MEASUREMENT PLANNING NOTES - Foreword

Thank you for attending the presentation on 'Measurement Planning' at the isbi Schools Marketing Conference 2018.

Obviously with such a range of experience in the room, with some attendees having little experience or knowledge of analytics and others having varying levels of understanding, it was difficult to present such a big topic in a short period of time and impossible to get into anything very specific about particular tools etc.

However I hope the overview discussing key components was helpful in mapping out the importance of Measurement Planning and the benefits of it... what you might measure and how… and in giving you a starting point for implementing your own plan.

Fortunately (one of the great benefits of our times) there is now a huge amount of free information available online... guides and tips and techniques etc… so you will be able to follow-up with your own research etc. And, as mentioned, please feel free to email with questions or queries and we will try to help. (There is also the inexpensive afternoon workshop running after the EMCdigital morning Regional Meetings if you want some help taking things further.)

That said, please find enclosed with these presentation notes a basic Measurement Planning spreadsheet (with some simple instructions below) based on the one devised by Fresh Egg which we use in our initial discussions with Schools & Colleges.

You can use this to reflect on your current communications strategy (whether admissions and marketing or perhaps alumni relations, fundraising, lettings etc) and how best to measure what you do going forwards.

Good luck and best wishes,

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MEASUREMENT PLANNING NOTES

Presentation notes from the isbi Schools Marketing Conference 2018, incorporating the slides used during the presentation.

1.0   DEVELOPING A DIGITAL MINDSET FOR OUR COMMUNICATIONS...

To set the context... marketing and brand reputation activities should form, with good communications:

- the foundation for initial marketing, admissions and enrolment,
- the basis for on-going parent and community communications in the school or college, and
- future communications with and engagement of alumni relations etc.

In this 'digital world' we should always keep digital in mind whether working with offline and/or online advertising, marketing and communications.

So when we place an advert in a local newspaper or on a poster we should create a web page... a 'landing page'... to which we direct people from that specific campaign. Similarly for a printed prospectus or magazine etc (directing people to more materials and information on the website). And with events we should create specific online registration forms, with 'thank you' pages that only appear to those who register or subscribe.

This way we can more easily target different types of visitor... to analyse their activities, interests and requirements and ultimately to identify who 'converts' (ie. completes actions we determine, like booking or enquiring or downloading etc) and who doesn't.

This will give us important insights we can use to review and improve our return on investment in marketing and communications, and also the option to target with 're-marketing'.

Our greatest asset is our website. It is the foundation of all activities and everything should point to it, as it is the one thing online we control and 'own'… and to help us manage it better we should have full control of the website via a 'Content Management System' (CMS).

We should be concerned every day with the 'User Experience' (UX) on our website and how well it is supporting our objectives.

We should aim to build and grow our web presence over time, keeping it distinctive and interesting and up to date, adding fresh, topical content (including 'evergreen' content of general interest to our target audiences, such as tips on choosing a school etc), adding more

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video and images, ensuring the navigation is user friendly and reviewing the likely 'journeys' our visitors may take through the website.

Fresh content should aid 'Search Engine Optimisation' (SEO) but good SEO also requires consideration of the search terms our target audiences will use, updating meta page titles and descriptions, increasing time on-site etc.

Online advertising, email, social and professional media and networking (Facebook, Twitter, Instagram, LinkedIn etc) all have their role where relevant, properly set-up and managed... increasing awareness, enabling interaction and engagement and (ultimately) bringing more prospective parents and students, key influencers, alumni etc to our 'owned' web presence.

From 'first contact' with prospectives through to alumni relations... overall it is about knowing our audiences, communicating effectively and providing good service... and that is greatly helped by better measurement, which starts with ensuring you have analytics in place and that you are using them, beginning with 'Measurement Planning'.

2.0   STARTING AT THE BEGINNING

It is helpful to begin with an overall School/College marketing plan that includes a basic 'SWOT' analysis (for on-going comparison and improvement) and a detailed digital marketing strategy (including ability to act, capabilities, resources, knowhow...).

The strategy should include:

* Descriptions of different target audiences.
* 'Unique Selling Points'
* Perception and image ('Tone of Voice' and style etc)
* Resources, staffing, support networks
* Aims and objectives (goals)
* Analysis and review… ROI and continuous improvement

Measurement First & Last

The process of creating, implementing and constantly improving a strategy and implementing Measurement Planning should answer some key questions such as:

* What purpose does the website serve?
* What works for your marketing?
* How do you know what works?
* What tools do you use?

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Consider for example if you were to be allocated an additional £10,000 for marketing that has to be spent in the next 3 months... would you know immediately where the budget could be used effectively? Would you have the processes in place to monitor and review that spend and improve on it as you go?

Having a Measurement Plan in place is a first (second and third) step to achieving this.

It can also help with:

* Getting out of a rut if you are unsure how to proceed.
* Dealing with a change of budget, offer (courses, types of student place etc), staffing etc.
* Assessing individual campaigns (in an ideal world you might create an individual Measurement Plans for each marketing campaign you run).
* Identifying and addressing new opportunities.

Google Analytics

Other analytics platforms are available but Google Analytics (GA) is free, widely used and very effective.

Most websites have the GA code installed but if not then we recommend you open a GA account now and have the code installed on your website (and also switch on 're-marketing tracking' so it is running in the background).

There are good guides online to help you do this. Simply give your unique GA code to your website developer, they should be able to install it in minutes.

The GA Dashboard

Many of us using Google Analytics tend to rely too much for our analysis and reporting on the basic dashboard... and Google recognise this, recently introducing more report summaries available in the overview.

The problem with the GA dashboard and basic reports is that they are not very accurate or helpful... they give an overview of trends but they are really just averages of the entire traffic and miss the real value to be gleaned from a bit more analysis.

And GA does not adequately report on social media and reputation tracking etc... for that you need to refer to the platforms you use (and their own analytics, such as Facebook Insights and Twitter Analytics) and also other monitoring tools etc to get a clear overall picture.

It is all too easy day-to-day to spend most of our time on delivery... dealing with enquiries, racing to send emails or update website content, placing advertising and reacting to sales

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calls... often making fast judgements on budget allocation, often taking the path of least resistance.

Of course it is especially hard when you are on your own with multiple roles:

"Amazingly enough... many Schools & Colleges rely on a single person, who is usually overwhelmed by other tasks, to check the amount of visitors, page views and bounce rate etc and to provide monthly reports showing a lot of graphs..."

However if we don't measure and analyse strategically and take actions as a consequence, we won't learn and improve.

Ideally measurement is about focus... infact it's about 'hyper focus' on conversions (desired actions) primarily and hyper focus requires time and effort but the rewards can be considerable with more depth and quality:

...of content
...of functionality
...of conversions
...of what it brings us... the quality of applicants and scholarships, bursary awards, improved retention, exceeding targets for boarding and day, staffing etc.

3.0   MARKETING ACTIVITY

In creating a Measurement Plan it helps to reflect on your basic marketing cycle, which probably comprises:

a) Acquisition

* From 'Owned' - web properties you own and control, such as your website, blogs and social media (albeit the latter may be ultimately 'owned' by a third party);

* From 'Earned' - publicity you gain (such as PR etc) through anything not directly controlled and not achieved via paid-for advertising;

* From 'Paid' - paid-for advertising to raise awareness and/or drive traffic to 'owned' media.

So we need to prioritise our time, resources and budget primarily between these three areas of activity which can be applied across 'Outbound' and 'Inbound' marketing:

* Outbound - Direct Mail, Calling, TV, Radio, Outdoor, Print, PR

* Inbound - Email, Online Advertising, Website, Onsite, Social

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It may be helpful to consider why 'Outbound' at all in a digital world…

There is some benefit to continuing to place a bit of newspaper advertising to encourage a newspaper to provide 'earned' coverage, and in using outdoor advertising to help raise awareness...

…but with up to 95% of prospective parents and students looking for schools online it is probably time to switch from spending 80% of the budget offline (predominantly outbound), to spending 80% on online (inbound) and just 20% on offline/outbound.

b) Behaviour

We need to consider behaviours in setting aims and objectives and how to achieve them:

* What are we expecting?

* What do we want?

* What is the optimal customer experience?

* How do we measure... satisfaction and/or outcomes?

c) Outcomes

What signifies value for us?

* Calls (calls from target audiences)

* Downloads (target audiences downloading resources such as a prospectus or an application)

* Forms (target audiences completing forms to book an open day, make an enquiry or complete a registration etc)

* Registrations (these are 'qualified leads')

4.0   THE ROLE OF THE MEASUREMENT PLAN

A good Measurement Plan...

* Defines objectives and maps them to goals, metrics and Key Performance Indicators;

* Defines what success looks like (and gets 'buy-in');

* Provides direction and the way ahead;

* Serves as groundwork for tagging of the website etc;

* Helps plan how to sort the data - what and why;

* Assists in optimisation and improvements.

Creating Your Measurement Plan

See the spreadsheet sent with these notes, and consider the example Measurement Plan worksheet, then work on the 'Your Plan' worksheet…

Step 1) Audiences...

Consider and define the audiences you are targeting... add them to the top level of the spreadsheet.

Step 2) Objectives (Goals)

Next consider your objectives (or 'goals') for each audience.

What is our website for? What outcomes do we want to achieve and why?

It helps to reflect on the basic goals tracked by Google Analytics and consider how they might be applied:

- 'Destination' goals (these are usually 'triggered' by people seeing particular web pages such as someone seeing a 'Thank you' page when they have completed an Open Day booking).

- 'Duration' goals, such as time on the website, time on a particular web page etc.

- 'Pages Per Session' (the user behaviour as they visit the website).

- 'Event' goals and tracking, triggered by activity within a web page or email, such as clicking on a link or watching a video.

Step 3) 'Key Performance Indicators' (KPIs)

Next you need to identify the 'Key Performance Indicators' (KPIs)... that enable you to achieve your objectives (goals).

Step 4) 'Measurable Metrics'

Next identify all the metrics applicable to each of your KPIs… there are two principle types of metric to consider...

* Micro Conversions

These are the behavioural interactions that don't necessarily represent a completed conversion or goal but that show you are on the right track and connecting with the target audience, such as:

- Prospectus download
- Video views
- Comments
- News views and follows
- Blog views and follows

* Macro Conversions

These are the behavioural interactions we really want to happen... because they represent a strong indication of interest and are closely aligned to our objectives (goals), such as:

- Call
- Contact form submission
- Newsletter subscription
- Event booking
- Registration
- Enrolment

5.0   CHANNELS & ATTRIBUTION

At this stage it is helpful to consider the concepts of 'Channels' and 'Attribution'.

Channels

You need to consider how much traffic each Channel (such as Email or SEO) brings you... but also the indicators within Channels, for example:

* Email – indicators within email might include the number of recipients, 'bounces', opens and the 'click through rate' etc.

* SEO – indicators within SEO might include traffic, page ranking, inbound links etc.

* Facebook indicators within social media such as Facebook might include the number of followers, a post's reach, engagement, likes, comments etc.

Attribution

Traditionally we have tended to 'attribute' success to the last action taken before an objective or goal is achieved.

For example if someone receives an email and clicks on the link in it to book to attend an Open Day, and they subsequently register, we might attribute that registration 'conversion' to the Open Day and/or email.

However prior to the attendance at the Open Day and clicking on the email link a lot of other factors may have contributed to the conversion and it is therefore vital to consider these, especially with regard to strategy and allocating budgets etc.

People attending an Open Day may have first clicked on an online advertisement, then explored the website and downloaded a prospectus, they may have subsequently returned various times via SEO and Social Media and they may have spend a lot of time watching videos on the website and on YouTube before subscribing to the email list and eventually clicking on the Open Day link.... all these factors may have contributed to the decision to attend the Open Day and then to register.

So the 'Last Click' interaction (the email link and/or online Open Day booking) is not the whole story, not by a long shot.

But equally the 'First Click' interaction (clicking on the online advertisement) does not tell the whole story either.

Ideally we need to know what happened between those actions, what Channels and indicators played a role in the process and effectively 'Assisted' the conversion.

The 'Assist' interactions are therefore important too.

(In football the midfielder who always lays the ball perfectly at the foot of his strikers could be the most valuable player on the team, not the players actually scoring the goals.)

Associated considerations include factors such as 'Top Conversion Path', Time Lag' and Path Length' etc.

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6.0　SEGMENTING & MULTI-CHANNEL FUNNELS

One of the great strengths of digital is the option to track and analyse actions and, although there is no 100% accurate way to do this, many analytics tools can help with more precise reporting of attribution, to identify which Channels are playing a role, where and how often.

The 'percentage contribution' helps us understand the importance of each Channel.

Look in your Google Analytics account for the 'Multi-Channel Funnels' report which helps to analyse attribution.

However looking at the 'Multi-Channel Funnels' report, and indeed all the other reports, in Google Analytics is not very precise for reasons discussed previously.

Additionally it is important to keep in mind with digital that tracking and reporting is dependent on each person using the same device, being the only user of the device and not deleting their cookies or limiting tracking.

Some people will use multiple devices to interact with your online presence (and thus appear to be multiple different users) or may delete their cookies or may share their devices.

These and other factors make 100% tracking and attribution impossible but we can still get some very helpful data from a high number of different interactions.

Infact we can identify groups of people with similar characteristics, behaviours and outcomes and then interrogate the data for those groups. In Google Analytics this is called 'Segmenting'.

Segmenting can be done in a simple way using pre-set segments in GA, such as 'Organic' which looks just at the data pertaining to those who arrived from organic or natural searches in the search engines.

However by using the 'Advanced' Segmenting option you can create much more specific, customised segments based on specific characteristics of interest to you particularly, and then interrogate the data.

The characteristics might be positive, or 'good quality'... such as trying to identify the positive things that contributed to Day or Boarding conversions etc.

Or you could look at negative, or 'poor quality'... for example, trying to identify what might have contributed to prospective parents and students not enquiring.

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We recommend using segments to get focus... but using custom 'Advanced Segments' to get hyper focus!

* Good = identify the 'Cost Per Lead'
* Great = identify the 'Cost Per Lead' by the 'Traffic Source'
* Amazing = identify the 'Cost Per Lead' ...by the Traffic Source, Location, Demographics, Type (Boarding, Day) etc.

This can also help identify problems to address... for example if a website has 50/50 visitors from mobile and desktop but 90% of form completions are by those on a desktop it suggests a problem with the mobile experience.

Ultimately using Advanced Segments should help you determine whether a spike in visitors and the factors that contributed to it has an impact on results or not... and enable you to investigate, review and improve.

7.0   OFFLINE TRACKING

Of course implementing your Measurement Plan is not all about Google Analytics and other online analytics platforms.

Other tracking methods that have a bearing include:

* Surveys and polling
* Agents
* Word of Mouth
* Customer Relationship Management (CRM) Tracking

Sometimes you may wish to use online techniques to try to bring offline activities online... and it helps to think creatively.

For example consider giving current parents who are keen to evangelise and serve as ambassadors specific landing pages URLs for the website, with content developed for those they speak to.

Then as their 'word of mouth' encourages prospective parents to look at the website you can not only track the number of visitors (referrals) but also how those people then use the website, ultimately even attributing conversions to the original offline source.

8.0   REPORTING

Ultimately Measurement Planning and the associated processes, tools and understanding should dramatically improve your reporting.

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When preparing reports try to focus on:

* Talking about OUTCOMES

* Making OBSERVATIONS

* Making RECOMMENDATIONS

* Identifying and considering TRENDS

9.0   BE 'DUMB'!

Ultimately try to make what you do day to day:

* Doable

* Understandable

* Manageable (Measurable)

* Beneficial

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I hope this is helpful. If you have any questions or enquiries please don't hesitate to drop us an email and we will try to help.

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Good luck and best wishes,

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