Higher Education Digital Marketing Maturity Assessment

Uncovering Your Data Driven Marketing Potential

By Rob Zaebst
The Modern Digital Marketing Maturity Model

A successful digital marketing strategy framework must align People, Process, Technology, and Data. Without these core elements, your strategy will be ineffective and likely cause confusion and frustration with your team. While you must define a vision, goals, and objectives when building a digital marketing strategy, these elements are only a starting point.

For example: Even if you have the right technology to create personalized communications coupled with a staff that knows how to use the technology, if your data is unorganized and you lack a governance process to properly manage the platform, no great strategic vision will succeed.

The most successful marketers both within Higher Education and outside can bring all these important elements to bear in order to drive Digital Marketing success. In today's digital world, they are data-driven and understand the importance of analytics to know which channels and tactics are driving their outcomes, and which aren’t. When marketers use a continuous cycle of strategic planning, campaign execution and review that includes analytical-driven insights, they are able to remain agile and continually improve.

About the Author

Rob is the former Head of Digital Strategy at a BigTen University where he worked in the Central Marketing and Communications office. He also has a corporate marketing background, most recently serving as VP of Digital Strategy and Marketing Technology.

He is currently an Industry Advisor at Salesforce, providing industry insight about how to plan, develop and implement Digital Strategy from a People, Process, Technology, and Data perspective for Marketing and Communications Departments at Higher Education Institutions.
The Modern Digital Marketing Maturity Model

The core components that define Digital Marketing Maturity are both technology-focused (CRM, Marketing Automation, Web, Analytics, etc.) and non-technology focused (Staff, Campus Coordination, Governance, etc.). The most effective digital marketers are able to bring these tech and non-tech elements together to drive digital marketing success. Following a People, Process, Technology, and Data framework, the essential elements of modern digital marketing maturity are:

- **Digitally-versed Marcom Staff** - Understanding of marketing technology landscape and how to enable outcomes
- **Campus Coordination** - Alignment with other departments and colleges across campus to drive a consistent constituent experience
- **Data/CRM Alignment** - Bringing data together from across campus for a single source of truth
- **Analytics** - Understanding both channel outcomes as well as constituent outcomes; attribution modeling
- **Marketing Automation** - Driving constituents through an automated, multi-step journeys to drive outcomes
- **Omnichannel** - Bringing constituent behavior from across different channels to amplify engagement further

To find out how developed your Marketing and Communications department is, answer the following 8 questions based upon your capabilities as they exist today, not where you would like them to be in the future.

For each question, if you answer A, give yourself 1 point; B, give yourself 2 points; C, give yourself 3 points, D, give yourself 4 points, E, give yourself 5 points. At the end you’ll add up points to see where your organization lands in terms of its maturity.

Once you determine your maturity level, the assessment lays out the tangible steps you should take to transform your digital marketing.
8 Question Assessment

1) Which word/phrase best describes your Central Marketing and Communications department’s current state-of-mind when it comes to discussing digital marketing. Topics such as: Marketing Automation, Analytics, Personalization, Constituent Journeys?

A. Rejection, incomprehension as to why this is important
B. Overwhelmed and confused as to where to start
C. Engaged, but somewhat frustrated from lack of progress after initial gains. Trying to determine next steps
D. Optimistic from progress that’s been made and an ability to show tangible outcomes from those efforts
E. Innovative to the point where the rest of campus looks to them to provide guidance and assistance unsolicited

2) What best describes the digital marketing staff currently in place to develop a digital marketing strategy, manage digital marketing platforms, and execute digital marketing campaigns?

A. No Digital Staff; Little Digital Knowledge among existing team
B. Limited: Some knowledge, but no defined digital positions; Very IT dependent
C. Digital Skills Present: No defined Digital Positions; Skills exist, but mainly with web developers or digitally savvy staff with other job titles
D. Independent Digital Staff: Small staff that covers various digital channels, but not full integrated with rest of marketing org
E. Integrated Digital Staff: Fully defined staff covering major platforms; Digital knowledge exists across non-digital job titles

3) Which statement best describes the type of analysis Marketing and Communications is currently answering when reviewing analytics (performance of campaigns)?

A. “I’m not sure what we should analyze?”
B. “What happened when we ran this campaign?”
C. “Why did [insert outcome] happen?”
D. “We know why we got the results we did, but what will happen if we run a campaign with [insert specific targeting options]?”
E. “We know what happened and why it happened, but what should we do moving forward?”

4) How much personalization is happening with relation to Marketing and Communications content and channels?

A. None: Channels operate independent of any existing constituent data, known or unknown
B. Limited: Form fields customize someone’s email greeting or specific text in an email, but otherwise doesn’t exist
C. Foundational: Constituent engagements are based on info we know about them, usually within a singular channel
D. Developed: Cross-channel personalization happens based upon previous interactions, but not necessarily in real-time
E. Real-time: In the moment, cross-channel personalization drives engagement that is built upon the foundation of a CRM or CDP
8 Question Assessment

5) Which statement best describes Marketing and Communications current state with data and CRM (Constituent Relationship Management)?

A. Not knowing where to start: no real CRM knowledge/applicability to Marketing
B. Limited: Know how to use a CRM/data to better segment, target, personalize, but don’t have technology, resources, staff to support
C. Foundational: CRM/robust data sets are being used for specific marketing projects to better segment audiences
D. Developed: CRM tied to all/most marketing campaigns to not only segment, but personalize at a 1:1 level
E. Advanced: Using a CDP (or similar) to combine CRM data with marketing data outside of CRM for a full 360 view of constituents

6) What level of Marketing Automation is currently in place for Digital Marketing Campaigns?

A. None: Emails are developed and sent as one-offs
B. Limited: Automated thank you emails are sent when someone fills out a form
C. Foundational: Multi-step journeys in place beyond a thank you email; External data brought in to help personalize
D. Developed: Multi-step journeys take into account actions from multiple data sources and channels to drive to specific goals/outcomes
E. Advanced: All marketing campaigns include a multi-step journey that eliminates “funnel leak” to drive engagement at all touchpoints

7) Which statement best describes how Marketing and Communications is currently working with IT as it relates to Marketing Technology?

A. “We know of the IT team, but haven’t engaged with them”
B. “We know who to reach out to if we need to and we’ve met with them on occasion”
C. “We have a standing meeting with them and work together on specific projects”
D. “We meet regularly with them to see where there is overlap in our strategic objectives to find areas where we can collaborate better”
E. “We are strategic partners that develop our objectives together based upon unified goals to bring campus marketing technology together”

8) How is Social Media being approached and managed today?

A. Minimal: Post content, but with no defined strategy behind why or when it’s posted
B. Outbound: Mainly to announce news, post content. Little/No Listening or Monitoring
C. Foundational: Defined Content Calendar; Listening isolated to mainly mentions
D. Integrated: Unified publishing, listening, monitoring with defined content strategy; Integrated with other marketing channels
E. Accelerated: Integrated stage elements with data integration to CRM, CDP, Marketing Automation
Results

Add Up Your Answers

Now that you have completed the assessment, add up your points, based upon how you answered each question:

- **A** = 1 point
- **B** = 2 points
- **C** = 3 points
- **D** = 4 points
- **E** = 5 points

Scoring Scale to Determine Maturity Stage

Uniting all your data in one database gives you a comprehensive overview and lets you track information to fulfil your mission with ease. Using tools that automate data entry processes will also improve accuracy and save you valuable time.

1. Reactive: ≤15 points
2. Developing: 16 - 23 points
3. Digitized: 24 - 31 points
4. Connected: 32 - 36 points

Next Steps

The next page outlines the overall Data-Driven Digital Maturity Model, allowing you to see which specific factors are driving maturity for Marketing and Communications as it relates to analytical, data-driven marketing.

In addition to the maturity model, the subsequent pages expand each stage further. Based upon the Stage your organization fits into, review that page in order to:

- Review questions you should answer in order to move to the next stage
- Understand what tangible steps you should take to become more digitally mature
# The Modern Digital Marketing Maturity Model

This maturity model is designed to help Marketing and Communications understand their current state as it relates to modern digital marketing, along with showing how they can become more mature in their approach.

<table>
<thead>
<tr>
<th>Mindset</th>
<th>1 - Reactive</th>
<th>2 - Developing</th>
<th>3 - Digitized</th>
<th>4 - Connected</th>
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| Digital Marketing-focused Staff | No Digital Staff: Little Digital Knowledge among existing team | Limited: Some knowledge, but no defined digital positions, very IT dependent | Digital Skills Present: No Defined Digital positions; Skills exist but mainly with web developers or digitally savvy staff with other job titles | Independent Digital Staff: Small staff that covers various digital channels but not fully integrated with rest of marketing org | Integrated Digital Staff: Fully defined staff covering major platforms, Digital knowledge exists across non-digital job titles |

| Data/CRM Concerns | Unknown: Not knowing where to start | Challenged: Need to automate the data for reporting purposes | High: Need to tie behavioral data in with CRM data to better segment, target, and personalize | Medium: Need to use CDP/DMP to derive better segmentation and targeting of the existing data | Limited: Data in good place, mainly need to ensure any new, additional data is continually brought in when created |

| Marketing Intelligence | Unorganized: "I'm not sure where to start" - Ad Hoc Reporting, No Analysis | Descriptive: "What Happened?" - Operational Reports/Dashboards | Diagnostic: "Why Did It Happen?" - Self-Service Analysis | Predictive: "What Will Happen?" - Data-Driven Predictions | Prescriptive: "What Should I Do?" - Actionable Insights |

| Omnichannel Personalization | Non-Existent: No personalization exists; Channels operate independently, Batch-and-Blast | Limited: Using form fields to customize email greeting or text, but otherwise limited | Foundational: Constituent engagements are based on info we know about them, usually within a singular channel, however | Developed: Cross-channel personalization happens based upon previous interactions, but not necessarily in real-time | Real-time: In the moment, cross-channel personalization drives engagement that is built upon the foundation of a CRM or CDP |

| Marketing Automation | None: Emails are developed and sent as one-offs | Limited: Automated thank you emails are sent when someone fills out a form | Foundational: Multi-step journeys in place beyond a thank you email; External data brought in to help personalize | Developed: Multi-step journeys take into account actions from multiple data sources and channels to drive to specific goals/outcomes | Advanced: All marketing campaigns include a multistep journey that eliminates "funnel leak" to drive engagement at all touchpoints |

| Social Media | Minimal: Post content, but with no defined strategy behind why or when it's posted | Outbound: Mainly to announce news, post content. Little/No Listening or Monitoring | Foundational: Defined Content Calendar; Listening isolated to mainly mentions | Integrated: Unified publishing, listening, monitoring with defined content strategy; Integrated with other marketing channels | Accelerated: Integrated stage elements with data integration to CRM, CDP, Marketing Automation |

| Campus & IT Alignment | Non-Existent: "I've got enough going on within Central Marcom to be able to work with the rest of campus" | Limited Project Basis: "I know who to reach out to" and "I meet with IT on occasion; as needed" | Ongoing Projects: "We have a standing meeting with certain groups (IT included) on campus and work together on specific projects" | Limited Strategy: "Most of campus is fully engaged, but getting strategic alignment is tough", "IT Strategy is separate, but we meet to determine where overlap exists" | Strategic Partnerships: "There is a strong campus marcom community that meets regularly and is strategically and technologically aligned" |
Stage 1

Reactive

Marketing and Communications would be considered lowest on the maturity scale. You’re probably just trying to understand where to start and what exactly you should be tracking. Analytics and ROI are not top-of-mind, and that is likely hurting your ability to influence and impact the rest of campus from a Marketing and Communications perspective.

Questions to answer in order to evolve:

- What are your main strategic objectives and how are you able to track progress towards those? Is that easy to determine?
- What are you needing to do today that requires manual processes to complete? For example, pulling data, sending out emails, sending out social media posts. Which parts of your marketing would you like to be able to automate? What are the biggest challenges you face that take the most time for your team to accomplish?
- What sort of additional things would you like to be able to track? Sources of traffic? Best performing content? Where does that data sit and how might you get that data?

Steps to Maturity:

- Define how your digital platform capabilities could help you achieve your broader marketing goals.
- Determine where all relevant data sits today and how you can access it on a consistent basis.
- Establish how you can have role(s) that are digitally-focused within Marketing, concentrating on things like Marketing Automation, Marketing Intelligence/Analytics, CRM, etc.

Campus Alignment - Understanding how your department would strategically think about data-driven digital marketing is a must-have before you likely can get adoption across campus. This strategy will serve as a roadmap for campus communicators and marketers. How can you then build out digital capabilities as it relates to people, process, technology, and data?

Analytics - Perform an audit to figure out where channel data (web, email, social media, advertising) exists and discuss who can get that either in an automated way, or at the very least, a repeatable way. Once that happens, determine how you can visualize that data.

Staffing - While your staff likely has graphic designers, PR/Comms professionals, content writers and other related positions, is there anyone on staff that works on digital marketing that isn’t a web developer/front-end designer? If you don’t have anyone, who on your team has shown an acumen towards understanding marketing technology that could be upskilled?
Stage 2
Developing

Marketing and Communications is on the lower end of maturity, but you’re making good progress. You’ve identified what’s happening in your marketing campaigns and which channels are driving progress. However, you’re not necessarily focused on analytics related to constituent outcomes at this stage.

Questions to answer in order to evolve:
- If you’re in place where you can access data on performance, can you answer the question, “What happened?” as it relates to your campaigns? Was it successful in attracting more visitors?
- You probably are able to locate and find your data in various channels. Now you need to determine how to automate that reporting. Do you have API access to automatically bring that data in? If not, can you automate an emailed report that is then automatically brought into your reporting system?
- Do you have an analytics reporting system? How can you visualize the data that you’re bringing in and have those dashboards automatically refresh instead of having to manually update them?

Steps to Maturity:
- Identify one larger, strategic partner on campus as well as a smaller department/college to align with as it relates to digital marketing technology and analytics. These initial partners will help to get others on campus to buy-in.
- Identify efficiency metrics like time-on-site, bounce rate, and click-through-rate for specific campaigns you’re running and compare those with other campaign you’re running.
- Uncover spikes in activity on your website, in social media, or with your email campaigns and determine what is driving those spikes.

Campus Alignment - Work with your selected campus partners to align on strategy, core martech platforms, metrics to track and how you report performance. These partners will be a good test-case that is willing to help refine how you’re reporting and can stress-test different ideas.

Analytics - Moving beyond vanity metrics (impressions, clicks, likes) that really only show volume-based analytics is going to be important. It’s also important to be able to track spikes in activity and what is driving those (i.e. a specific piece of content, thought leadership, or a certain type of press release). If you can understand what is driving activity spikes, you’ll be able to generate even more highly-engaging content.

Staffing - In order to be effective with data-driven, analytical marketing you need to have a Marketing Analytics Manager. This person will understand analytics platforms to compile the data you have for reporting purposes. Make sure that you’re not just bringing the data together and visualizing it, but have someone that brings actionable insights for the Marketing team to think of new ways to approach content and campaigns.
Stage 3
Digitized

Marketing and Communications has been able to make strides in certain areas, and you’re starting to see some benefits to having an analytics-focused, data-driven marketing strategy. However, those gains are likely only really happening within an individual department or college. Chances are, the rest of campus isn’t using the same types of digital platforms, or measuring their marketing campaign ROI in the same way. While you’ve started to think more about the constituent journey, you haven’t gotten to a point where you’re able to effectively measure constituent outcomes across their journeys.

Questions to answer in order to evolve:

- How would you gather constituent data (with their consent) from around campus and in different channels to build out personalized customer journeys?
- With better constituent data, what sort of segments might you start to create that can be used for personalized and targeted messaging? How might you take advantage of a Customer Data Platform (CDP) to accomplish this?
- How can you bring along the rest of campus with training, knowledge-sharing, and governance to drive adoption of marketing technology tools being used by a limited number of departments on campus, but not by everyone?

Steps to Maturity:

- Utilize campus partnerships you’ve already established to help see the benefits of partnering on data and analytics.
- Shift towards constituent outcomes in addition to channel outcomes. True audience segmentation and constituent journeys are a must-have.
- Expand Digital Staff either through new hires in Marketing Automation and Social, or through upskilling existing employees.

Campus Alignment - You should have some strategic partners on campus (either large departments like Advancement or Admissions, or larger colleges with multiple marketing/communications professionals) that you can lean on to co-present in meetings with other communicators to help reiterate the ways that you’re able track across different departments and drive efficiencies through shared technology. Also, how can you better align with IT to access and share data, along with better manage more complex marketing technology?

Analytics - To be at this stage, you should be first and foremost be using a CRM that starts to bring together data from across campus, helping inform the demographic and behavioral information about constituents. You’re likely doing a decent job getting Channel information together to report on, but you need to start thinking about how you can also show Constituent Outcomes. How can a Customer Data Platform broaden your ability to segment and refine how you target and report on that segmentation?

Staffing - At this stage, you’ve got dedicated staff supporting Digital Strategy and the subsequent metrics/analytics supporting your digital efforts. You need to determine if you can accomplish more of your digital goals through new staff in positions like a Marketing Automation Manager, Social Media Manager (focused not on content, but listening/monitoring or analytics), or by upskilling existing staff.
Stage 4
Connected

Marketing and Communications has progressed nicely and is using data-driven, analytical marketing to drive ROI and outcomes for the different campaigns they run. These campaigns go beyond vanity metrics and are evaluated outcomes for not only for one department or college, but include other parts of campus to fully understand performance. You’ve got good relationships with certain departments/colleges on campus that are helping you drive adoption of marketing technology beyond just an individual department or college.

Questions to answer in order to evolve:

● How can you evolve your analytics from predicting “what will happen”, to a place of “what should you do?” before running a campaign? What insights have you been able to gather from previous campaigns?
● How can you develop your broader marketing strategy with the input from the rest of campus?
● You’ve likely been able to get decent alignment between Marketing and IT. How can you extend that relationship to help how others on campus use marketing technology?
● How can you empower the rest of campus with customer journeys, analytics dashboards, and other assets that allow them to develop their digital maturity?

Steps to Maturity:

● Establish a plan to get parts of campus that have been skeptical, uninterested or unengaged. Your plan will need to highlight what’s in it for them and what they’ll get out of the partnership more than anything else.
● Determine ways to have Constituent Outcomes be the primary success metrics that you’re measuring. This will help in being relevant to the parts of campus that belong to those constituent journeys.
● Looking at the central marketing and communications department staff, ensure that your digital staff is brought in early to the planning phase of campaigns, since those are likely to include multiple steps that require alignment with CRM, Marketing Automation, Web, etc.

Campus Alignment - At this stage, you’re likely going to have some of the larger, more strategic departments engaged and be an important part of your digital strategy and data-driven approach. To truly become campus-wide, you’ll need to work to bring in the departments that haven’t been engaged to this point. Point to the successes with other parts of campus to show how it would benefit them as well. Consider bringing in departments/colleges earlier to your planning sessions.

Analytics - While you’ve gotten better at reporting on Constituent Outcomes, they’re likely still somewhat secondary to your Channel Outcomes. While certain campaigns and internal audiences will still need channel information, you’ll need to think about ways to have the Constituent Outcomes be the primary success metrics that you’re measuring to determine success of campaigns.

Staffing - Your Digital Marketing staff can’t be seen as auxiliary and only informed about campaigns as they’re about to launch. They need to be involved at the planning stage to understand which constituent outcomes will be key, how those will be measured, and the different approaches that have worked in the past. This requires the other staff on the marketing department to thoroughly understand the role that the Digital Marketing team plays to know how/where that can be of benefit.
Stage 5
Intelligent

You’re in rare air. Very few Marketing and Communications teams are truly using a data-driven approach to analyze performance from a constituent outcome and journey perspective. You probably have an attribution model that helps you see how Marketing and Communications is supporting the rest of campus. Universities at this stage have a well-established Center of Excellence that campus works closely with to drive adoption, consistency and collaboration across the university.

Questions to answer in order to evolve:

- What are the next innovations in digital marketing and how can those be applied to your current marketing landscape to increase personalization for your audiences?
- How you can attribute marketing campaigns to various department and college campaigns on campus?

Steps to Maturity:

- Fine tune established technology, processes and integrations to further enable the rest of campus around a fully digitized marketing strategy.
- Putting processes in place that help continue education and training for newer marketing and communications employees on campus.

Campus Alignment - At this stage, you have a well-established digital marketing that engages across campus. You’re going to need to ensure that new marketers and communicators understand the campus community that exists and how it benefits them to ensure continued campus buy-in. Focus on continuous improvement to continue to keep campus engaged.

Analytics - While you’re going to continue to develop analytics and provide insight into your marketing campaigns, you’re likely going to be thinking “How can I help enable the rest of campus?” Perform strategic planning with other departments and colleges to build, visualize and develop marketing plans that can simultaneously drive their specific outcomes, as well as driving your central marketing outcomes.

Staffing - You’ve got a well-established Digital Marketing team that guides and assists both central marketing as well as the rest of campus. At this stage, you’re evaluating what other areas of your data-driven digital marketing are lacking and how those gaps could be filled. These roles are likely not going to be directly responsible for core martech, but rather the important extensions of those core platforms that help drive adoption.
Want to learn more about Digital Marketing Maturity for Higher Education?

Contact Rob Zaebst at rzaebst@salesforce.com