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Conference Twitter: #uceamktg
Marketing can be defined as a process that includes communicating, creating, and delivering products that have value for clients. Marketing must both identify and anticipate client profitability. For many educational institutions, the client is another university department that manages programs for its respective clients, faculty or student body.

Through this presentation we will illuminate the structure and best practices of our marketing department to apply to your existing department or to help you to build a new marketing department.
Marketing has much in common with the ancient martial art of Karate. Both utilize the forces of targeted delivery and trajectory to disseminate the message or fatal blow.

- The Karate master identifies and anticipates the next move of their opponent. The contact points on their body not only concentrates the force and dissemination of each strike but presents each point to the best offensive advantage in combat. The sum of the parts comes together as one centralized unit, deadly, but effective.

- The challenge of the Karate master, as is an effective and efficient marketing department, is to capitalize on the combined abilities of the team.

- The University of Kansas Continuing Education (KUCE) marketing department employs the age-old idea of point of contact in our daily operation. It is the key to our success as a marketing team and how we coordinate and structure our processes and activities through a central project manager.
Capitalize on the combined abilities of your team with point of contact

Point of Contact Definition:
Person or department serving as the coordinator or focal point of an activity or program

“Since different people have different ideas and interests, the challenge is to capitalize on the combined abilities of the team.”
Key Points: The Marketing Karate Master

After this workshop, participants should know how to:

1. Structure an effective marketing department with proven techniques
2. Build cooperative relationships with clients and vendors
3. Capitalize on the combined abilities of your team with point of contact
4. Integrate project management software for project tracking
5. Bridge the gap between administration and marketing
6. Maximize staff potential with cross-training and continuing education
7. Generate additional revenue through external marketing opportunities
Best Practice: Reporting structure of KUCE units is key to effective marketing results and smooth project management

The project manager expedites initiatives to each member of the marketing team on behalf of their client in a seamless chain of communication. Saving their client time and money; placing each marketing team member in the best possible light, and to the best of their individual creative advantage.

• Our clients are KUCE program managers and other departments of the university. Marketing strives to balance program management needs and marketing initiatives. The structure of our marketing unit and reporting chain of KUCE serves to support an integrated system of communication.

• Program management involves overseeing all activities involved in a program, including working with marketing within time and budget constraints to meet client needs. It is the marketing project manager’s job to be the point of contact and liaison on behalf of the marketing department to program management staff to meet joint marketing objectives and unit financial goals.
Structure an effective marketing department with proven techniques

Executive Director

Director of Professional Programs and Communications

Director of Marketing

Program Managers

Units/Clients
Aerospace Programs
KLETC
Medical Center
Fire and Rescue
APP Program Managers

Business Office
Financial Hub

Project Managers
Marketing Staff

Editors
Graphic Designers
Webmasters
Programmers
Distribution Center
Mailing List Specialists

KU Continuing Education
The University of Kansas
**Marketing Director** plays a key leadership role in planning and implementing marketing strategies to achieve Continuing Education’s self-sufficiency goals. Also, conducts comprehensive marketing assessments and campaign planning; manages marketing staff and mail center.

**Project Managers** manage projects and coordinate workflow with marketing staff and program management staff.

**Graphic Designers** provide design services for both print and electronic delivery.

**Editors** use AP style for consistency and grammar.

**Webmasters** are responsible for Web site content, development and management for the general KUCE Web site and satellite sites related to specific programs.

**Mailing List Specialists** consult with program managers and project managers to identify target audiences and lists for direct mail pieces and targeted e-mails.

**Bindery and Mail Distribution Services** tabs, addresses, labels, bar codes, sorts, meters, and maintains USPS postal standards for bulk and overseas mail distribution. The Distribution Center is also a full-service bindery that binds, stuffs, collates and distributes materials for conferences and workshops.
Best Practice: Mission and Services

Marketing Department Mission

The marketing department functions as a full-service advertising agency. We provide quality marketing strategies and services to best disseminate the message of our clients. We provide:

- Integration of process and message
- Quality control and consistency
- Marketing plans and financial budget modeling
- Program branding
- Identity standards in keeping with the university at large
- Templates
- Coordinated services with registration center and business staff
Our Services

Print materials
• Brochures, postcards, newspaper ads, signage, flyers, notebooks, programs, premiums, press releases and reports

Mailing and Distribution
• Mailing list procurement and maintenance, addressing, bar coding, mail processing, sorting and bindery

Electronic-related advertising
• Web pages, video taping, targeted e-mails, online ads, Facebook, YouTube, viral advertising campaigns and analytics

Photography
• Event photography, slide shows, photo correction, PowerPoint presentations and event videos

Editing
• Press releases, newsletters, reports, essays, publications and Web content
Best Practice: Integrated Team of Professionals

Marketing Staff: Integrated Team of Professionals

Cross training is the key to department efficiency and increased opportunities in setting financial goals

• By cross training staff members in overlapping functions, time is spent optimally. No time is wasted; thus, opening opportunities for increased bandwidth in number of jobs and increased revenue opportunities.

• Marketing Illumination, a sub unit of the marketing department generates additional revenue through external marketing opportunities.
Maximize staff potential with cross-training and continuing education

Marketing Illumination Structure

Director of Marketing

- Business Office helps generate outside invoices
- Graphic Designer/Project Manager for outside projects
- University clients in need of marketing services

- Graphic Designers
- Project Managers: editors, financial analysis
- Web Designers & Programmers
- Distribution Center and Mailing List Specialists

www.ContinuingEd.ku.edu/illumination
Project Manager

Role and function: Builds cooperative relationships with clients (i.e., program managers) and outside vendors (printers, specialty companies)

Not to be confused with:

- Project coordinator
- Program manager
- Program coordinator

Program management includes overseeing all actions involved in a program, including working with marketing within time and budget constraints to meet client needs.
Build cooperative relationships with clients and vendors

Project Manager: Role and Function

Client → Project Manager → Outside Vendor

Budget Marketing Plans
Reggie Financial Reporting
Successful Marketing Management in Continuing Education

A balancing act:

- Program needs vs. marketing initiatives
- Creativity vs. capability
- Budget constraints
- Timelines
Marketing Meetings: The First Critical Step

“The general who wins a battle makes many calculations in his temple ere the battle is fought.” – Sun Tzu, Art of War

Establish the marketing strategy for the program before starting its projects; i.e., **strategy** before **tactics**

KUCE Marketing Meetings
- Initiated through our Reggie online information system
- Linked to Microsoft Outlook for automatic e-mail notification
- Collaborative group objectives are discussed and outlined
Marketing Strategy Meetings

Marketing plans, campaigns and budgets are generated from the initial marketing meeting, including Marketing Checklist and estimate requests.

Meeting may include:
- Program Manager/Client
- Marketing Director
- Project Manager
- Graphic Designer
- Mailing List Specialist
- Webmaster

From this meeting, the entire scope of the program is put together, tying all projects into one cohesive marketing strategy.
Project Managers Go to Work

After the marketing meeting, the project manager begins the process of:

- Gathering estimates from vendors
- Creating jobs in Reggie
- Establishing timelines for copy, proofs, mailing list development and project deadlines
- Facilitating projects with marketing staff
- Writing job specifications
Reggie’s Role in Project Management

Reggie is the central information system that all marketing staff uses to keep up-to-date on projects, and to input their own information. Data is then available for others to see, such as registration deadlines, print quantities, proof approvals and directions for graphic designers and print vendors.

The result is an integrated system designed to meet joint objectives and financial goals for all project stakeholders.
Design Templates

Use of design templates for printed pieces, registration forms, Web sites and e-mail blasts

- Ensures designers are working with layouts that comply with post office mail regulations
- Speeds up design process
- Ensures standard information is always included (i.e., fine print)
Review Process

KUCE guiding principles of our review process

Our marketing pieces should be indicative of an organization selling education

- Free of misspellings
- Correct grammar
- No obvious errors in layout

Our highly educated audience will notice every error that we don’t catch

- PhDs
- Educators
- CUSTOMERS
Checks & Balances Reviewing

Piloted by project managers, once we have final approval from the program manager and client, the process begins. This includes:

- Initial project manager’s review
- Editorial review
- Registrations review
- Postal review
- Graphic designer’s review
- Marketing director’s review
- Project manager’s final blueline review
Checks & Balances Reviewing

Project managers work with graphic designers to fix errors as they pop up throughout the review process, if necessary. This requires a flexible design team.

The Result
Printed pieces are as error-free as we can make them, and clients are left with marketing materials they can distribute with confidence.
Integrate project management software for project tracking

Bridge the gap between administration and marketing

Reggie integrates project tracking with financial accountability

KUCE Comprises Seven Units
- Marketing
- Academic and Professional Programs (APP)
- Aerospace Short Course Programs
- Academic Outreach & Distance Education (AO&DE)
- Kansas Fire & Rescue Training Institute (KF&RTI)
- KU Continuing Medical and Nursing Education (CME and CNE)
- Kansas Law Enforcement Training Center (KLETC)

Enrollment Management
- Registrations
- Cancellations
- Refunds

Financial Management (KUCE Business Office)
- Details by event
- Various financial reports
- Financial accountability

Main University Financial Systems

Event Management
- Programs
- Marketing initiatives

Marketing Management
- Jobs by department
- JCN job-tracking transaction system
- Job details
- Deadlines

Microsoft Outlook
- E-mail notifications generated by entries in Reggie
Event Management

Program managers are able to:

• enter event data (e.g., event name, event date, type of audience, # of audience expected, budget plan) associated with a single project number;

• request a marketing planning meeting;

• review Marketing jobs’ status;

• view job charges as jobs progress in Marketing;

• approve and pay or request a meeting regarding job invoices.
Marketing Management

A Job Control Number (JCN) is automatically generated at the time a job is entered by either the program manager or project coordinator. All job processes and details necessary to complete each job are contained within this job record, such as:

• Job Tracer (timeline, instructions, proofs inflow/outflow, print specs, print dates, mailing dates)

• Print Order (qty, breakdown, print specs, due dates, vendor estimate, vendor job number, vendor invoice number and amount)

• Print-on-Demand Order (file name, job specs, due dates, vendor invoice number and amount)

• Work time and charges incurred by marketing staff

• Invoice
Research and Analysis

• Mail List Return on Investment (ROI) Analysis
• Customer Research/Analysis [e.g., Recency, Frequency, Monetary Value (RFM)]
• Invoice Management
Marketing Report Formats

We use a number of report formats in Reggie, all based on data we need to review practically daily.

Current Job Reports

- Print Jobs
- Photography Jobs
- FedEx Kinko’s Jobs (print-on-demand)
- Targeted E-mail
- News Releases
- Display Ads
- Web Work
- Mailing Jobs
- Monthly Jobs
Other Reports

- All open jobs (report reviewed weekly at the Marketing staff meeting)
- Jobs Complete – No Time (no staff time entries)
- Jobs ready for Invoice (requires action from project coordinator to review and generate the automated invoice)
- Jobs Needing Program Approval (review of jobs not approved for payment)
- Jobs Approved for Payment (history of paid jobs)
- Program Approval – Marked “No” (cue to arrange to meet with client to negotiate problem)
Q&A

Contact Points Used in Karate

wrist

knifehand

back of the fist

spearhand

ball of foot

instep

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