



Chancellor's Recommendation Group for the Future of Integrated Marketing at UW Oshkosh

Executive summary of recommendation

A team of faculty and staff was charged with the task of making a recommendation regarding the future staffing and direction of an integrated marketing communications strategy at UW Oshkosh. This Chancellor's IMC Study/Recommendation Group was headed by Jamie Ceman, Assistant Vice Chancellor of the Office of Integrated Marketing and Communications (hereafter OIMC).

The group was composed of the following members:

Jamie Ceman (chair), AVC OIMC

Mandy Potts, OIMC

Peggy Breister, OIMC

Ivana Milosovic, College of Business

Lori Halstead, University Staff Council appointee

Brandon Miller, AVC Enrollment Management

Brian Klinger, Administrative Services

Ashley Meyer, Student - Oshkosh Student Association appointee

Melissa Bublitz, College of Business

Richard Marshall, Senate of Academic Staff appointee

Sara Steffes Hansen, College of Letters and Science

Stephen Kercher, Faculty Senate appointee

Team members drafted recommendations and presented them to administrators and staff members from units across campus who would be directly impacted by them. The team conducted interviews with these administrators and staff members and spoke with individual staff members within the OIMC who were not serving on the Study Group but whose opinions about proposed changes were deemed important to obtain.

Team members listened to the needs of the campus community as well as the concerns of staff members who would be impacted by any potential organizational change. The group remained focused on the key goals of this study—which are to move UW Oshkosh closer to optimal *strategic alignment of resources, operational efficiency, constituent experience and risk management*—while also paying heed to the necessity of forging a creative, respectful working environment that is capable of producing great work on behalf of the institution. With a significant reduction in state funding for UW System and the current enrollment challenges at

UW Oshkosh, there is a great urgency to find new modes of productive collaboration that help improve campus-wide marketing and communication efforts.

Throughout the process of analyzing the current practice of integrated marketing and communications at UW Oshkosh, it became very clear that this institution is fortunate to rely upon many talented and dedicated marketing and communications professionals. We believe that if the recommendations enumerated below are executed in a careful manner—a manner which respects the concerns that have surfaced through the course of our fact finding—the OIMC will be poised to bring these talented professionals together and empower them to help re-invent the process of collaborative, creative marketing and communications at UW Oshkosh.

There are a number of ideas that the Study/Recommendation Group put forth that received wide support across campus. We recommend:

- The university creates an *advisory council* with broad representation to set strategic measurement goals and navigate conflicts or difficulties that arise.
- The OIMC creates a robust *self-service tool-kit* for campus customers. This will help create routine and efficient communications and facilitate adherence to university brand standards across campus, all while helping to reduce the workload of OIMC staff.
- The OIMC enhances the *existing account liaison system* to ensure broader campus representation and consultative services.
- The OIMC works with unit managers to develop transparent and collaborative processes supported by *key campus gatekeepers such as Document Services and Administrative Services* to facilitate greater integration marketing efforts to external audiences.
- The OIMC develops a *brand consultation process* in order to increase service and collaboration across campus.

The Study/Recommendation Group recommends a phased-in approach toward increased integration of marketing and communications staff across campus. This approach will allow individuals currently dedicated to units outside the OIMC to help define what a new office can be while minimizing disruption to campus unit/department offices that rely on dedicated staffing.

Specifically, the first phase of integration will begin with one Admissions staff member and three Lifelong Learning & Community Engagement staff members relocating to the OIMC and structured as a new marketing team devoted to student recruitment. This team will provide a strategic marketing focus on the institutional priority of attracting more students.

At the same time, reporting lines for marketers working in units/departments outside of OIMC will move to the OIMC. These marketers' office locations will not change, and the primary focus of their work will continue to serve the needs of their home unit. By leveraging their existing departmental relationships but increasing collaboration, the OIMC will create opportunities to increase efficiency while implementing a more cohesive message strategy across campus.

An IMC Implementation Team, composed of individuals with expertise in budget, organizational change and human resources management, will assist OIMC management and staff with the transitions described above. Impacted units, the OIMC, and the IMC Implementation Team will work together on a staffing study and collaborate on establishing how success will be measured and evaluated with this first phase of integration. A transitional period will need to take place during early implementation where workload of unit marketers continues at current levels while being integrated into a central team and workflow. Unit managers, marketers and the new OIMC will need to work closely together to reduce disruption while efficiencies are gained through this integration.

It is important to note that the team significantly modified this recommendation based on feedback obtained from impacted units and issues raised by several team members. There were concerns over current challenges (structure, relationships, process, workload) between OIMC and various units on campus. Therefore, the team arrived at a workable consensus regarding ways to improve unit, manager and staff buy-in. A team composed of OIMC staff, the newly formed student recruitment team and dedicated marketers in campus units will work to measure the effectiveness of current marketing efforts and implement best practices in recruitment marketing. By giving team members a voice in the design of their future work, the OIMC will draw upon their expertise as embedded marketers—professionals who understand our current recruiting practices and who are poised to help improve collaboration, interdepartmental working relationships and, in the long run, improve the chances of gaining buy-in over time. If executed thoughtfully and in the spirit of true collaboration, the changes that come to the new OIMC will generate enthusiasm, creative energy and, ultimately, great marketing and effective communications on behalf of UW Oshkosh.

Background of study/recommendation group activities

The Chancellor's IMC Recommendation Group was charged with evaluating the models suggested in the Chancellor's Study Group-IMC White Paper. It evaluated organizational models contained in the White Paper against key performance indicators:

Strategic alignment

How well are our resources aligned with the highest priorities and mission objectives of the institution?

Operational efficiency

How well are we maximizing throughput with the resources available across campus?
How effectively do we facilitate the maximization of throughput of other departments/units across campus?

Constituent experience

How consistent, effective and coordinated is the experience for our key audiences?
How efficient and seamless are communications with campus customers?

Risk management

How well are we assuring the quality and consistency of our institutional identity and message? How well do we measure our effectiveness? Are we able to show a return on our investment?

The Study/Recommendation Group met with governance groups and hosted open campus forums in order to obtain feedback, generate discussion and respond to concerns relating to the models presented in the study.

Each model presented in the White Paper moved the campus progressively toward greater integration of both communications and resources. Through extensive listening and dialogue with UW Oshkosh administrators, faculty and staff, a consensus emerged. In sum, we determined that marketing and communications on campus need to move toward greater integration.

The Study/Recommendation Group came to see that a greater integration of marketing and communications would help:

- Create a more equitable distribution of resources since many departments/campus units are currently under-served or experience long wait times for services while others have dedicated staff.
- Allow the flexibility to align dedicated staff role assignments to individual strengths, skills and training, resulting in high-quality, efficient operations.
- Mirror a consultative account services approach (agency model) where staff work with departments/campus units to execute professional, high-quality communications designed to accomplish their individual goals and objectives.
- Promote organized, coordinated communications efforts across campus that work cooperatively toward institutional priorities and efficiently utilize our collective resources.

The Study/Recommendation Group acknowledges and recommends that the process of integration needs to be done responsibly, collaboratively and through a process that is phased-in over time, recognizing that one size does not fit all when it comes to integrating resources.

The process to move toward greater integration needs to first address the concerns raised by the campus community, while also providing venues for ongoing input and transparency. Additionally, stakeholders need to define what constitutes success and how that success is to be measured.

Concerns that surfaced through listening sessions and other interactions with members of the campus community are as follows:

- There is concern that further integration means greater “control” by a single unit (the OIMC) on campus. Therefore, there needs to be a robust system of checks-and-balances in place and a forum for campus collaboration and voice.
- Institutional priorities need to be clearly defined so as resources shift to align with those priorities, the campus community is aware of and participating in determining what those priorities are.
- Marketing staff housed in other departments or units across campus have job duties and responsibilities that are intricately intertwined with other critical functions of those departments. It is not easy to separate what are pure marketing functions from other job duties. Even where there are more clear delineations, care and consideration ought to be given to minimizing the disruption any staffing changes create for a unit’s marketing work in progress as well as the other duties performed by people in a marketing role.
- If resources are shifted to a new area, consideration needs to be given to what is being lost by the unit/department the resources came from. Solutions ought to be provided to those units/departments in a timely manner.
- If marketing positions are to be integrated into a new OIMC, consideration needs to be given to maintaining those roles through the current reduction in campus workforce. Success may be at risk if positions are integrated and then subsequently lost through workforce reduction.
- If dedicated staff are lost in some units, time-to-deliver projects may become a challenging issue for those needing to move quickly.

Our recommendation

In order to address the desire for further integration while addressing concerns raised by the campus community (detailed later in this document), the Study/Recommendation Group outlines the following plan:

1. The OIMC, with the assistance of campus governance groups, will immediately *establish an IMC Implementation Team*, which will launch change as outlined by the Chancellor’s decision.
2. An *IMC Advisory Council* with broad campus representation will also be created. The structure and charge of this group will be determined in consultation with campus governance and leadership. The Advisory Council will establish success metrics that relate to the key performance indicators outlined in the White Paper. This group will also serve as the campus voice in the integrated marketing communications strategy and create a venue for campus faculty and staff to bring concerns, issues or ideas.
3. To alleviate the concerns relating to project time-to-deliver, the OIMC will immediately commit itself to *providing campus units with a more robust toolkit of self-service options*. Toolkits will consist of basic marketing materials that any user should be able to customize to their own needs. This will allow greater efficiency in project completion while also providing templates to campus units which support a greater consistency of our UW Oshkosh identity and message.

4. The OIMC will *enhance the current account liaison system*. It will create a more robust account management system—one which will provide campus units/departments/individuals with a clear point of contact for questions and communications support. Identifying a contact person for all campus clients will allow improved client service and provide a valuable resource for campus units/departments to leverage when they need marketing and communications assistance.

5. The OIMC will work with unit managers to develop transparent and collaborative processes supported *by key campus gatekeepers such as Document Services and Administrative Services* to facilitate greater integration of marketing spending, advertising contracts and the consistency of self-service materials.

6. *A brand consultation process will be established* in order to provide feedback to campus units creating communications outside the OIMC. This service will enable campus units/departments to consult with the OIMC on brand guidelines. This process will allow greater collaboration around the message and timing of communications targeting key audiences.

Summary of staffing recommendation

The models presented in the White Paper were intended to demonstrate a continuum of integration, establishing options for how staffing could be managed while serving the goal of moving UW Oshkosh over time toward a higher level of coordination and collaboration.

We recognize that any organizational change needs to be executed carefully and with great sensitivity to the units/departments and the people involved. Consideration also needs to be given to the level of disruption it creates, allowing change to take place in a way that is both supportive and supported.

Phasing in organizational change over time will allow work to take place between the newly integrated OIMC and the unit from which the dedicated staff came. Both parties, in conjunction with a newly established IMC Advisory Council, will need to collaborate on the establishment of success metrics.

In the end, then, we recommend the following approach for moving marketing and communications at UW Oshkosh toward greater integration:

- The first phase of integration will begin with one Admissions staff member and three Lifelong Learning & Community Engagement staff members relocating to the OIMC and structured as a new marketing team devoted to student recruitment. The Admissions Office has an additional marketer whose role was adjusted in this recommendation based on feedback from the unit. This individual's talent and knowledge is critical to the success of the team. At the same time this individual will act as a "bridge," enhancing critical working relationships between the new OIMC recruitment team and the Admissions Office.

- Reporting lines for marketers working in units/departments outside of OIMC will move to the OIMC, but their office location will not change. Their work will primarily focus on serving the needs of their home unit. By leveraging their existing departmental relationships but increasing collaboration, the new OIMC will create opportunities to increase efficiency while implementing a more cohesive message strategy across campus. The IMC Implementation Team, composed of individuals with expertise in budget, organizational change and human resources management, will assist OIMC management with the transition and with a staffing study. Impacted units, OIMC, and an IMC Implementation Team will work together to establish how success will be evaluated with this first phase of integration.

NOTE: Interviews conducted with units identified three dedicated unit marketers (in Admissions, Career Services, and the College of Business MBA Office) whose precise time commitments to marketing within their current role need further evaluation before a reporting change would be considered. The new OIMC would work collaboratively with these units' leaders to establish areas for greater integration in the future.

- Through the process of implementation, unit managers in collaboration with OIMC will evaluate budget and marketing spend efficiency. In the short term, gatekeeper offices will help manage the contracts for marketing spend in order to determine if coordinated buys will help save money and improve timing and location of advertising.

Important notes and factors to address during implementation

Throughout the change process, greater integration of unit/department marketing staff, implementation of the toolkit, and the introduction of greater efficiencies and streamlining of many processes should allow for greater capacity from the whole team. However, we believe successful change may take 3 to 5 years to be fully realized. Further structural change may be needed to provide additional marketing support to the broader campus community after implementation of the initial phase.

It is recognized that cultural differences exist between OIMC and units where decentralized staff currently reside. In order for organizational change to be successful, all parties, including OIMC, should be willing to adjust to new processes, work policies and environments. Talent and knowledge is abundant in every individual involved in this change, and the benefits of learning from each other will create a dynamic and rich new working environment.

Organization changes take time to implement, and identifying staffing needs and the full scope of workload will also require thoughtful deliberation. Because of that, we believe that in order for this change to be successful there needs to be a 3- to 5-year period where staffing levels in the new central office will not be reduced.

Additional concerns to note:

The Study/Recommendation Group focused attention on identifying key concerns from units impacted, as well as the broader campus community. Success, we found, will be contingent on listening closely to these concerns and addressing them systematically.

Concern A: The OIMC is presently overworked and understaffed. Marketing communications across campus are not consistent and cohesive. Units across campus are underserved while others have dedicated resources. Even units with dedicated resources don't always have the right skill set to do the work and keep communications consistent across campus.

Response: In addition to creating a new toolkit (see above), it might be advisable to reinvent the process (currently gathered through a weekly meeting called Story Champs) for sharing/creating information to support the university's content strategy. This solid, though underutilized concept needs to be tweaked and rebranded with the collaboration of unit marketing leaders. Additionally, training and team-building activities could be devised which will help grow staff knowledge and encourage interactions that support a fun, creative and productive work environment. The new OIMC ought to become a hub for collaborative training and team building.

Concern B: In service to the broader campus priority of increasing student enrollment, the staffing recommendations contained herein result in the shifting of significant resources from one unit (LLCE) in order to support campus recruitment (through OIMC) as an institutional priority (with Admissions). Under this recommendation, no other unit stands to lose as many FTEs during the process of restructuring/realignment as does LLCE. There is concern that this unit has successfully leveraged their resources in the past in order to create a customized marketing team and that the proposed shifting of resources will create the impression that innovative pursuit of new program revenue may not be rewarded but rather put a unit's resources at risk. LLCE management provided the team with a feedback statement to proposed changes. The statement proposed to shift their dedicated marketing staff to a reporting change aligned more with other staffing changes for units like COB, COEHS, Athletics, and Alumni Relationship & Foundation. LLCE expressed a willingness to collaborate more with OIMC and units outside of OIMC to help coordinate creative recruitment marketing practices for both graduate and undergraduate students.

Concern C: Recruitment leadership indicates that strategic marketing needs to be implemented on this campus while simultaneously building bridges among leadership and marketers in the key offices that support enrollment management.

Response: Filling these gaps will help the university bring in more students, program revenue, and alternative sources of funding. It is important that any effort here not undermine any department or unit already working to do this important job across campus. There are significant initiatives recommended here that will help build a strategic enrollment management strategy with recruitment marketing being a key piece of that strategy. The new collaboration must play a role in helping define, through market

research, the new recruitment marketing campaign. It will implement marketing technologies (CRM, CMS and Marketing Automation) in order to build the necessary communication platform for future enrollment growth, and it will implement best practices in contact strategy for prospective students (undergraduate, graduate and adult learners) in support of our enrollment strategy.

The motivation for this organizational change is positioned as a way to create a team well equipped to craft and execute focused marketing strategies designed to attract more quality students to UW Oshkosh. While this recommendation outlines a plan to restructure and then evaluate the staffing needs for a recruitment marketing team, alternative plans have also been proposed and considered. One key reason why this recommendation suggests changing staffing first is because past attempts to collaborate without direct reporting relationships and accountability (i.e., those based on voluntary cooperation) have received little support from external units. Another key reason for recommending staffing changes first is to gain their buy-in and trust by involving them immediately in the development of the strategic recruitment marketing plan.

Concern D: The Study/Recommendation Group perceived differences in workplace culture between the OIMC and units/departments with whom they collaborate. Clearly, a renewed trust needs to develop among unit managers and staff across campus. A perception exists that OIMC can be difficult to work with and that it does not allow internal customers to share creative control. Timelines for submitted projects are sometimes extremely long, and the OIMC often does not have the capacity for short turn-around projects. This situation has created extreme levels of stress within OIMC, and that stress may be contributing to turnover in OIMC.

Response: As marketing practice has shifted toward more digital and social marketing tactics, the work of staff and the OIMC as a whole has changed. One of the biggest challenges OIMC faces is that many of the jobs responsible for marketing communications have changed. With the assistance of the IMC Implementation Team and HR, the OIMC needs to examine the job descriptions of all personnel (inside OIMC and across campus) devoted to marketing communications responsibilities and compare those descriptions to OIMC staff members' current job duties.

This information could help the transition team understand the challenges of constructing a cross-functional team as well as the personnel and skills needed to realize the vision of reinventing not only the OIMC but also the marketing practices that we expect will fuel organizational success in the future.

It is clear from interviews conducted by members of the Study/Recommendation Group that the staff within OIMC enjoy working with their colleagues and take great pride in their work. It is also clear that when we compare the work environments of people inside and outside OIMC performing marketing functions there are stark differences. People external to OIMC fear losing their autonomy and flexibility. Research shows that in a work

environment having a sense of autonomy, control and flexibility in your job can increase both job satisfaction but also performance (Rock 2008). Rather than look at how to adapt external marketing staff to the internal workplace culture of OIMC, we recommend examining best practices in management and leadership to create a new culture that maximizes the productivity and job satisfaction of all staff inside and outside of OIMC.

In addition, conflict arises from perceptions of fairness inside and outside the OIMC. To create the creative and collaborative environment that will lead to job satisfaction and, in the end, quality work, the OIMC and its Advisory Group need to encourage managers to create an environment in which people are valued, empowered, respected and supported so that it will be poised to attract and retain the best and brightest marketing talent.

Definition of Organizational models

The White Paper presented four organizational models for campus units' deliberations. We are currently recommending a hybrid of Model 2 and Model 3 unit-dedicated marketing staff.

Definition of Model 2 - Distributed Coordinated Marketing Team

The key objective of Model 2, proposed for non-recruitment marketing staff, is to maximize efficiencies within units/departments that retain dedicated marketing staff and thereby increase the level of integration across campus. In this model, the unit's/department's dedicated marketing staff report to OIMC but remain committed to their unit/department *while their work, skills and departmental needs are further assessed*.

One key benefit of being more directly a part of OIMC staff is to create a team of people who share similar job functions and can reduce redundancies in areas such as project management, workflow and media purchasing.

The following chart highlights key aspects of Model 2

Dimension of Work/Staff	<i>Current Dedicated Staff Model</i>	<i>Model 2</i>
Staff Reports to:	Department/Unit Manager - Dean	OIMC
Staff Member sits:	Embedded within Department	Embedded within Department
Work is requested by:	Unit manager and staff working together	Unit completes a Project Request Form online or contacts the staff member who is their assigned account liaison. The staff member

		works with OIMC to log the project and get a team assigned
Work is managed by:	Staff Member	Staff Member
Work is completed by:	Staff/Mktg Generalists/Students	Staff member and OIMC Team/Mktg Specialists/Students
Work is approved by:	Staff working with manager/project requestor plus OIMC for brand review where applicable	Staff member working within OIMC process and manager/project requestor
Effectiveness of work is measured by:	Department or unit-level definition of success with varying degrees of measurement	Metrics agreed upon by the unit and OIMC considering a balance between unit and organizational priorities together with best marketing measurement practices
Budget/Marketing Spend managed by:	Department/Unit	Department/Unit in partnership with OIMC

Definition of Model 3 - Recruitment Marketing Team

The key objective of Model 3, proposed for marketing staff in the Office of Admissions and LLCE, is to maximize utilization of individuals and their unique talents and thereby increase overall effectiveness, efficiency and integration of the marketing communications at UW Oshkosh for units with the primary function of recruiting students all across this campus.

One key benefit of incorporating marketing staff from these other units within OIMC is that this will help create a topnotch, dedicated team of professionals who share the same goals and objectives and are able to focus their collective talents on pursuing one vital objective: recruiting students to attend UW Oshkosh. This new collaboration will also help complete projects more effectively, simultaneously increasing individual efficiency (reducing project completion times will allow more work to be completed for the university as a whole) and the effectiveness of OIMC marketing communications as a whole (leveraging individual talents within a project team to create more synergistic, cohesive communications across campus).

The following chart highlights key aspects of Model 3

Dimension of Work/Staff	Current Dedicated Staff Model	Model 3
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Staff Reports to:	Department/Unit Manager Dean	OIMC
Staff Member sits:	Embedded within Department	OIMC
Work is requested by:	Unit manager and staff working together	Unit completes a Project Request Form online, or contacts the staff member who is their assigned account liaison.
Work is managed by:	Staff Member	The liaison or an OIMC team member with appropriate skillset
Work is completed by:	Staff/Mktg Generalists/Students	OIMC Team/Mktg Specialists/Students
Work is approved by:	Staff working with manager/project requestor plus OIMC for brand review where applicable	Account Liaison working with manager/project requestor
Effectiveness of work is measured by:	Department or unit level definition of success, or not currently tracked	Established metrics between the unit, OIMC and IMC Advisory Council
Budget/Marketing Spend managed by:	Department/Unit	OIMC