, we can help you achieve your marketing goals and draw in the perfect students to your institution. At Oak Theory, we offer a comprehensive suite of services tailored for university marketing departments. Our consulting services leverage industry knowledge and diverse perspectives to craft unique strategies sensitive to DE&I, while our branding services help create powerful brand identities and cohesive visual identities. Our web design and development expertise ensures user-friendly, brand-aligned websites that drive key metrics, and our product design capabilities deliver intuitive and efficient applications. Additionally, our marketing and print services ensure your brand is communicated effectively across all platforms, from physical to digital.

With a focus on understanding your mission and audience, we provide the tools and insights needed to elevate your university's marketing efforts. Ready to kickstart your recruiting season with confidence? You don't need to do it all alone.

Get in touch with us and we'll help you with implementing these strategies for success.

Reach out: hello@oaktheory.co