Communications and Marketing

Building a Communications and Marketing Strategy in a
State or Institution for Incremental Credentialing

www.credentialasyougo.org

CREDENTIAL AS YOU GO
INCREMENTAL CREDENTIALING

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About Credential As You Go

Credential As You Go is catalyzing redesign and integration of credentialing systems across states, higher education, and third-party providers, including employers, to recognize all learners for what they know and can do.

Credential As You Go focuses on building an incremental credentialing system, recognizing that many types of quality credentials (degrees, certificates, industry certifications, licenses, badges, microcredentials) document an individual's learning, and credentials are awarded by many types of providers including community and technical colleges, four-year colleges and universities, third-party organizations, employers, military, and state licensing boards.

For too many learners, the only postsecondary credentials that count for employment are degrees. This focus limits access to further education and employment. Yet, many have acquired valuable skills and knowledge through life and work experience. The U.S. needs a credentialing system that captures and validates all learning.

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Overview

Introduction

Communications and marketing are critical in the effort to transform the nation's degree-centric postsecondary model to an incremental credentialing system.

To support such a major transformation, communications and marketing are needed at three levels:

1 **State and Institution Wide**

2 **Individual credential and program levels**

3 **Nationwide**

This Playbook focuses on the first of these.

Purpose

This Playbook is designed to help you build a state- or institution-wide communications and marketing strategy for incremental credentialing that:
- Is informed by definitions commonly used in the communications and marketing field
- Directs how you will communicate with various audiences, including policymakers, employers, media, and learners and their families
- Achieves your state's or institution's goals for awareness and promotion

Definitions of Key Terms

Channel – A channel is any of the many avenues or vehicles that can be used to deliver communication and marketing messages. Communication channels are the means through which people and organizations interact. There are many different types of communication channels, each with its own strengths and weaknesses. The best way to select the right communication channel is to consider the purpose of the communication, the preferences of the audience, and the time frame in which the message needs to be delivered.

Communications and Marketing Plan – A communications and marketing plan is one that is both strategic and tactical, created to support an organization's or initiative's overall strategic plan. Businesses use marketing plans as a strategic roadmap to organize, execute, and track their marketing strategy over a given period.

Strategic Communication – Strategic communication is an umbrella term to describe the activities of disciplines including public relations, management communication, and advertising. The approach focuses on strategy rather than specific tactics. Strategic communications refers to an organization's planned and purposeful use of communications principles, strategies, and initiatives to further its goals, mission, and/or values. Focus on conveying a specific message that is not necessarily related to advertising. In incremental credentialing, the message may be to make the case for an incremental credentialing system—to raise awareness of new approaches and build commitment to transforming the degree-centric credentialing system to an incremental credentialing system.

Strategic Planning – Strategic planning focuses on the 3C's in a marketing strategy: Customer, Corporation, and Competitors. A detailed analysis of each factor is key to the success of strategy formulation. The 3 C's refer to the following three questions:
- *Customers* – Who are our target customers? What do they want or need? How can we reach them?
- *Company (entity)* – Who are we? What do we do? What can we do? How do we want to be perceived?
- *Competition* – Who are our competitors? What are they doing? How can we differentiate ourselves?

Marketing Strategy – Marketing strategy is an organization's promotional efforts to allocate its resources across a wide range of platforms, channels to increase its sales and achieve sustainable competitive advantage within its corresponding market. A marketing strategy describes how a business will accomplish a particular goal or mission (e.g., including campaigns, content, channels, and marketing software they'll use to execute that mission and track its success). A thorough marketing strategy covers the four Ps of marketing: product, price, place, and promotion. Marketing's main goal is to educate and advertise a product, service, idea, or organization. In our case, the product is availability of specific incremental credential programs—for learners and employers—in your state and/or institution.

PRICE
HOW MUCH DO YOU CHARGE AND HOW DOES THAT IMPACT HOW YOUR CUSTOMERS VIEW YOUR BRAND?

PRODUCT
WHAT YOU SELL COULD BE A PHYSICAL GOOD, SERVICE, CONSULTING, ETC

4Ps
OF MARKETING

PROMOTION
HOW DO YOUR CUSTOMERS FIND OUT ABOUT YOU? WHAT STRATEGIES DO YOU USE, AND ARE THEY EFFECTIVE?

PLACE
WHERE DO YOU PROMOTE YOUR PRODUCT OR SERVICE? WHERE DO YOUR IDEAL CUSTOMERS GO TO FIND INFORMATION ABOUT YOUR INDUSTRY?

Five-Step Approach

Overview

The following five-step approach can help you develop and implement an effective communications and marketing strategy:

1 Define Your Audience

2 Analyze the Landscape

3 Prioritize and Select Communications and Marketing Channels

4 Define Incremental Credentialing Messaging

5 Create An Incremental Credentialing Communications and Marketing Strategy

Each step is described in the next five sections.

Step 1: Define Your Audience

Because incremental credentialing is a new approach to education and training, it is imperative to communicate these changes to a broad array of stakeholders. These stakeholders include learners, employers, college and university faculty and advisors, policymakers, quality assurance entities, and others. All of these audiences will want to know whether incremental credentials are credible, of high quality, and can help those who acquire them reach their education and career goals. In many cases, they also want to know how these credentials already fit within traditional education and training systems. Communications and marketing efforts can help convey these messages to defined audiences. The first step, therefore, is to define your audiences.

A **state-level audience** typically includes:
- State agencies and programs with legislatively defined roles in the learn-and-work ecosystem (e.g., the governor's office; Departments of Education, Labor/Workforce, and Commerce; business services and data systems entities; coordinating boards and commissions)
- Business/employer councils comprising large, mid-sized, and small businesses—for-profit and nonprofit
- Community-based organizations, including those with missions focused on diversity, equity and inclusion (DEI)
- Unions/labor organizations

An **institution-wide audience** typically includes:
- Learners—prospective, enrolled, and formerly enrolled
- School districts that are feeders to colleges and universities
- Employers that employ your learners while they are enrolled, graduates, and work with you on reskilling programs
- Faculty and student support services staff
- Continuing education and outreach units
- Policymakers, including the Board of Regents
- Quality assurance entities, including your institutional accreditor and specialized accreditors for your various programs

To define these audiences, go "granular" by documenting a range of descriptors for them. For instance, list your audience's job roles, priorities, motivation, objectives, media consumption practices, research methods, trusted resources, buying authority, budget, and purchasing processes. When considering individuals within audiences, it may be useful to document their likes and dislikes, habits and skills, education, income, years in role, and other demographic factors. The more clearly and specifically you define your audiences, the better able you'll be to create an effective communications and marketing plan for incremental credentialing.

Step 2: Analyze the Landscape

States, institutions, and organizations are already developing and offering incremental credentials and innovations in credentialing. You may not need to reinvent the wheel. Learn about their communications and marketing approaches as you design and improve your own.

Ask these questions to guide your planning:
- What types of communications and marketing are being used by other states and institutions? If a state is already working to approve or revise legislation related to innovations in credentialing, be aware that communications and marketing go hand in hand with policy change at this level. Policy is a major way in which the broader community learns about developments in credentialing. [See Policy Playbook for additional ideas.]
- Who is taking on the major role of communications and marketing? Is it Information Technology (IT) or Governmental Affairs (for state and institution-wide websites)? Instructional design staff? Communications staff? Continuing education units? Is the task outsourced to a public relations or marketing firm?
- How do these various entities differ in their communications and marketing approaches?
- What strategies and tactics have proven successful in getting the word out?
- What are the biggest challenges you likely will face in getting the word out, and how can you prepare to meet them?

Step 3: Prioritize and Select Communications and Marketing Channels

Getting the word out effectively about your incremental credentialing initiatives will require both communications and marketing. Here are key channels (delivery methods) commonly used to get the word out about a state's or an institution's strategy on incremental credentialing:
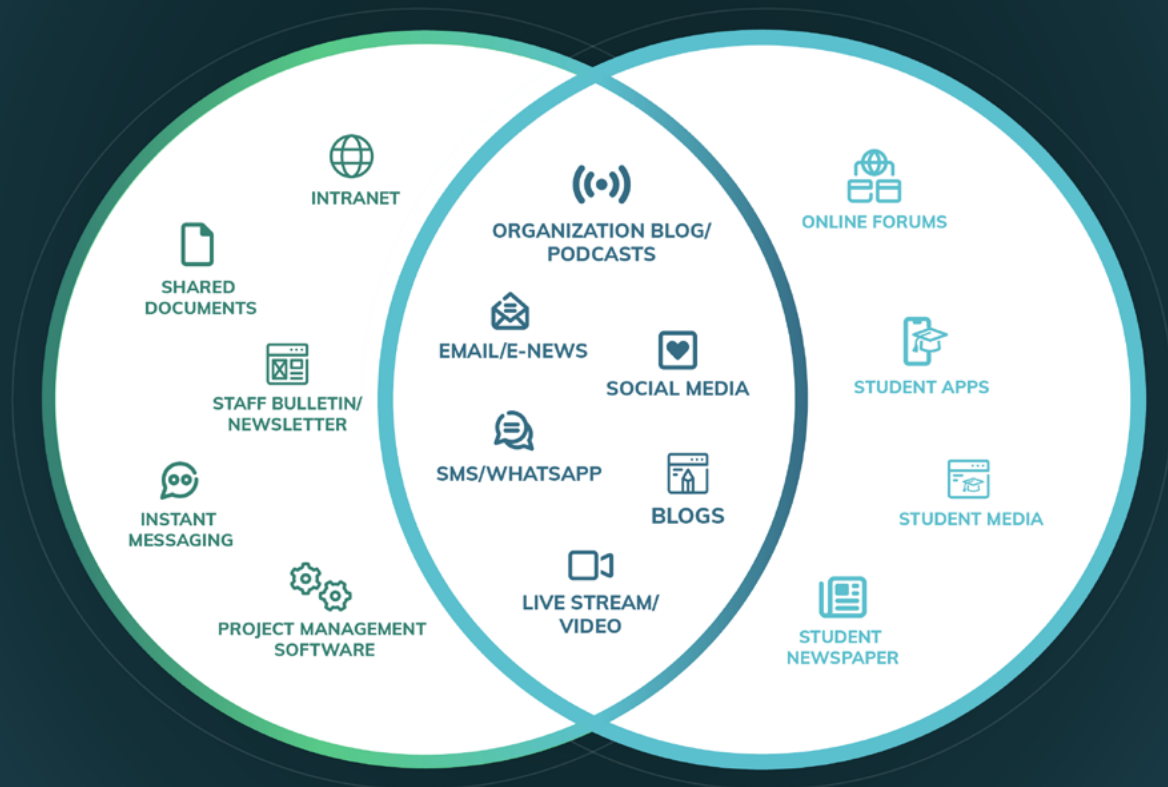
- Governors may promote changes in their state's credentialing system through speeches, announcements, and face-to-face meetings
- Speeches by state and institution leaders calling for changes are vital— particularly calls for new legislation and for specific actions that convey the scale and scope of the changes needed
- Focused agenda items on state and institutional board and agency meetings
- Legislative and state agency policy setting and dissemination
- Campaign (might be an ad campaign that markets innovations in curriculum or a direct mail campaign to students — especially former students who left with some college but no credential who might benefit from a new array of incremental credentials)
- Websites and digital platforms (state websites typically report approval of new programs). (See example below of Statewide Websites/Platforms)
- Employers' presentations and trade newsletters
- Social media and traditional news media
- State-level data systems that include incremental credentials
- Institution-wide approaches to verifying incremental credentials on college transcripts
- Podcasts
- Posters/fliers/brochures featuring messages and new credentialing programs

Communications along multiple channels can garner state- and institution-wide attention and will be needed to build awareness of the changes needed—and underway—in credentialing. Remember that some channels are internal, some are external, and some channels reach both internal and external audiences.

COMMUNICATION CHANNELS

- ORGANIZATION/UNIVERSITY COMMUNICATION (INTERNAL)
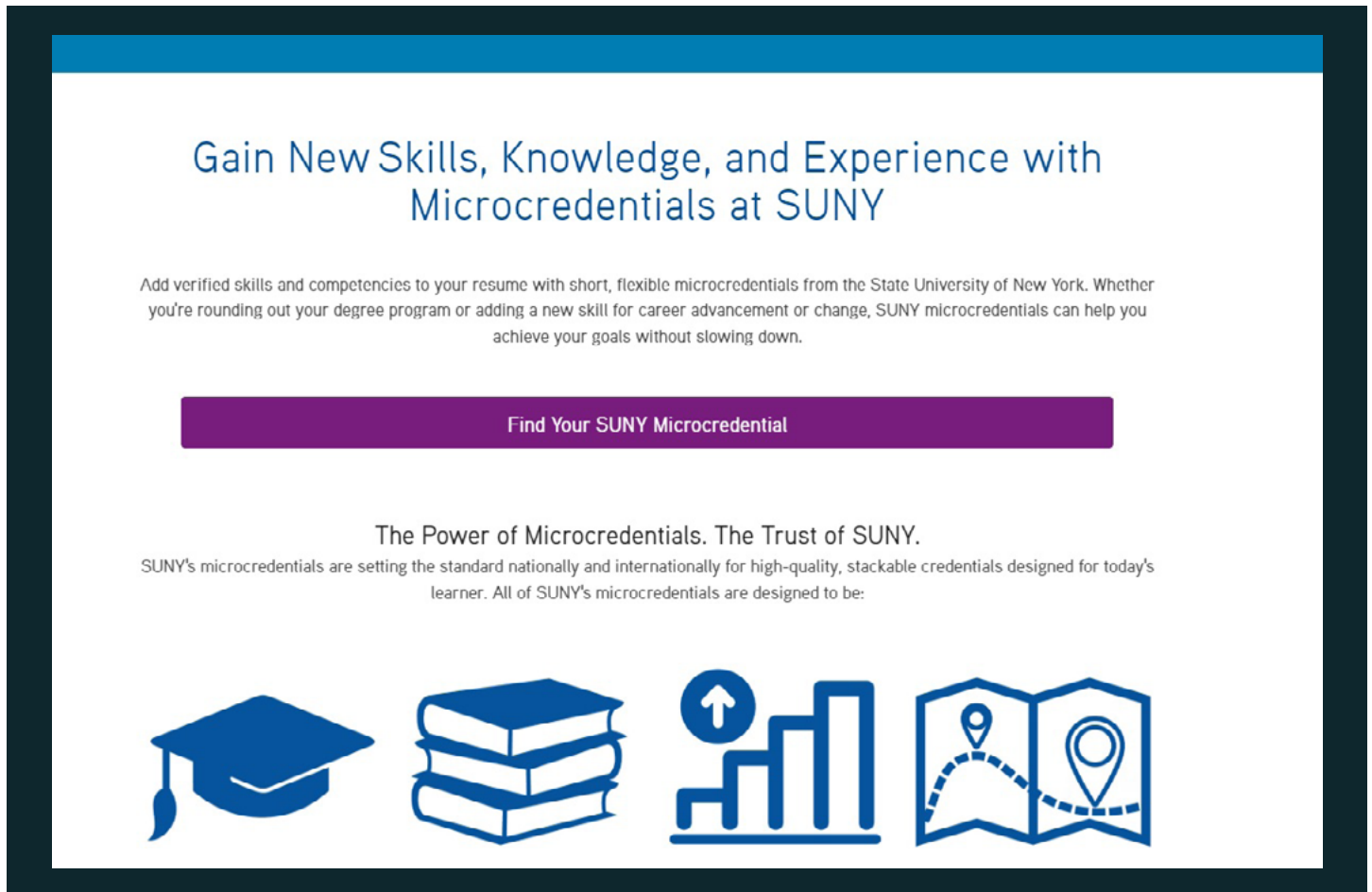- STUDENT COMMUNICATION (EXTERNAL)

INTRANET

SHARED DOCUMENTS

STAFF BULLETIN/ NEWSLETTER

INSTANT MESSAGING

PROJECT MANAGEMENT SOFTWARE

ORGANIZATION BLOG/ PODCASTS

EMAIL/E-NEWS

SOCIAL MEDIA

SMS/WHATSAPP

BLOGS

LIVE STREAM/ VIDEO

ONLINE FORUMS

STUDENT APPS

STUDENT MEDIA

STUDENT NEWSPAPER

A VENN DIAGRAM SHOWING DIFFERENT CHANNELS OF COMMUNICATION WHICH ARE DISPLAYED WITH WORDS AND ICONS

Digital channels are becoming increasingly popular as they are typically quicker and more convenient than traditional methods. They also allow for a greater degree of flexibility, as they can be used from any location and at any time. Digital channels often provide a more personal touch than traditional methods, as they allow for the use of images, videos, and other rich media. There are nearly 20 modern digital communication channels. Some are used primarily within organizations like higher education institutions, and some enable messaging to broader, external audiences such as learners and their families.

- **Instant Messaging apps** allow users to send text messages in real-time
- **Video calling apps** allow users to make voice and video calls from any location
- **Voice calling apps** allow users to make voice calls from any location
- **Email** is a digital communication channel that allows users to send and receive messages
- **Webinars** are digital events that allow a large number of people to attend remotely

- **Online courses** are a type of digital communication that allows users to learn new skills from any location
- **Podcasts** are a type of digital communication that allows users to listen to audio content from any location
- **Web conferencing platforms** allow users to host and attend online meetings
- **Screen sharing apps** allow users to share their screens with other users in real-time
- **VoIP (Voice over IP)** allows users to make voice calls over the internet
- **Cloud communication platforms** allow users to manage their communications from the cloud
- **Unified communications platforms** allow users to manage all of their communications from one central platform
- **Collaboration tools** allow users to work together on projects in real-time
- **Project management tools** allow users to track and manage projects from any location
- **Online communities** allow users to connect with others who share similar interests
- **Gamification** uses game-like elements, such as points and badges, to engage and motivate users
- **Augmented reality (AR)** overlays digital content in the real world
- **Virtual reality (VR)** creates a simulated environment
- **Wearables** such as smartwatches and fitness trackers allows users to access information and interact with applications from their wrists

Example of a Statewide Website Communicating the Availability of a Statewide Platform for Microcredentials and Marketing Microcredentials in New York

[*Find a Microcredential at SUNY](#)

Step 4: Define Incremental Credentialing Messaging

Messaging is key in every marketing and communications plan. It instructs how incremental credentialing is communicated to each of your defined audiences. Create a list of key messaging points about incremental credentialing and your specific credentialing options for your defined audiences. *What do your audiences need to hear?*

Step 5: Create and Manage the Communications and Marketing Strategy

As you build your communications and marketing strategy for incremental credentialing, don't look at it as being "set in stone." Rather, consider it a guide to your communications and marketing efforts that will be subject to change as you implement it. An effective plan will combine elements of strategic communications and marketing to effectively inform audiences.

Multiple entities must combine to carry out an effective strategy at the state- and institution-wide levels. Considering your various audiences and the channels of delivery selected to reach them, identify which entity will roll out and manage each of the activities in the work plan. In some cases, a state's public information office may manage the plan, or communications offices within state agencies will be responsible for various features of the plan. At the institution-wide level, a communications office often can help manage the work plan, monitoring the efficacy of various components of the plan and reporting back to institution leadership. These types of feedback loops are important to ensure that the work plan is revised as needed. Where institutions have an Office of Innovation, it may be helpful for that office to work closely with the communications office.

Conclusion

Marketing and communication efforts around incremental credentialing are important. Your role within the movement is important as well, and will determine the success of this work. We hope that the steps described here will give your marketing and communications teams a head start.

Additional marketing and communications resources will be added to this Playbook as they are discovered. To share your specific examples, please email: info@credentialasyougo.org or submit examples here.

Resources for Further Information

To view all the following resources on a single page online, use the QR code or please visit: https://credentialsyougo.org/playbooks/building-a-communications-and-marketing-plan-for-incremental-credentialing-for-a-state-or-institution-introduction/resources-for-further-information/

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Marketing strategy: https://en.wikipedia.org/wiki/Marketing_strategy

Marketing strategy: https://blog.hubspot.com/marketing/marketing-plan-examples

Marketing strategy: https://www.investopedia.com/terms/m/marketing-strategy.asp#Marketing%20Strategies%20vs.%20Marketing%20Plans

State University of New York: https://www.suny.edu/microcredentials/

Strategic communication: https://www.oxfordbibliographies.com/display/document/obo-9780199756841/obo-9780199756841-0007.xml

Strategic planning: https://en.wikipedia.org/wiki/Marketing_strategy

The 3 Cs of Marketing – Company, Customers and Competition. www.marketing91.com/3-c-concept-marketing-strategy/

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Additional Resources

Please check our website for updated content, strategies, and examples:
www.credentialasyougo.org