A Small Business Expansion and Sustainability Plan

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A Small Business Expansion and Sustainability Plan

Alexandra Meraz

An Interactive Qualifying Project submitted to the Faculty of WORCESTER POLYTECHNIC INSTITUTE in partial fulfillment of the requirements for the degree of Bachelor of Science

WPI

Advisor: Karen Kashmanian Oates
Sponsor: Success for Higher Education
Amy Marie Shachter - Founding Partner

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Executive Summary

Success for Higher Education (S4HE) is a higher education consulting firm, founded by two academic leaders. Higher education consulting firms provide a range of services to institutions. They improve institutions at the administrative level in order to improve the education provided to students. The goal of this report is to create a business strategy plan that focuses on social media marketing for S4HE.

In order to accomplish this, we gathered background information on platforms and social media, services by traditional consultants, business strategy, and S4HE partners and associates. Next, online research was conducted on the marketing identities of S4HE and its competitors. We performed an online presence analysis on S4HE and its competitors and scored each competitor in a table with the following categories: call to action, usability and organization, style and format, content, search optimization, and social platform utilization. These categories were determined through the background research conducted on how to have a strong social media presence. In addition, a survey was created and distributed to S4HE partners and associates. This survey was used to gather the vision and expectations for the marketing plan. From these methods resulted in information on S4He’s weaknesses and strengths with regards to online presence. The results found that S4HE had a weak online presence compared to its competitors. These weaknesses mainly involved website design and format and the lack of a call to action. Moreover, S4HE was not utilizing social media and did not show up in search engine results related to higher education consulting. In addition, the surveys provided insight on S4HE the company, its strengths and mission.

With all of the information gathered, a marketing plan was constructed that took into account all of the research conducted throughout the project. The business strategy included an executive summary, an elevator pitch, a company mission statement, a strengths weaknesses, opportunities, and threats analysis, a list of goals, key performance indicators, a summary of target customers, an industry analysis, a competitive analysis and advantage section, a team section, an operation plan, and financial projections.

Ultimately, the business strategy provides a summary of S4HE and the steps necessary to strengthen their online marketing. The strategy is personal, simplified and customizable to S4HE’s needs and resources. Overall, this project was able to accomplish its specified goal and provide a plan, a deliverable, to S4HE that can be returned to and edited as time goes on.
A Small Business Expansion and Sustainability Plan

Abstract

S4HE’s founding partners are values driven academic leaders committed to institutions’ success. Together with their team of associates, they bring years of experience as faculty members, deans, directors, and provosts, as well as, leaders in government, STEM, and private industry. Their goal is to help institutions create the environment that maximizes the skills of an institution’s community and allows institutions and their community to achieve success. A description of their services includes a focus on faculty development and hosting institutes. S4HE champions best practices in ethical and inclusive decision-making and celebrate the combined successes of the those they serve. S4HE helps institutions envision and implement the changes needed to reach their goals. Creating the business plan for social media uncovered the importance of website design and S4HE’s weaknesses compared to its competitors’ online presence. Web presence analysis and a survey were conducted. Thus, a business strategy was created so that S4HE could work towards a more competitive online presence.
I would like to thank S4HE for sponsoring this project. Thank you Karen Kashmanian Oates for advising this project.

I would especially like to thank Amy Shachter, Jay Labov, and Ellen Goldey for their time spent filling out the survey.
Contents

Executive Summary i
Abstract ii
Acknowledgements iii
List of Figures vi

1 Introduction 1
1.1 Industry .................................................. 1
1.2 Services .................................................. 2
1.3 Goals .................................................. 5

2 Background 6
2.1 Platforms and Social Media ................................. 6
2.2 Services by Traditional Consultants ....................... 8
2.3 Business Strategy ........................................ 9
2.4 S4HE Partners & Associates ............................... 10
2.5 Goal Statement ........................................ 11

3 Method 12
3.1 Online Research .......................................... 12
3.2 Survey .................................................. 14

4 Results 15
4.1 Online Research .......................................... 15
4.2 Survey .................................................. 16

5 Recommendations & Discussion 18
5.1 Web Presence Analysis .................................... 18
5.2 Survey .................................................. 24
List of Figures

1.1 Success for Higher Education Logo ........................................ 1
1.2 Success for Higher Education’s Scope of Services ..................... 3
1.3 Day 1 Content for VBAL Institute ......................................... 4

3.1 Template for Web Presence Analysis ..................................... 12
3.2 Template for Search Optimization Analysis ............................ 13

4.1 Web Presence Analysis Results ............................................ 15

5.1 Huron Call to Action ....................................................... 19
5.2 Keeling & Associates Call to Action .................................... 19
5.3 S4HE Call to Action ....................................................... 20
5.4 Reuse of an image on Keeling & Associates Website Ver 1 .......... 21
5.5 Reuse of an image on Keeling & Associates Website Ver 2 .......... 21
5.6 Image blocking text on Keeling & Associates Website ............... 22
5.7 Search Optimization Analysis Results .................................. 24
5.8 S4HE Homepage Prototype .............................................. 30
5.9 S4HE Homepage Prototype Scrolled Down ............................ 30
5.10 S4HE Menu Organization Prototype ................................. 31
5.11 Sample Linkedin Post ................................................... 32
5.12 Sample Infographic ..................................................... 33
Chapter 1: Introduction

Success for Higher Education (S4HE) is a higher education consulting firm. S4HE was founded by academic leaders in order to provide services that help higher education institutes achieve their goals and provide individual professional development. Figure 1.1 shows their logo.

Figure 1.1: Success for Higher Education Logo
[logohands]

1.1 Industry

Currently, higher education institutes struggle to successfully deliver on their promises to students. From budgetary constraints to inexperience with changing student bodies, the challenges grow each year. (Blumenstyk, 2014) Higher education experts have predicted the mass closings of institutions across the country. (Horn, 2018) Many institutions find that resources are scarce for professional development of faculty. In addition, some institutions ignore evidence based research that could benefit the learning models that would encourage their students. Consulting firms like S4HE help institutions through these struggles by providing varied services as well as a focus on the professional development of faculty and staff leaders.

Higher education consulting generally falls into three categories. There are consultants who help parents guide their students toward academic success. For example, a parent can reach out to a firm like Lori Day Consulting for help in choosing the right school for their child and navigating financial aid. (Sheffer 2002) There are consultants who work with private companies to create software and technology for higher education institutions
to use. (Sheffer 2002) For example, Huron Consulting Group is partnered with software such as Workday or Oracle. (Huron, n.d.) They also provide implementation services for institutions struggling to adapt to the software. Lastly, there are consultants who work with institutions to fix systemic problems and advise their administration. S4HE and other consulting firms such as Kennedy & Company, Keeling & Associates, and Huron Group fall into the last category.

Colleges and Universities hire consulting firms for a plethora of reasons. Experts have predicted that roughly 25% of colleges and universities will fail in the next decade or two. ("Experts predict 25% of colleges will “fail”", 2019) Many colleges run deficits and the average tuition discount has gone up to dangerous levels. ("Experts predict 25% of colleges will “fail”", 2019) Higher education consulting is a relatively small industry, but their consult is in higher demand every day with the rise in challenges institutions face. Often times consultants come from academic backgrounds and have leadership experience. For example, S4HE is lead by two academic leaders. Karen Kashmanian Oates and Amy Shachter are S4HE’s partners. Oates is a nationally recognized consultant, scientist, science educator, and higher education leader. (S4HE, n.d.) Shachter’s roles have ranged from center director to associate dean to provost-level administrative appointments. (S4HE, n.d.) In addition, S4HE associates Ellen Goldley, and Jay Labov come from academic backgrounds.

The essence of a higher education consulting firms work is identifying problems and designing solutions. Consultants are useful for bringing a fresh view to business practices, especially when institutions have been relying on traditions that may no longer work. A typical consulting process ends in a written research report with recommendations to the client. Consultants typically work with a provost, vice president, or dean of an institution. An effective consulting group needs to excel at problem solving, analytical thinking, writing, communication, planning and organization. (Sheffer 2002) Ultimately, the purpose of higher education consulting is to improve institutions at the administrative level in order to provide students with a superior college experience.

1.2 Services

Services provided by higher education consulting firms range from general strategic planning, leadership development, to financial and technology consulting. S4HE focuses on value driven initiatives that empower faculty and administration to deliver higher education to all students.

A unique service provided by S4HE is the institutes S4HE hosts. Additionally, consultants go to a university; however, S4HE’s institutes invite colleges and universities to visit them instead. For example, the Values-Based Academic Leadership (VBAL) Institute provides information on fostering academic leadership to those who attend. These
institutes have been hosted by Roosevelt University in 2017 and Broward College in 2018. The brochures for Broward and Roosevelt institutes are included in appendix A.1 and A.2. In addition, the full agenda for the Broward College institute is provided in appendix A.3.

The following figure shows the scope of services S4HE provides. The figure shows their range of strategic initiatives, consulting and coaching, and workshops.

![Scope of Services Diagram](image)

**Figure 1.2: Success for Higher Education’s Scope of Services**

In addition, the Annual VBAL institute held in 2019 at Roosevelt University has the following content for day 1, provided in Figure 1.3. S4HE describes their institute as an event where “participants will explore the practices of a values driven leader, one who can produce transformative change by creating an environment of honesty, truth,
and trust... [They] We take a holistic approach to all levels of academic leadership by grounding theory, practice, and institutional mission in personal and professional values to foster authentic, successful leadership.” (SHPE, n.d.) The full agenda for the Roosevelt University Institute can be found in appendix A.4.

Figure 1.3: Day 1 Content for VBAL Institute
[day1cont]
1.3 Goals

The goal of this research paper is to create a business strategy plan that focuses on social media marketing for S4HE. In order to attain this goal, we will research the online marketing identities of some of S4HE’s competitors. We will survey S4HE’s associates to understand their social media thoughts and suggestions. Finally, we will use this information to create the business strategy which will include a set of recommendations for S4HE.
Chapter 2: Background

The following background material has been assembled in order to create a foundation for the research needed to complete the stated goals of the project.

2.1 Platforms and Social Media

Online platforms and social media are more crucial than ever in regards to showcasing services and encouraging potential clients to engage. Different firms use their websites to clearly explain their services, which makes it easier for a potential client to know if they can be helped by that firm. Moreover, a website create a sense of authority and professionalism if well crafted. Online marketing is a vital tool for any business; this form of marketing is versatile and cost-effective. These properties are especially useful to smaller businesses like S4HE. This form of marketing has become so widespread. 97% of marketers are using social media to reach their audiences. (Smith, 2019)

Online marketing promotes brand recognition, increases traffic, and reaches specific audiences. Moreover, different metrics can be tracked on a website or social media profile such as website clicks, testimonials, email sign-ups, shares, top pages. With the importance of online marketing, it is critical for any business to have a strategy in place.

Below, we review the function and summarize different online platforms. Overall, online platforms can provide a low cost tool for reaching a wide audience and setting a business apart from its competition.

Websites

As previously mentioned, websites create a sense of authority and professionalism. They serve as a hub of knowledge for potential clients looking to learn about a company. Useful information on a website includes scope of services, mission statement, business team, testimonials, and contact information. Businesses typically use other platforms in order to direct clients to the website. The vast majority of businesses will have a website before using any other platform. Of all the platforms mentioned, websites are the most customizable and versatile.
Due to the wide range of options a website provides, it is critical that a website have a neat and organized format that is pleasing to the eyes. For many companies, a website is the first impression to a client. According to Christina Hawkins, a coach and mentor for digital marketing freelancers, a professionally designed, well organized, comprehensive website is the center of a marketing strategy. (Hawking, n.d.) Hawkins describes how a website serves as a reflection of a brand and how data tracking can be useful.

Social Networks

Social Networks provide a way to connect with people. (Foreman, 2017) Examples of social networking sites include Facebook, Twitter, and LinkedIn (facebook.com, twitter.com, linkedin.com). These sites are some of the widest reaching platforms with millions of users and businesses utilizing them. These platforms can be used for customer service or promoting brand awareness.

Using these networks, requires consistent publishing of content. Many of these websites have algorithms that favor posts with a large amount of engagement. In addition, businesses can pay for their posts to reach a larger scope of people in some websites. These websites allow for targeted ads among a crowd of millions. The Australian government offers resources to business on their website, including a section of the website dedicated to social media and its benefits. Benefits include revenue streams, brand development, attracting customers, research, networking, recruitment, and search-engine discoverability. (Australian Government Business, 2018)

Media Networks

Media networks are designed for users to share photos, videos, and other media. (Foreman, 2017) Examples of media networking sites include Instagram, Snapchat, and YouTube (instagram.com, snapchat.com, youtube.com). These platforms are a good way to increase visibility and engage audiences with content that doesn’t require as much reading. However, these platforms require more resources to be implemented successfully. For example, quality cameras and photography skills make a big difference in whether audiences will take an interest in a company’s media. Media networks are useful because the human mind is more likely to retain information gathered through a visual medium as opposed to through text. (Dale, 1969)

Blogs

Blogs are used to publish content online. (Foreman, 2017) Most blogs are in a similar format to news articles. Companies can use blogs to carve a niche as a thought leader in their industry. There are countless blogging platforms on the internet such as WordPress
and Tumblr (wordpress.com, tumblr.com). For simplicity, a blog can be added to a website and the content creation can boost a website’s ranking in search algorithms.

Blogs can drive visitors to the website when a person searches a question about the industry and finds the answer in a website’s blog post. For example, several questions about higher education consulting lead to results from Huron Consulting Group’s blog. Blogs can also boost social media presence by giving businesses a reason to post and link back to their website. They establish trust and authority for a business, because the content can establish a company as an expert in their field.

Other

Lastly, there are many platforms that aren’t as commonly used by most businesses. There are forum discussion sites like Reddit (reddit.com). Some businesses run ads on these sites because of the high traffic and some businesses foster a community of passionate consumers on forums such as these. Another type of platform is the interest-based networks that cater to users with a specific interest or hobby. An example of this is the website Goodreads which caters to people interested in books and reading (goodreads.com). There are some Consumer review networks such as Yelp that some businesses can benefit to having a consistent presence on (yelp.com). Social shopping networks like Etsy provide a platform for selling unique creations, however, these platforms are mostly for physical goods (etsy.com).

There are many more platform types that some businesses utilize in their marketing strategies. Later in this report, we will be assessing the usefulness of various platforms in order to determine which platforms should be implemented in S4HE’s marketing strategy.

2.2 Services by Traditional Consultants

Higher education firms like S4HE provide a variety of services; the observed competitor firms - Huron Consulting Group, Kennedy and Company, Keeling and Associates- perform on a purely administrative level. Meanwhile, S4HE has more general faculty leadership development and individualized mentoring available.

When it comes to general strategic planning, a consulting firm can deal with different types of problems depending on consultants’ experiences. In addition to their specific services, the firms observed provided a service under the name of general strategic planning which could encompass most concerns an institution would have. However, a consulting session would verify whether a problem was in a company’s scope of services. Every institute is unique and can bring up a specific issue to a firm, and the firm will spend time understanding the issue. One of the greatest challenges for an institution is managing finances. Many institutions hire consultants in order to assess where they can save
money. Resource management is critical to the well being of a higher education institution. Another offering of many firms is software or technology in order to streamline administrative processes. In addition, faculty leadership and development is a core service offered by consulting firms. This service ranges from developing the top leaders of the institution to helping all faculty work more efficiently together. Consultants can also help with transitions in power or workplace conflicts.

Moreover, consultants can offer specialized knowledge. Some consultants offer special help with creating or improving research departments and have experienced leaders to show the way. A common service focuses on leadership development. S4HE shows a more specific approach to coaching and advising in professional development of colleagues. S4HE also provides individualized mentorship which isn’t common in the services provided by other firms. Consultants can help institutions with accreditation. Some consultants can fill leadership roles and allow an institution to outsource the hiring process. Ultimately, there are many broad services that most consulting firms offer and consultants unique experience can lead to more specialized services.

2.3 Business Strategy

A business strategy defines a direction and decides how to allocate resources in order to pursue the strategy. It establishes a mission, vision, goals, and action plans. A business strategy is essential so that a company can work smarter, not harder and grow with purpose. The strategy can help a company understand their current situation and where they want to go, serving as a map for their business. The business strategy is an important, dynamic document, that sets a plan for achieving goals.

The following couple of paragraphs describe a typical strategic plan according to Dave Lavinsky, an entrepreneur and Forbes contributor. A typical strategic plan should consist of an executive summary, an elevator pitch, a company mission statement, a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, a list of goals, key performance indicators, a summary of target customers, an industry analysis, a competitive analysis & advantage, a team section, an operations plan, and financial projections. An executive summary is written last to help readers understand what the business strategy contains. The elevator pitch and company mission statement help the company understand who they are what they are trying to project in the strategy. A SWOT analysis identifies strengths, weaknesses, opportunities and threats. The list of goals sets the direction for the strategy. The key performance indicators help the business understand how they are performing and whether they need to adjust the plan. Target customers are important to identify, because this helps focus the marketing efforts. The industry analysis helps to ensure the market size is growing, and can help a business realize that it might need to diversify if the market is not growing. The competitive analysis helps define the company’s
advantages over competitors.

A summary of the marketing plan should be included in a typical business strategy. However, for our sponsor, this research and report will focus entirely on marketing for the business strategy plan. Next, the team section allocates human resources towards executing the plan. The operations plan section consists of initiatives, projects, and strategies that will be acted upon, in order to achieve the goals. Finally, the financial projections assess the potential results of the actions taken in the operations plan. This section can also contain the goals for what is being tracked, such as how many new customers to be attracted each month. Many companies develop a strategic plan each year, and update it monthly as they come to understand the effects of their planning and can plan more accurately for the future. (Lavinsky, 2012)

In order to create a business strategy, a business should know who they are. They should know their competitive advantage. The plan should consist of an executable plan with concrete goals; however, the plan should also be flexible. Moreover, the company should be able to analyze their results and improve their strategic plan as they move forward.

2.4 S4HE Partners & Associates

As part of this project, we surveyed the partners and associates of S4HE. This section provides background on the associates we surveyed.

Amy Marie Shachter - Partner

Amy Shachter has extensive academic leadership experience. Shachter is a partner of S4HE. She received her baccalaureate at Knox College and earned her Ph.D in inorganic chemistry at the University of Colorado-Boulder. She served in a variety of roles from center director, associate dean, to provost-level administrative appointments. She has experience in development of new programs, academic majors and minors as well as University-wide centers with special expertise in sustainability education, undergraduate research programs as well as multi-department major STEM strategies. In addition, she excels in faculty affairs and collaborative governance issues. She is a creative problem solver and expert mediator. Shachter values inclusivity and leads programs supporting women faculty and students in STEM. Currently, Shachter is Senior Associate Provost of Research and Faculty Affairs at Santa Clara University. She is also an Associate Professor of Chemistry and Biochemistry at there.
Karen Kashmanian Oates - Partner

Karen Kashmanian Oates is a nationally recognized consultant, scientist, science educator, and higher education leader. Oates received her Ph.D at George Washington University Medical Center in Biochemistry. She served as deputy director of the Division of Undergraduate Education. She has also served as an inaugural provost at Harrisburg University of Science and Technology and an associate dean at the College of Integrated and Interdisciplinary Studies. Oates brings a variety of perspectives on faculty development, career and executive counseling, leading change and setting a collaborative culture as well as service learning and business-higher education partnerships.

Ellen Goldey - Associate

Ellen Goldey is another academic leader whose experience includes Dean, biology department chair, and developmental neurotoxicologist. Goldey is an associate of S4HE. Goldey earned her BS degree from the University of the South (TN) and her MS and PhD degrees from Miami University (OH). With funding from NSF and private foundations, she has led projects to create interdisciplinary learning communities, reform undergraduate STEM education, make positive use of assessment evidence, and promote cultural pluralism. Currently, she is Vice President of Academic Affairs and Dean of the College at Centre College (KY).

Jay Labov - Associate

Jay Labov served as a member of the staff of the National Academies of Sciences, Engineering, and Medicine for the past 23 years, most recently serving as Senior Advisor for Education and Communication since 2008. He directed or contributed to some 30 National Academies reports focusing on undergraduate education, teacher education, advanced study for high school students, K-8 education, and international education. He has received various awards for his work in leadership, science, education, and civic engagement.

2.5 Goal Statement

The goal of this project is to create a social media marketing plan for S4HE, in order to improve their online image and attract new clients. The goal is to create an online presence that rivals that of their competitors. In order to achieve this goal, we will research online marketing, survey the S4HE partners and associates to find out their social media suggestions, and create a set of recommendations for S4HE.
Chapter 3: Method

This chapter focuses on the methods used to attain the aforementioned goals of this report. Online research and a survey were used to gather the results.

3.1 Online Research

A major goal of online research was to assess S4HE’s online presence compared to its competitors. Using background information on online marketing, we determined essential criteria of what makes for a strong online presence. The following template was developed, shown in Figure 3.1, in order to rank these criteria. The criteria was developed with research from Shanna Mallon’s article on ways to evaluate the quality of a website. In it, Mallon describes 5 criteria, what they consist of, and why they are important to the user experience (Mallon, 2014). In addition, a criteria was added that quantifies the competitor performance in social media websites - other than their own websites- in comparison to its competitors. The following sections describe each criteria and what affects a company’s score.

![Figure 3.1: Template for Web Presence Analysis](image)

Figure 3.1: Template for Web Presence Analysis
Call to Action

A call to action should demonstrate the purpose of the website clearly. The design of the website should encourage the user to act.

Usability

The usability of a website depends on technical aspects like mobile compatibility, page loading times, working links, and browser compatibility. In addition, organization of information affects usability.

Style

Style should be consistent and have a target audience. Photos and decoration should help the website’s message.

Content

Content should have good readability, be useful to the user, and be concise but still useful. The content should be easy to find.

Social Platform Utilization

This section reviews what platforms are being used by the companies in addition to their website. Are they being used well? Do they receive feedback and post content often?

Search Optimization

This section focuses on whether a company will appear on the front page results when certain terms are searched. In order to test this, we will be testing various search terms and noticing which companies show up on the first page of the Google search results. The following template was created to keep track of the results.

<table>
<thead>
<tr>
<th>Company</th>
<th>Success for Higher Education</th>
<th>Huron Group</th>
<th>Kennedy &amp; Company</th>
<th>Keeling &amp; Associates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Term 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>...</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 3.2: Template for Search Optimization Analysis
3.2 Survey

In order to create the survey, research was done to establish what information was needed to create a business strategy. Dave Lavinsky’s strategic plan template established the different parts of a strategic plan (Lavinsky, 2013). The template describes a few concepts that a company should understand about itself. This includes strengths, goals, and visions. Five free response questions were chosen, a separate set for partners and associates with some overlapping questions.

The following are the questions for S4HE partners:

- What is your vision for S4HE?
- Who is your ideal client?
- What is your primary competitive advantage?
- What are your expectations for a marketing strategy?
- What feedback have you received on the current website?
- What networks might S4HE use to market your skills?

The survey was distributed to S4HE partners and associates. The questions were emailed to the respondents: Karen Oates, Amy Shachter, Ellen Goldey, Jay Labov, and Theo Koupelis. An IRB exception was granted and can be located in appendix B.2.
Chapter 4: Results

This chapter reports the results of our methodology described in the previous chapter.

4.1 Online Research

The results of our web presence analysis are shown below. The following sections summarize the overall results for each company which will be discussed in depth in the next chapter.

<table>
<thead>
<tr>
<th>Criteria Company</th>
<th>Call to Action</th>
<th>Usability and Organization</th>
<th>Style and Format</th>
<th>Content</th>
<th>Search Optimization</th>
<th>Social Platform Utilization</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Success for Higher Education</td>
<td>6</td>
<td>9</td>
<td>5</td>
<td>8</td>
<td>0</td>
<td>0</td>
<td>28</td>
</tr>
<tr>
<td>Huron Group</td>
<td>10</td>
<td>8</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>58</td>
</tr>
<tr>
<td>Kennedy &amp; Company</td>
<td>8</td>
<td>10</td>
<td>9</td>
<td>10</td>
<td>6</td>
<td>5</td>
<td>48</td>
</tr>
<tr>
<td>Koehler &amp; Associates</td>
<td>10</td>
<td>7</td>
<td>9</td>
<td>10</td>
<td>2</td>
<td>4</td>
<td>42</td>
</tr>
</tbody>
</table>

![Table of Web Presence Analysis Results](image)

Figure 4.1: Web Presence Analysis Results

Success for Higher Education

Success for Higher Education performed the most poorly in the analysis. Ultimately, its worst categories were due to S4HE’s lack of social platform utilization and the fact that S4HE never appeared in search results. S4HE’s website performed well in usability and organization as well as content.

Huron Group

Huron group was the best performer in the group and exceeded in every category. The only category it didn’t ace was in usability and organization. This was mainly due to errors and issues found in a screening of the website.
Kennedy & Company

Kennedy & Company was the second best performer. The website alone performed well but it’s social platform utilization and search optimization were poor compared to Huron Group.

Keeling & Associates

Keeling & Associates was a close follow up to Kennedy & Company, performing similarly in many categories. Similarly to Kennedy & Company, Keeling & Associates performed well in the website categories; however, it also didn’t perform well in social platform utilization. It fared even more poorly in the search optimization category but not as poorly as S4HE.

4.2 Survey

The following consists of a summary of the results of the survey sent to S4HE partners and associates. Survey Results can be found in Appendix C.1.

What is your vision for S4HE?

A common theme for the responses was that the respondents wanted s4HE to be seen as reliable and skilled consultants. Another aspect of the vision consisted of having "a stable set of clients" and to be "an active consulting firm".

Who is your ideal client?

The responses to this question mainly echoes the desire of S4HE partners and associates to have steady clientele. Two respondents wrote about getting to know an institution and having a longstanding relationship. The other two responses were more about the client having clear goals and recognizing their challenges. Furthermore, these responses expressed the need to work collaboratively and serve as guidance for the clients.

What is your primary competitive advantage?

All respondents mentioned their experiences as their advantage or as part of their advantage.

What are your expectations for a marketing strategy?

The responses for this question included that the strategy be "simple, clear, and impactful." Another response wants the strategy to bring new business. Another response
wants the strategy to be "up to date, refreshed and to the point."

What feedback have you received on the current website?

The respondents who have received feedback wrote that the site was not up to date, modest, and lacked focus.

What networks might S4HE use to market your skills?

All the responses talked about professional organizations and mentioned specific ones such as SENCER.
Chapter 5: Recommendations & Discussion

This chapter discusses the results and establishes the recommendations of this report for S4HE.

5.1 Web Presence Analysis

The following sections discuss the reasoning for the judgements shown in the web presence analysis results.

Call to Action

The analysis found that S4HE’s competitors all had a clear call to action and the design of the website adequately encouraged the user to act. The purpose of each competitor was clear through a click overview of the company’s homepage. S4HE’s purpose is clear on the homepage; however, S4HE lacked a clear call to action with no use of an action verb (as shown in Figure 5.3). Huron Group and Keeling & Associates were more clear about their call to action and had their contact info linked at the forefront of their homepages. Huron Group gives a brief description of what they do and establish their authority in the industry; then, they invite the user to contact them or fill out a request for proposal. Meanwhile, Keeling & Associates invites the user to read about the company and get to know them. This is a good strategy for Keeling & Associates because it is likely less well-known than Huron Group and would benefit from encouraging website visitors to look around and learn more about them.

Ultimately, S4HE would benefit from having a strong call to action such as encouraging the visitor to contact them, or guiding them to other parts of the website. Figure 5.1 shows Huron’s front page for the higher education consulting section of their website. The first thing this page does is briefly explain their purpose and tell the visitor they have worked with hundreds of institutions. Then they have a few calls to action such as “contact us”, “RFP”, “Read More”, and “Sign Up Today.” Many websites use buttons
such as these to attract the user’s eye. The simple design of this page encourages the user to take action.

Keeling & Associates call to action, as shown in Figure 5.2, is clear and is the first thing on its homepage. Overall, their website contained a lot of information and a lot of it could be found by scrolling down on the homepage.

Lastly, S4HE’s home page doesn’t include a call to action. The menu bar gives visitors the option of clicking around and seeing what else is on the website, but this can be further encouraged by a call to action. S4HE could encourage the user to contact them. Another call to action could be directed towards learning more about it’s institute’s since that is
a unique event they host. As a smaller business, their website needs to do more work to show their trustworthiness and credibility in the industry. A call to action can lead visitors towards that conclusion.

![S4HE Call to Action](image)

**Figure 5.3: S4HE Call to Action**

### Usability & Organization

In order to determine scores for this category I employed the use of website called PowerMapper which screens a website for issues. The following figures show the various competitors’ results for browser compatibility. A lot of the websites had issues with older browsers which isn’t as much as an issue since most browsers get updated frequently. In addition I looked at mobile websites which is important as many people visit websites on a mobile phone. Overall, the mobile sites were all formatted correctly and had no issues.

Websites were mainly ranked based on their error percentages from PowerMapper, because of the consistent organization.

With regards to organization, all the competitors had a similar menu bar and organization. The menu bar typically included home, services, team page, testimonials, and a contact page. Keeling & Associates had a slightly busier menu bar with a lot of information which made it look cluttered. S4HE education had great organization as it didn’t have much content, but the content it had was easy to navigate through and find. S4HE’s menu bar can be seen in figure 5.3.

### Style

Overall, S4HE’s competitors had consistent and aesthetically pleasing style and formatting. Huron had the neatest website, meanwhile Keeling and Associates had small
consistency issues with their team member profiles. In addition, Kennedy and Company had some white space issues where information seemed crowded. S4HE mainly suffered from inconsistent formatting and poor use of whitespace which is very important to design.

Images should help the message, not distract or hurt it. An example of odd images was shown when Keeling and Associates used the same image twice on different pages but with a strange quality and cropping on one. Moreover, it’s likely the user will see both pages as they click through the services provided.

**Strategy**

Strategy defines a way forward—a pathway toward goals. Although the meaning of the word “strategy” embraces a plan, not all strategy is formal strategic planning; thinking and working strategically do not require the usual constructs and rhetoric of a strategic plan. K&A partners with whole institutions, divisions, departments, and higher education professional organizations to foster and support various forms of strategic planning, but also strategic thinking and acting. Strategy may mean:

![Image of person giving a presentation](image1)

**Assessment of Learning**

Even if you’re new to higher education, chances are you’ve heard about this thing called “Assessment.” If you were to attend any one of the many annual professional conferences in higher education, line the attendees up, and ask whether they believe in assessment—in particular, assessment of learning—responses would be pretty varied, but often skewed toward the negative. Some of this is due to over-saturation of the idea or impatience and frustration with a lengthy process that requires time, focus, and, occasionally, a little problem-solving to produce data with the decision utility to inform improvements in learning experiences and demonstrate accountability. Sometimes, we have a distaste for assessment because it might tell us uncomfortable truths about our pedagogy and practice. And all of this comes when we often have not been provided the tools, resources, and training to “do assessment,” and do it well.

![Image of person giving a presentation](image2)

Figure 5.4: Reuse of an image on Keeling & Associates Website Ver 1

Figure 5.5: Reuse of an image on Keeling & Associates Website Ver 2

In addition, on another page, their image went out of bounds and blocked some text.
It is important to use images to attract attention; however, when images are misused they can make the website stand out in a bad way and can look unprofessional. Images should be high quality but not so sharp that they stand out as looking false.

In S4HE’s case, certain pictures looked out of place or stood out as stock images. For example, the homepage shown in Figure 5.3 shows an image at the bottom. When the user scrolls down, it is just the rest of the image. However, the option to scroll down implies that there would be more content. Therefore, in the redesign S4HE should experiment with the placement of images on the homepage. In addition, there are a few images on the homepage other than the one currently shown in Figure 5.3. These images cycle through and they vary in quality and relevance to the words on the homepage. There should be only one image, or if multiple images are used they should have a similar aesthetic and quality.

With regards to color scheme, all the websites had a professional color scheme. They typically used white, grays, and black with a key color. For example, Huron Group and Kennedy and Company’s were blue. Keeling & Associates’ color was red. S4HE’s color is yellow. Most websites used white as the main backdrop with black text. This provides a pleasant contrast between the text and background which makes the website easier to read. S4HE’s background is a medium to darker grey. The contrast for S4HE’s website should be improved in order to make the website more readable. Therefore, the background could be lightened or changed to white.
Content

All of the websites had a organized and useful content. Keeling and Associates had a lot of content that was scattered around the website. S4HE’s content was useful but could have benefited from some white space and formatting to make it more readable. Keeling and Company’s content was very neat and organized. For example, many of their pages had sections that were consistent across similar pages such as services or team member pages. S4HE would benefit from a focus on creating better readability and more organized content. Creating new content could help S4HE showcase their experience which is said to be their primary advantage by S4HE partners and associates.

Social Platform Utilization

All of S4HE’s competitors used social media. Huron, the biggest company, had the highest followership and engagement across all sites(Facebook, Linkedin, and Twitter). Kennedy and company utilized all sites but had lower engagement. Keeling and associates utilized only twitter and had very low engagement but a comparable followership to Kennedy and Company’s followers across all three sites combined. Huron posts almost more than daily on all its sites. Kennedy and Company posts regularly but not daily and Keeling and Associates posts very irregularly going through periods of high frequency posting. Linkedin was a source of highest followership for Huron and Kennedy and Company. Twitter was used by all three competitors but had the lowest engagement by far in terms of likes and retweets which were in the single digits usually just one or two. Huron’s advantage is that it consults so many disciplines, that there is a lot of content potential. It seems that the best social media to use if any would be Linkedin because of the high engagement and professional audience. People who use Linkedin have the option to stay tuned in to certain tags they are interested in. Therefore, if S4HE used Linkedin they could use tags such as higher education to reach the appropriate audiences who are interested in that industry.

Search Optimization

When testing various terms to see if a company showed up, it was found that Huron Group had the best outcomes. This made sense because Huron Group is a large company. S4HE’s other competitors showed up occasionally but many times it was as an ad if they appeared at all. In addition, when a search was refreshed a while later sometimes the results changed. Ultimately, S4HE never showed up under any searches made. Even when ”Success for Higher Education” was googled, nothing about S4HE turned up. Meanwhile, when other competitor names were searched, their website came up as the first result and the rest of the results were information about them. There are tools one can use to analyze their website’s appearance under search terms; therefore it is possible that S4HE shows
up under some terms, that just haven’t been found and knowing this information could be useful for marketing purposes. It seems that besides Huron, the other two competitors might now have shown at all if they hadn’t take out ads.

This suggests that Ads could have potential for S4HE, however, without information on the success of taking advertisements out, it is unsure how successful the advertisements are for the competitors. In addition, search engine optimization is a process used to increase website traffic by increasing the visibility of a website to users of a search engine. There are many resources that show steps that can be taken to make a website more likely to show up under search terms. Search engines such as Google explain part of how their algorithm works and how results can be improved but no one really knows exactly how the algorithm works.

Figure 5.4 shows the results for search terms. Other terms were used such as College Consulting Firm, College Consulting, University Consulting, Accreditation Consulting, Institution Consulting Services, and Secondary School Consulting Firm but these searches showed no results including the competitors.

Next to the search terms, a 1 was placed under a company when it appeared on the first page. A two was placed if the company appeared on the second page, and if the company was in the first five results “first five” was written. It is also denoted whether the company appeared as an ad. This was important to show because according to a 2012 study by Advanced Web Rankings 67% of clicks go to the top five listings of a search result. 95% goes to the first page overall. (Jacobson, 2017)

![Search Optimization Analysis Results](image)

- **Figure 5.7: Search Optimization Analysis Results**

### 5.2 Survey

This section covers the survey responses and their impact on the business strategy. Full responses can be found in Appendix C.1.
What is your vision for S4HE?

The primary purpose of this marketing strategy is to gain clients. Increasing the strength of S4HE’s web presence would help draw in clients. In addition, S4HE partners and associates want to be seen as reliable in their industry.

This should be the focus of the business strategy moving forward.

Who is your ideal client?

The responses to this question show the importance of establishing a relationship with clients and finding the right people to work with. The ultimate goal of marketing is to attract clients and create a brand image.

What is your primary competitive advantage?

Seeing as all respondents mentioned their experiences as their advantage or part of their advantage; it could be a good idea to focus on showcasing the experience of the partners and associates. The page for each of these people should definitely be revamped, and other pages should find a way to point back to those pages or mention the team members.

If S4HE decides to pursue social media use, those could further serve as outlets for showcasing the partners and associates and establishing relationships with clients.

What are your expectations for a marketing strategy?

Respondents wanted a simple, up to date, and new plan. Therefore a goal of the report is to make sure that it is simple but effective and can be implemented by the S4HE partners and associates.

One respondent to this question wanted to establish professional social media messaging, including stories from clients.

What feedback have you received on the current website?

The biggest takeaway from these responses is that the website needs to be updated and that not much changes over time. The website will definitely need a large overhaul in terms of design and some content.

What networks might S4HE use to market your skills?

Most of the respondents talked about professional organizations as opposed to social media. Therefore, reaching out to professional organizations would be highly suggestible as part of a marketing plan. This seems to be an agreeable point to all partners and associates.
5.3 Business Strategy

The following section outlines the final business strategy, based on Dave Lavinsky’s Forbes article which provides a template for strategic plans and was summarized in section 2.3 (Lavinsky, 2012). The following information is the main deliverable of this report.

Executive Summary

Success for Higher Education (S4HE) is a higher education consulting firm where academic leaders work with higher education institutions. S4HE’s partners and associates bring strong experiences as their main advantage. However, as a small company they don’t have as many resources as their competitors and are lacking in web presence. Currently their web presence is stagnant and needs an update. The website needs a large redesign and update. In addition, it could be promising for S4HE to implement social media and content creation. Executing this plan would allow for S4HE to capture analytics that will help inform future decisions. These numbers will show the success of their efforts. S4HE is looking for academic leaders. The higher education consulting industry appears to be growing but there is definitely strong competition. This marketing plan should help S4HE stand out and establish themselves. The S4HE team will have to coordinate their efforts because a good amount of resources will have to go into this plan in the beginning and once all the steps are set up, it will be a matter of creating consistent content. S4HE has various options when it comes to the implementation of these steps. They can be implemented at a very low cost but with time and effort, or they can be outsourced. Using this strategy can help S4HE become more visible to potential clients and create a name as a trusted higher education consulting firm.

Elevator Pitch

S4HE is a higher education consulting firm. S4HE partners and associates work with higher education institutions to identify problems and design solutions. S4HE utilizes problem solving, analytical thinking, writing, communication, planning and organization. In addition to consulting, S4HE provides the unique service that is their Values-Based Academic Leadership (VBAL) Institutes. The S4HE team boasts an abundance of valuable experience in academia across disciplines and positions.

Company Mission Statement

The founding partners are values driven academic leaders committed to institutions’ success. Together with their team of associates, S4HE bring years of experience as faculty members, deans, directors, and provosts, as well as, leaders in government, STEM,
and private industry. Their goal is to help institutions create the environment that maximizes the skills of your community and allows institutions and their community to achieve success. S4HE champions best practices in ethical and inclusive decision-making and celebrate the combined successes of the those higher education serves. They help institutions envision and implement the changes needed to reach their goals.

**Strengths, Weaknesses, Opportunities, and Threats Analysis**

S4HE’s strength according to partners and associates is their experience. Everyone on the team has achieved much within their academic careers and can contribute to the success of an institution and its leaders. Another strength, is their institute which is a unique service that could be marketed more. A weakness for s4HE would be that it is a smaller company and therefore has less resources than the competition. S4HE performed poorly against it’s competitors with regards to web presence. Therefore, S4HE will have to be selective about how much they are willing and able to put into their marketing campaign. There are opportunities in social media and professional organizations. Creating a network with other academic leaders could go a long way towards establishing a clientele.

Threats to this plan would be inaction. Currently, there is not much that changes or gets updated with regards to S4HE’s web presence. S4HE partners and associates would have to work together to make sure the changes are made and that content is being made and put out. The website should serve as a host for information, but combine itself with social media to draw people to the website and increase web presence. This will take effort and coordination that is not currently being used towards online marketing.

**List of Goals**

The first goal would be to redesign and organize the website. Many aspects of the site should be updated.

The second goal would be to establish a social media presence. The recommended platform if any would be LinkedIn, because it has a higher level of followership and engagement for the competitors and attracts professional users who are perhaps already looking for related content.

The third goal would be to create a blog on the website. Blog posts would be occasional and could talk about client success stories, issues in the industry, or highlight the team accomplishments. Having a blog would provide a neat specified area for content and could help web visitors get to know S4HE. Companies like Huron use blogs to establish themselves as thought leaders in the industry. The social media account can link to the blog post whenever a new one is made and this would direct traffic back to the website. If a blog is pursued, content would have to be consistent if not frequent.
Key Performance Indicators

Key performance indicators for this strategy would be web traffic numbers. There are various web analytic tools that can be used to find information on who is visiting the website and from where. In addition, social media provides statistics such as followers and likes. Therefore, S4HE would be able to see its engagement on those websites as well. In addition, S4HE will be able to see what search terms it shows up under.

Summary of Target Customers

S4HE’s target customers are academic leaders who are looking for solutions to the issues their institutions face. Therefore, S4HE should look to professional organizations where these minds are already gathering to consume information about their industry. In addition, the survey results showed that some partners and associates preferred long term clients that they could get to know and better assist throughout the relationship.

Industry Analysis

The higher education consulting industry seems to have a lot of competition. However, institutions continue to face new challenges as the times change. S4HE can create a place for themselves in the industry by boasting their unique experiences and showcasing the work they have already done. One of the bigger hurdles S4HE will need to overcome is creating a name and reputation when it is relatively unknown compared to its competitors.

Higher education consultants work with institutions to solve challenges. Ultimately, the institution aims to provide value for their students and create an optimal learning environment.

Competitive Analysis and Advantage

Out of all of the firms analyzed in this report, all of the firms offer general strategic planning and seem to focus on the administration of institutions. Both Huron Group and Kennedy and Company offer financial and technology-based consulting. Keeling and Associates was the only firm to explicitly offer hiring services. Success for Higher Education was the firm that focused the most on faculty training, and individual development.

All of these firms covered a broad range of services with a lot of overlapping sections. Compared to the other firms, Success for Higher Education seemed like the firm most likely to cater to groups within an institution ranging in scope. They could work with individuals, departments, administration, boards, etc. The other firms seemed like they were targeting the institution as a whole and this means they would mostly be working with the highest levels of administration. Their services also focused more on budgets, programs, and general strategy as opposed to working with faculty.
Team

In order to revamp the website, S4HE will need to outsource this or delegate this task to someone already on the team. Should they choose to take this on themselves, there are a plethora of options for beautifully designed websites that can be customized for all needs. Therefore, someone with an eye for design and some level of technical skill should take care of this if S4HE chooses to redo the website on their own.

If S4HE chooses to pursue social media, team members will need to create content consistently. The team should work together to create content and divide the work based on availability; however, a sole team member should be in charge of making sure there is a consistent posting schedule and then post the content to the blog and link to the blog in social media posts. Social media management of course can be outsourced as there is an industry for social media marketers, but S4HE has the option of executing this themselves.

Operations Plan

Once team members know which tasks are best suited to the team member, the first step should be to revamp the website. The homepage and other pages of the website need to have a call to action. This call can be to contact S4HE or to check out other pages of the website. It should be clear and the design of the website should encourage users to take the action.

The homepage is very important as it is the first page many visitors see and sometimes the only page. The picture on the page should be reformatted and one of the pictures with books looks out of place and like an obvious stock photo.

The services pages are fine with regards to format. There is a missing link on the main services page. The style for all partners and associates pages should be the same. The information could also be organized in a different way. I would suggest an approach similar to any of the competitors where information is split into sections such as education, experience, and/or fun facts. All the images of the partners and associates should be of a high quality and on a comparative level. The institute pages should be formatted similarly and have organized and targeted information. If all of these pages show agendas, they should be formatted the same.

Overall, the website could use more thoughtful use of white space and consistent formatting. In addition, the color scheme is unique and could be used more effectively. However, the gray is used too much and the website would look more vibrant and readable if the gray was used more sparingly.

The following figures show a prototype of a redesign for S4HE’s homepage with more vibrant colors, a call to action, and summarized information. There is plenty of white-space but not too much. This homepage was quickly generated using Wix, a web design
website that offers many templates and customizable features. If S4HE chooses to revamp the website themselves, this is a good recommendation but there are other popular website builders such as Squarespace or Network Solutions. Wix, for example, is free and comes with many free options but removes wix logoing and gives you a domain once you’ve upgraded to premium.

Figure 5.8: S4HE Homepage Prototype

Get on the path to success
Strategize. Organize. Realize.

Figure 5.9: S4HE Homepage Prototype Scrolled Down

If a blog is added, it should have it’s own section on the menu bar and can be simply named blog or something like insights or resources, as certain competitors have used.
These blog posts can have images but they should all be high quality and relevant. Figure 5.7 shows an example menu bar organization that would have all of the elements in S4HE’s current menu bar with some differences. To make room for the blog, the contact page was removed and contact info was placed in the top right corner since there was only an e-mail. If S4HE had more contact information such as addresses and/or phone numbers, it would make more sense to have a separate contact page. In addition a few pages were made to sub pages. For example, services and related pages were placed together as were pages related to S4HE, its partners, and its mission. When a user hovers their mouse over a major menu page, a drop down menu will appear to show the sub pages. This menu bar was shown in Figure 5.8 and is created in a similar format to S4HE’s competitors. In addition, the institutions could have their own category on the menu bar instead of being under ”what we do”. However, with the style used to create the homepage prototype, putting too many main pages on the menu bar was less aesthetically pleasing.

When the website is set, then it would make sense to branch out to social media. Linkedin draws a more professional crowd than other sites and therefore, it would be good for S4HE to establish themselves as a professional entity. Since, people are already on Linkedin, S4HE can link their blog articles on the social media page so as to drive traffic back to the website. Many companies create simple posts around holidays to connect to their followers. In addition, posts can utilize tags in order to tailor the audience to professionals who are interested in higher education, faculty development, academia, etc. Moreover, in the future as S4HE grows, their Linkedin page could attract potential new
partners and associates. As academic leaders notice content they like, they can share it on their own pages and more professionals in their circle might take notice of S4HE. Below is an example of a LinkedIn post by Kennedy and Company which shows them reacting to an article from the Wall Street Journal on higher education challenges.

![LinkedIn Post Example](image)

Figure 5.11: Sample LinkedIn Post

Similarly, S4HE will be able to react to industry news and establish authority as experts. Through online marketing, information can spread quickly. Though it is not really possible to control web traffic, S4HE can promote their content by creating interesting posts that professionals would find worth sharing with their circle.

In addition, another useful tool for online marketing is the infographic. These are informational graphics which can be used to convey information simply and in an attention grabbing way. An example of an infographic is shown below in Figure 5.12. The infographic was created using infogram.com which provides many free templates but can be upgraded to unlock more features. Depending on the users skill level there are many options for creating infographics such as Adobe Illustration or Microsoft Publisher. These can be posted across social media and on blogs in order to attract attention to services, events, or the company itself. In this case, this simple infographic focuses on S4HE's VBAL Institutes. Infographics often include statistics in visual forms.
Financial Projections

The cost of this marketing strategy will vary highly on S4HE’s decisions. They have the option to outsource their marketing plan with the choices of hiring content writers, website designers, social media managers, and so on. On the other hand, they can decide to recreate the website themselves, cut out time to post content and develop a schedule and commit to updating the site. Ultimately, it is a question of whether to dedicate time or money to this issue and both are valuable.

In addition, the goal of the marketing strategy is to attract clients and create a strong web presence for S4HE. The steps outlined in this document will create a strong web presence for S4HE that is comparable to its competitors. However, whether that will be enough to bring clients will have to be seen. A highlight of a business strategy is that
it is flexible. No matter what route S4HE decides to take, they will have more numbers to work with in terms of website visits, social media interaction, and followers. Using this information, S4HE will be able to assess by the end of the year whether the time dedicated to their web presence is paying off. Then S4HE can discern whether to keep their efforts steady, ramp up their efforts, or hold back. At the very least, these efforts will help S4HE show up when people search S4HE and that will open the door to S4HE establishing itself.

5.4 Summary of Conclusions and Recommendations

In conclusion, this report created a business marketing strategy for S4HE that was designed to boost their web presence. These steps include a redesign of the current website, the implementation of a blog, and the use of social media sites such as Linkedin. Using research, comparative analysis, and a survey, the goal of this report was met. As a business strategy is a live document, this document can serve as a foundation for future marketing endeavours. This report recommends that S4HE use the steps outlined to create a marketing presence and use their newfound statistics to guide future decisions.
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Appendix A: Introduction

A.1 Brochure for Roosevelt University Institute

We invite you to join us for our annual Values-Based Academic Leadership Institute. Together we explore critical issues in academic leadership by developing the foundations that drive values-based leaders. Our goal is to help you create an environment that maximizes the skills of your community and fosters your success.

Program Dates:
October 18 and 19, 2019

Price: $600
Local scholarships are available for institutions with three or more registrations.
e-mail: info@s4he.com

Registration includes:
• Admission to all educational sessions
• All related session materials and inventories
• Lunch and networking reception on Friday, October 18th
• Breakfast and lunch on Saturday, October 19th

Location Host:
Roosevelt University, Chicago

Contact persons:
Karen Oates - kocales@s4he.com
Amy Shachter - ashachter@s4he.com
Professional leaders from all aspects of the academic community are encouraged to develop their deeper understanding of Values-Based Leadership.

Presented By:
S4HE
Success 4 Higher Education

In Partnership With:
Roosevelt University

Values-Based Academic Leadership Institute
October 18 and 19, 2019
A Success 4 Higher Education Leadership Institute

Hosted by
Roosevelt University
Chicago, IL

Register Today!
www.s4he.com

Guided By Values: Inspiring Your Success
About the Institute

Institute participants explore the practices of value-driven leaders, focusing on leadership that produces community transformation by creating an environment of honesty, trust, and trust. Whereas other academic leadership development programs in higher education focus primarily on building management skills and assume the purpose of career advancement, the Values-Based Academic Leadership Institute does much more. We take a holistic approach to all levels of academic leadership by grounding theory, practice, and institutional mission in personal and professional values to foster authentic, successful leadership.

Institute Schedule

Morning Session Workshop 1: Values-Based Academic Leader (VBAL)
In our opening session, we explore, What does it mean to be a VBAL? what are the characteristics and motivations of a VBAL? how does a VBAL differ from other leadership styles in the academy? and what is a grounded, authentically VBAL? Each participant completes a values inventory as a reference for subsequent decision making and career exploration.

Afternoon Session Workshop 2: Leading Change and Managing Rough Waters
We begin exploring strategies for VBAL to lead change with integrity and be prepared for hard decisions and conversations with others. Approaches based on transparency and collaboration will be discussed.

Morning Session Workshop 3: Effective Strategies & Tools
In this session, we continue exploring both an understanding of and strategy for dealing with difficult individuals and challenging situations. We provide participants a series of case studies for group discussion.

Afternoon Session Workshop 4: Next Steps for You as a Values-Based Academic Leader
We will discuss strategies to build your leadership team, motivate your faculty, develop talent, and work with external communities. We explore how best you can leverage resources, both financial and human including advisory boards and other external leaders. We return to our values inventory as we prepare for our next leadership challenge. Participants are invited to reconnect with the workshop facilitators’ institution over the next 6 months.

Who We Are

Success 4 Higher Education (S4HE) offers consulting expertise in a wide range of academic areas. We provide you and your institution with a personalized approach to solving your professional development needs, from customized workshops to strategic planning, leadership development, and coaching. To see a detailed description of our services, visit www.s4he.com.

Guided By Values: Inspiring Your Success

National Institute for Science & Civic Engagement (NISCE) is partnering with S4HE to present this Institute. NISCE is a national organization of over 2000 faculty and administrators who have created and lead a global Community of Transformation for engaged teaching and learning.

The NISCE’s programs provide leadership opportunities for individuals and professional development support for academic institutions.

To learn more, visit www.nisce.net.
A.2 Brochure for Broward College Institute

The Details
We invite you to join us for the Values-Based Academic Leadership Institute.
Program Dates: October 5-6, 2018
Price: $600.00
Included:
- Admission to all educational sessions
- All related session materials
- Lunch and networking reception on Friday, October 5
- Breakfast and lunch on Saturday, October 6
Location:
Broward College, South Campus
Pembroke Pines, FL
Contact Person:
Kyle Simmons
Email: Kyle.simmons@ncsce.net
Phone: (502) 513-4000

Register Today!
To learn more and to reserve your spot visit: www.s4he.com

Presented by:
S4HE
Success 4 Higher Education

In partnership with:
NATIONAL CENTER FOR SURVEY & ENGAGEMENT

VALUES-BASED ACADEMIC LEADERSHIP INSTITUTE
OCTOBER 5-6, 2018
BROWARD COLLEGE, SOUTH CAMPUS
PENMBROKE PINES, FL

Register Today!
To learn more and to reserve your spot visit: www.s4he.com

INTEGRITY
Judgment
COMPETENCE
VISION
PERSISTENCE
HUMILITY
About the Institute

Institute participants will explore the practices of a values-driven leader, one who can produce transformative change by creating an environment of honesty, truth, and trust. Whereas other academic leadership development programs in higher education focus primarily on building management skills and secure the purpose of career advancement, the Values-Based Academic Leadership Institute does much more. We take a holistic approach to all levels of academic leadership by grounding theory, practice, and institutional mission in personal and professional values to foster authentic, successful leadership.

Institute Schedule

Day 1: October 5, 2018

Morning Session Workshops: The Values-Based Academic Leader (VBAL)

In our opening session, we explore a series of questions, including the following: What does it mean to be a Values-Based Academic Leader (VBAL)? How do we sustain the success and institutions of a VBAL? How does the style of a VBAL differ from other leadership styles in the academy? As a VBAL, how do you respond to those who choose to be unproductive in the community, and what are some of the strategies you can use to work with difficult individuals and resolve conflict?

Afternoon Session Workshops: Knowing Your Leadership Characteristics and Values

Starting with creating your values inventory, we explore the elements of a successful and fulfilling career. We focus on the balance between doing and accomplishing your academic goal without sacrificing personal wellbeing and what makes you feel fulfilled. We explore keeping your career on track with the help of ongoing feedback from the system and you. In this session, we begin to develop the elements of your Career Development Plan.

Day 2: October 6, 2018

Morning Session Workshops: Effective Strategies & Tools

Human communication, connecting to the needs of one’s constituents, and understanding what motivates people are key enabling elements exposed by a VBAL. We utilize case studies on contemporary topics to exemplify transparency, negotiation skills, and working with community partners. As a leader, you will explore how to better leverage resources, both financial and human, that are available to you.

Afternoon Session Workshops: Next Steps for You as a Values-Based Academic Leader

The first 100 days in a new position are critical for setting the stage for your accomplishments. We will explore techniques for articulating values in your new role and working with university partners, alumni, and friends. We conclude this Institute by coaching you on your Career Development Plan and your Three-Minute Elevator Pitch.

Who We Are

Success 4 Higher Education

S4HE offers consulting expertise in a wide range of academic areas. We provide you and your institution with a personalized approach to solving your professional development needs. From customized workshops to strategic planning, leadership development, and coaching, To see a detailed description of our services, visit www.s4he.com.

National Center for Science & Civic Engagement (NCSC)

NCSC is partnering with S4HE to present the Institute. NCSC is a national organization of over 2000 faculty and administrators who have created and lead a global Community of Transformation for engaged teaching and learning. The NCSC’s programs provide leadership opportunities for individuals and professional development support for academic institutions. To learn more, visit www.ncscs.net.
A.3 VBAL Institute Agenda Roosevelt University

Values-Based Academic Leadership Institute Full Program
Friday, October 18, 2019

8:30 am - 9:00 am  Registration

9:00 am - 9:15 am  Welcome and Plans for Our Time Together
What Is Values-Based Academic Leadership?
Karen Oates and Amy Shachter, SAHE

9:15 am - 10:00 am  Values Inventory
Amy Shachter, SAHE

10:00 am - 10:45 am  Personal Passion and Fulfillment
Karen Oates, SAHE

10:45 am - 12:00 pm  Managing vs Leading: Finding the Right Balance
Activity: Case Study
Amy Shachter, SAHE
Robert Seiser, Roosevelt University

12:00 pm - 1:00 pm  Lunch

1:00 pm - 2:30 pm  Leading Change with Trust and Transparency
Activities: Car-Driver and Case Study
Karen Oates, SAHE
Robert Seiser, Roosevelt University

2:30 pm - 3:15 pm  Strategies for Motivating and Mentoring Your Faculty
Karen Oates, SAHE

3:15 pm - 3:45 pm  National Trends and Demographics related to Faculty
Amy Shachter, SAHE

3:45 pm - 4:00 pm  Break

4:00 pm - 4:30 pm  Changing Faculty Roles and Student Expectations
Karen Oates, SAHE

4:30 pm - 5:30 pm  Institutional Commitments to Faculty
Activity: Divergent and Convergent Thinking
Amy Shachter, SAHE

6:00 pm  Reception
Values-Based Academic Leadership Institute Full Program
Saturday, October 19, 2019

9:00 am - 9:15 am  Grit to get Started: Video GRIT

9:15 am - 11:30 am  Preparing for Difficult Conversations
                      Strategies for Dealing with Difficult People
                      Activity: Case Study
                      Amy Shachter, S4HE
                      Robert Seiser, Roosevelt University

11:30 am - 12:30 pm  Lunch

12:30 pm - 1:30 pm  Models for Creating an Inclusive Culture to Recruit and Retain Diverse Faculty
                      Activity: Case Study
                      Amy Shachter, S4HE

1:30 pm - 2:15 pm  Partnerships, Alumni, Advisory boards and fund-raising
                      Karen Oates, S4HE

2:15 pm - 3:00 pm  Thriving as a Leader: Grounded and Work Life Balance
                      Karen Oates, S4HE

3:00 pm - 4:00 pm  Next Steps in Work and Career
                      Karen Oates and Amy Shachter, S4HE

4:00 pm  Closing remarks and invitation to connect

    The leader determines the environment …
    The environment determines the behavior …
    The behavior determines the culture.
    by an unknown leader

You have this important time to determine the environment.

For more information and to register: www.s4he.com.
A.4 VBAL Institute Agenda Broward College

Values-Based Academic Leadership Institute Program

Friday, October 5, 2018
All sessions except the reception will take place at Broward College South Campus Building 65 rooms 116 and 156.
The evening reception will take place at The Tryp by Wyndham Maritime Hotel Coral Reef Ballroom.

8:00 am - 8:15 am  Welcome and Plans for Our Time Together
What is Value-Based Academic Leadership?
Karen Dutes and Amy Shachter, S4HE

8:15 am - 8:45 am  Introductions: Building a Community of Values-Based Academic Leaders
Amy Shachter, S4HE

8:45 am - 10:15 am  Getting Started: Accomplishments, Goals, and Challenges
This short, interactive session will frame the institute for each participant considering such questions as 1) How is my institution a better place because I am there? 2) What three goals would I like to accomplish as an academic leader in the next 3-5 years? and 3) What are the challenges you face in accomplishing these goals (assuming that money and staffing are limited)? Karen Dutes and Amy Shachter, S4HE

10:15 am - 10:30 am  Break

10:30 am - 11:30 am  The Challenges and Opportunities Facing Academic Leaders
Philip Rogers, Senior Vice President, American Council on Education

11:30 am - 12:30 pm  Foundations of Leadership to Address Challenges and Opportunities
Theo Koupelis, Dean, Academic Affairs (South Campus), Broward College

12:30 pm - 1:30 pm  Working Lunch – Managing vs Leading: Finding the Right Balance
Kris Godley, Dean, Wilkes Honors College, Florida Atlantic University

1:30 pm - 2:30 pm  VBAL Foundations: Values Inventory
Amy Shachter, S4HE

2:30 pm - 3:00 pm  VBAL Foundations: Personal Passion and Fulfillment
Karen Dutes, S4HE

3:00 pm - 3:15 pm  Break

3:15 pm - 4:00 pm  Leading Change as a VBAL
Karen Dutes and Amy Shachter, S4HE
4:00 pm - 4:30 pm  | **SMART+Y Goals** (specific, measurable, attainable, relevant, time-based, and values-based goals)
Karen Oates, SAHE

4:30 pm - 5:30 pm  | **Group Discussions: Getting Started as VBAL and Next Steps as VBAL**

6:00 pm  | **Reception at Hotel**

**Saturday, October 6, 2018**
*All sessions will take place at Broward College South Campus Building 66 rooms 119 & 119*

8:00 am - 8:15 am  | **Grit to get Started: Video** [GRIT](#)

8:15 am - 9:15 am  | **VBAL Toolkit: Strategies for Dealing with Difficult People**
Case study discussion
Presenter: Amy Shachter, SAHE
Facilitators: Hokulani Alka, University of Utah, and Reid Bishop, Belhaven University

9:15 am - 10:00 am  | **VBAL Toolkit: Strategies for Motivating and Mentoring Your Faculty**
Karen Oates, SAHE

10:00 am - 10:15 am  | **Break**

10:15 am - 11:15 am  | **VBAL Toolkit: Strategies for Building Trust through Transparency and Communication**
Presenter: Amy Shachter, SAHE
Facilitators: Theo Koupelis, Dean, Academic Affairs (South Campus), Broward College, and Kyle Simmons, National Center for Science and Civic Engagement

11:30 am - 12:45 pm  | **Working lunch: VBAL Toolkit: Value-based Fundraising, Advisory Boards, and Alumni Engagement**
Karen Oates, SAHE, Maryane Goebel, Board Member

12:45 pm - 2:00 pm  | **The First 100 days as a VBAL**
The first 100 days in a new position or with new responsibilities are critical for setting the stage for your accomplishments. The discussion will focus on a number of important steps needed to provide a foundation for success including listening, understanding expectations, being authentic, building a coalition, and building your leadership team.
Amy Shachter, SAHE

2:00 pm - 2:45 pm  | **VBAL Toolkit: Grounded and Work Life Balance**
Karen Oates, SAHE

2:45 pm - 3:00 pm  | **Break**

3:00 pm - 4:00 pm  | **Next Steps: What will next 100 days look like for you?**

4:00 pm  | Closing remarks and invitation to connect

The leader determines the environment...
The environment determines the behavior...
The behavior determines the culture.
You have this important time to determine the environment.
Appendix B: Methods

B.1 Survey E-Mail and Questions

Dear ____,

My name is Alexandra Meraz and I am completing a research project with Success for Higher Education as my sponsor. The project is meant to fulfill my interactive qualifying project requirement for my degree at Worcester Polytechnic Institute. I am working with Karen Gates as my advisor. The goal of the project is to create a marketing plan for S4HE.

In order to create a strategic marketing plan, I would like your input as an S4HE partner on a few questions in the survey below. Your answers will help me understand S4HE marketing goals.

Your answers will be anonymous; however, they may be quoted in my report. The information you provide will be used to gather insight into S4HE’s goals and advantages in order to guide the business strategy. Each question is optional and you may choose to answer or not. Your answers will help me understand S4HE marketing goals and advantages which will provide a direction for marketing strategy. This research has been reviewed according to Worcester Polytechnic Institute IRB procedures for research involving human subjects.

Your time on this short survey would be greatly appreciated.

If you have any questions about the process, please do not hesitate to reach out to me as I highly value your response.

Survey:
http://wpi.quatrnic.com/jfe/form/SV_1M1Dxk94zExAFal
Thank you for your time,
Alexandra Meraz
Student at Worcester Polytechnic Institute

Questions:

1. What is your vision for your work with S4HE?
2. Who is your ideal client?
3. What is your primary competitive advantage?
4. What are your expectations for a marketing strategy?
5. What feedback have you received on the current website?
6. What networks might S4HE use to market your skills?
B.2 IRB Exception

Worcester Polytechnic Institute
100 Institute Road, Worcester MA 01609 USA

Institutional Review Board
FWA #00015024 - HHS #00007374

Notification of IRB Approval

Date: 27-Nov-2019
PI: Oates, Karen K
Protocol Number: IRB-20-0078
Protocol Title: A Small Business Expansion and Sustainability Plan
Approved Study Personnel: Meraz, Alexandra
Effective Date: 27-Nov-2019
Exemption Category: 2
Sponsor*:

The WPI Institutional Review Board (IRB) has reviewed the materials submitted with regard to the above-mentioned protocol. We have determined that this research is exempt from further IRB review under 45 CFR § 46.104 (d). For a detailed description of the categories of exempt research, please refer to the [IRB website](#).

The study is approved indefinitely unless terminated sooner (in writing) by yourself or the WPI IRB. Amendments or changes to the research that might alter this specific approval must be submitted to the WPI IRB for review and may require a full IRB application in order for the research to continue. You are also required to report any adverse events with regard to your study subjects or their data.

Changes to the research which might affect its exempt status must be submitted to the WPI IRB for review and approval before such changes are put into practice. A full IRB application may be required in order for the research to continue.

Please contact the IRB at [irb@wpi.edu](mailto:irb@wpi.edu) if you have any questions.

*If blank, the IRB has not reviewed any funding proposal for this protocol
Appendix C: Results

C.1 Survey Results

Q1 - What is your vision for S4HE?

What is your vision for S4HE?

- Experienced consulting for values-based leadership in the Academy.
- to be the most reliable, well skilled and called upon consulting firm for a set number of client.
- Stable set of clients (5-10) each year
- My vision is to help develop S4HE so that it is recognized as a reliable, evidence-based source for help with leadership and campus issues related to the improvement of undergraduate STEM education.
- to be an active consulting firm for institutions and faculty/administrators trying to improve management, leadership and learning.
Q2 - Who is your ideal client?

Who is your ideal client?

Admin, faculty and staff of liberal arts colleges -- may be helpful for university honors colleges.

An institute which calls us back on a yearly basis and can afford to pay us premium consulting fees.

Client with a clear goal and specific outcomes. Willing to work collaboratively to plan and execute project. Longer term relationship - more than one contact.

Academic leaders and institutions that recognize that they face leadership or structural challenges within their institution and are trying to seek outside guidance to help them address those challenges.

I prefer about 10 clients who use our services each year so we get to know the institution well and can help them on a consistent basis. I have no ideal client.

Q3 - What is your primary competitive advantage?

What is your primary competitive advantage?

20 years as faculty member, biologist, and now senior administrator. Working across disciplines and divisions, and working closely now across all sectors of the institution: student affairs, athletics, marketing, finance office, development, and admissions. Teamwork and collaboration.

We have experience like no other!

Our years of experience. Our complementary experiences and approaches.

If S4HE can make the business model work (i.e., financially), having partners and associates with a broad array of expertise and experience, so that different people from the organization can work with different clients, would be the primary advantage. Many other consulting groups are narrowly focused.

Follow-up is critical for our BRAND. We are academics who have had all different types of positions in and out of the academy.
Q4 - What are your expectations for a marketing strategy?

What are your expectations for a marketing strategy?

Highly professional social media messaging, including stories from clients.

Simple, clear and impactful

Brings new business.

I agreed to sign on as an associate with no expectations about how much I’ll be called on to work with clients. So, I don’t have any specific expectations. I’ve advised the partners to think outside the box, beyond the usual suspects. For example, I’ve suggested that they reach out to disciplinary and professional societies that are looking to help their staff and/or their membership deal with leadership and infrastructural issues.

up to date, refreshed and to the point

Q5 - What feedback have you received on the current website?

What feedback have you received on the current website?

You need to update the information about David Ferguson — I recommend a memorial note be posted as soon as possible! Also, I recommend some close editing by a professional (i.e., for grammar and context). The weakest page is https://www.s47he.com/the-team. The pictures of the consultants should all look professional. Amy’s is pixilated. And having to click on a picture for someone’s expertise may underscore implicit bias. I happened to be on this site earlier, and I recommend the way they introduce their consultants: https://www.kabdo.com/lexington

Modest site with little changing over time.

Just looks good but needs more focus. What do we do?

None.

It is not up to date
Q6 - What networks might S4HE use to market your skills?

What networks might S4HE use to market your skills?

Associated Colleges of the South (ACS) and similar consortia in other regions, AAC&U, SENCER, and PULSE.

Professional organizations

SENCER, Jesuit schools, engineering education

Networks of professional societies. I don't know enough about social networks to be able to comment specifically, but I'm guessing that there are opportunities there.

SENCER Campus compact AITU ASEE