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Adult Learners: A Targeted Marketing Approach

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Clark University School of Professional Studies

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Executive Summary

The development of the *Adult Learner Capstone Project* started with a focus and need to learn more about affinity groups in the Worcester area in order to reach the potential adult learner demographic. Although some partnerships already existed, the Director of Marketing and Communications for Graduate Admissions, Tara Probeck, yearned to explore the potential partnerships and alternative uses of professional organizations to market to the current working professionals. From this idea, our capstone project was introduced in hopes of establishing a comprehensive and exhaustive list of potential organizational partnerships, specific for the School of Professional Studies.

In order to fully understand the market, we learned more about the adult learner demographic, specifically their motivations of earning a master's degree, challenges that arise in their decision making of returning to school, and so on. After gaining more knowledge on the demographic and the climate of the market, we gathered primary research about professional organizations in Central Massachusetts through phone call interviews and in-person meetings. Through these dialogues, criteria for each organization was collected to understand the purpose of the organization, events held and type of attendees. From these conversations, we gained a better sense of how the School of Professional Studies could partner with the organizations in order to access the adult learner demographic.

Throughout our research, a recurring salient issue was a lack of clarity around the term "adult learner". The adult learner demographic is defined in general terms, referring to a wide age range and differing occupations. The term is also used to describe adult students earning either a bachelor or master degree. While conducting research about the demographic and

gathering data from the professional organizations in the Worcester area, it was evident that a tailored approach was necessary to effectively partner with organizations and reach specific divisions of the working professional population. Due to this, we created research-based segments within the adult learner demographic, therefore allowing us to generate a tailored approach for each division in relation to each professional organization.

From gathering research, primary and secondary, we were able to collaborate our findings into a cohesive and tailored action plan. In many ways, we provide our client with a roadmap of how to establish successful partnerships with each of the 12 organizations we contacted. Our actionable solution has a focus on presentation-type events that would allow constituents of the School of Professional Studies to act as ‘experts in the field’ about a particular topic that would be of interest to the event attendee. We also emphasize a correlation between presentation topics and current School of Professional Studies courses to provide attendees a sample of the program offerings. Through our research and analysis, we feel there is a lot of potential for the School of Professional Studies to utilize and establish partnerships with professional organizations in Central Massachusetts, which will in turn help spread awareness and connect the program to more potential adult learners. Throughout our proposal, we will outline a specific and tailored marketing approach that will aid in accessing a range of potential adult learners.

I. Introduction

Background

Clark University is a private research university for undergraduate and graduate education located in Worcester, Massachusetts (Clark University, 2018a). Clark University's mission is to educate undergraduate and graduate students to be contributing citizens of the world and to advance the frontiers of knowledge and understanding through rigorous scholarship and creative effort. Incorporated in 1887, founder, Jonas Clark, created the institution during the great philanthropic college boom of the late 19th century (Seim, 2013, p. 18). Since its founding, Clark University has grown to become a well-known institution rooted in innovation, research, scholarship and community. With a number of undergraduate, graduate and PH.D. programs, Clark is on the cutting-edge of education. Clark University has nineteen master degrees, ranging different fields and skills. The School of Professional Studies is one of Clark's graduate schools, which first was founded as "The Evening College of Clark University" (Clark University, 2018a). In 1975, The Evening College became the College of Professional and Continuing Education (COPACE), and in 2016 was renamed the School of Professional Studies (SPS) (Clark University, 2018b).

The School of Professional Studies is designed to help students prepare for and take advantage of the changing workplace. Clark University's School of Professional Studies provides the competencies and transformative experiences that serve as a catalyst for the continued capacity of personal and professional growth. There are three main degree programs within the School of Professional Studies, Master of Public Administration, Master of Science in Information Technology, and Master of Science in Professional Communication. Through these

programs, the School of Professional Studies has developed a diverse student body with mid-career professionals or adult learners, international students, and accelerated degree program (ADP) students. (Clark University, 2018c). For our capstone defense, our client is Tara Probeck, Clark's Director of Marketing and Communication for Graduate Admissions. Tara works directly with the School of Professional Studies as well as the three other main graduate schools in establishing specific marketing strategies for each unique program.

Statement of the Problem

Due to the diverse student body of the School of Professional Studies, there were different marketing strategies needed to reach each student group, specifically adult learners, international students and ADP students. With this in mind, SPS was in need of research and a targeted approach to reach the mid-career working professionals or adult learners in order to spread awareness, and increase engagement, translating into a goal of increased enrollment. The purpose of this project is to aid SPS in having more success when marketing to adult learners. Our project aims to assist Tara Probeck and SPS to better understand the variety of the adult learner demographic and effectively target organizations in ways that will increase engagement among adult learners in Central Massachusetts. Our recommendations provide a targeted approach that will allow SPS better access to interact with the adult learner population. In the following chapter, we will discuss the unique demographic of the adult learner population in detail. We will also synthesize important research in higher education marketing and trends in the industry. The literature review section will bring the reader to a qualified level of understanding on the research topic, informing the reader with the context in which our research is situated.

II. Literature Review

Due to the changing workplace and the rapid growth of technology, there has been a focus on the concept of lifelong learning in order to keep up with the dynamic trends of the workplace. Many universities are targeting working professionals to obtain post-secondary degrees due to the immense need in the workforce. It is estimated that “by 2018, 63 percent of all jobs will require some postsecondary education” (Brown, n.d.). Due to this requirement, a gap has been created since less than half of the workforce hold post-secondary degrees. According to this data, the workforce is in need of 3 million credentialed workers (Brown, n.d.). The largest available population to fill this void is the current working professionals. Universities are using this data to tailor programs to fit the target population of working professionals or adult learners. Adult learners are defined as individuals who are seeking a degree at any level, with a minimum of three years separation from any other formal study. It is typical that adult learners are over the age of 24 and have been in their field of work yet are eager to return to their studies to continue their education after a lapse in time.

In today’s society and the changing workplace, working professionals are becoming more motivated to earn a post-secondary degree. There are several motivational orientations that provide reasoning for adults to seek additional degrees. Some factors include communication improvement, social contact, educational preparation, professional advancement, social stimulation and cognitive interest. More specifically, it is researched and studied that adult master students are motivated largely “by professional advancement or career change, and personal desire to learn and become more competent” (Francois, 2014, p. 22). Earning a master’s degree improves marketability, skill building, and allows working professionals to gain

competencies and knowledge aligned with their specific career goals (Cohen & Greenberg, 2011, p.102).

Adult learners are unlike any other student, most drastically in age and stage of life. There are many different brackets that adult learners can fall into within their career. Adult learners can be a young working professional, aging from 25 - 35, who is just becoming comfortable in their career yet wishes to move up the ladder. An adult student could also be a middle manager, aging from 30 - 40 who wishes to learn a specific competency in their field, or is an executive and more seasoned employee 45 - 55, looking to make a career change. Due to this, there are many unique characteristics of this target population that must be researched in order to successfully market to them. Adult learners are typically self directed due to their experience in the workforce, desire a practical and results-oriented curriculum, are slower to learn yet have more integrative knowledge, and use personal experience as a resource. The largest difference between adult students and traditional age learners is that the learner role comes secondary to the multiple other roles that adults play within their career and personal lives (Kuhne, 2017). Since an adult learner is typically middle age and more significantly working a full time job, there are many competing commitments while earning a degree. These types of students may have family responsibilities, longer commute times and less peer support than the traditional student (Cohen & Greenberg, 2011, p.102). Due to this, adult students often have conflicting and demanding schedules drawing up more time and energy. These factors and characteristics that are unique to the adult learner demographic are imperative to include in the curriculum, structure and development of master degree programs as well as the marketing message and strategy.

Research-based Personas

Due to the fact that the target market is comprised of individuals located across various stages of the life cycle, a set of four “personas”, fictional representations rooted in behavioral data and knowledge of the audience, was created to represent and segment typical variations of the prospective adult learner. By pinpointing demographic variables (age range, household income, location, etc.) as well as psychographic variables (goals, challenges, values, etc.), comprehensive profiles of these individuals were created to inform and guide further research. Based on previous research, the four personas that were formed were: the *Mid-Life Escapee*, the *Tech Careerist*, the *Late Starter Student*, and the *Business-Grower* (see Appendix for detailed chart of personas).

The *Mid-Life Escapee* is likely a middle-aged woman who has had only the basic-level of formal education and is currently in a low-level job with limited upward mobility. Despite having little-to-no free time and making a decent living, she feels dissatisfied in her profession and is ultimately seeking ways to transition into a more fulfilling career with higher pay. The *Tech Careerist* is a man in his prime, making an above-average salary at a mid-level position in a quickly changing industry (i.e. tech). Highly ambitious, he aims to continuously improve his proficiencies and keep updated on the latest industry trends by acquiring new and relevant qualifications and skills that would benefit his career and prevent him from becoming “obsolete” in the workplace. The *Late Starter Student* is a fairly recent graduate who has been in an entry-level position for a couple years and is looking to resume formal education in the most cost-effective and convenient way. Lastly, the *Business-Grower* is a mid-level careerist whose main focus is to grow an independently owned enterprise, start-up, or company. This individual

has never ventured into serious business but is ready and willing to learn tangible strategies that directly translate into an advantage when it comes to business-ownership and growth. These profiles serve to provide a more detailed background into potential adult learner archetypes—acting as good basis for specifying a particular audience to appeal to and future recommendations for messaging or events of interest.

With these unique characteristics in mind, there is specific criteria that adult students look for in a master degree program that aid in their competing commitments and challenges. Flexibility is the most common need for adult learners since more than two-thirds are part time students due to their full time jobs (Brown, n.d.). With demanding schedules, adult students desire flexibility in scheduling with options of both evening and/or weekend classes. These potential adult students also may have supplementary credits or certificates from other programs and training. Having the ability to transfer these credits into their intended degree, is effective in providing students an easier schedule and accelerated program. These flexible factors in a degree program allow adult students to see the achievable end goal in the quickest and most effective route possible. With this flexibility, adult learners also desire a relationship based culture, specifically an ability for their demanding schedule to be understood by advisors and faculty. An advisor that is able to guide and aid the demands of returning to school is extremely beneficial and desirable for an adult student (Fusch, 2017).

While past research indicates the basic educational needs of adult learners and typical characteristics of the demographic, there are counterarguments and gaps in the research. According to data collected, there is a need within the workforce for more credentialed workers but it is unclear whether or not there is an internal and personal desire for adult learners to return

to their studies. As researched and previously stated, a working adult has multiple other demands and competing roles while earning a master's degree. It is unclear the percentage of working professionals that actually seek and desire a full degree rather than simply a certificate or skill-based training. In fact, Bill Gates' "Gates Foundation," argues and encourages employers to hire and look for employees with skill based training over college degrees to effectively fill positions. The Gates Foundation believes that using this hiring method allows for employers to find the right person "who needs less training and are less likely to quit" (Bort, 2013). This idea provides a counterargument and competing research for how the workforce needs to be educated. It is also unclear the number of current adult learners earning a master's degree in the United States. While there is significant data surrounding adult students achieving a bachelor's degree, there is limited data and statistics about adult master students.

Industry Trends

Within the industry of continuing education, adult learning and professional development, three key contemporary trends stand out and define success within the field, namely—direct relevance to the working world, applicability for the burgeoning tech-age, and accommodation to individuals' specific wants, needs, and goals.

Practical Education For The Working World

One of the primary motivators for adult learners is upward mobility—the ability to acquire a higher-level profession in a rapidly changing work environment. The development of a more qualified workforce is also valuable to state and local employers (Hanover Research, 2014). Thus, a contemporary trend in adult education involves connecting the academic program to specific employment aims or skills. At this stage, the institution's career services must be

proactive and efficient. This entails potentially developing employer networks or partnerships with companies and strategizing how the curriculum could translate to tangible professional skills (Horn et al., 2016). Such a collaboration could then potentially translate into employer-provided capstones, required internships, or custom employee training programs. Moreover, these institution-corporation partnerships can also combine strengths from both sides to further the industry of continuing education as a whole, wherein universities bring domain expertise, established faculty members, facilities, and a respected brand, while private partners bring best-in-class market research, advertising, sales, technology-driven instructional models, and analytics.

More specifically, a trend in continuing education for working individuals is to provide more professional benefits and incentives while lessening the requirements, limitations, and time constraints. Bridge programs, for instance, combine basic skills training with vocational preparation. Establishing career pathways, on the other hand, aim to break long programs into a sequence of smaller, more readily achievable pieces or rewards—a process known as “chunking”, which provides adult learners with employer-recognized credentials along the course of their education (Hanover Research, 2014). Contextualized instruction, a combination of skill programs and live career training at work sites over generic content, as well as competency-based models, advancement based off of concept mastery or skill rather than time (i.e. certificate programs), are also imperative in ensuring that continuing education has more practicality within the workplace (Horn et al., 2016). “Competency-based education identifies explicit learning outcomes when it comes to knowledge and the application of that knowledge. They include measurable learning objectives that empower students” (Weise, 2014).

Modernized Education For The Digital Age

As the digital revolution continues to accelerate, technology will continue to progressively promote new and exciting opportunities to shape learning experiences and achieve learning goals. In order to stay relevant in the digital age, continuing education has had to adapt to new ways of learning, and maximize the capacities of 21st century advancements and trends in technology. “Microlearning” is one such trend comprised of more informal experiences that last anywhere from a few seconds (the time it takes to answer an online quiz question) to 20 minutes (the time it takes to watch an instructional video) (Harman, 2018). Fueled by the rise of MOOCs, adult learning has been increasingly driven by microlearning. “Three-quarters of organizations viewed MOOCs very positively or positively (73 percent) with respect to their potential influence in hiring decisions for job applicants who had taken job-related MOOCs” (Radford et al., 2014). These virtual classrooms challenge the stagnancy that defines typical educational institutions and have also approached the traditional learning “environment” and ideal learning “schedule” with considerably more flexibility and potential— ideal for the average adult learner. “Online competency-based providers can easily and cost-effectively stack together modules for various and emergent disciplines” (Weise, 2014). The trend of on-demand learning, for instance, offers rolling registration (continuous program start dates), self-paced schedules, as well as course availability or support at anytime, from anywhere (Horn et al., 2016). These online courses and meetings utilize the capacities of various platforms to ensure connectivity on-the-go and to allow for learning opportunities to occur at the most convenient times, giving adult learners the flexibility to determine the best time for participation (Gaymer, n.d.).

Personalized Education For Learner Variants

Educational institutions that offer opportunities for continuing education are coming to realize that a one-size-fits-all approach for learning is unworkable, especially given the varied intentions, age range, socioeconomic status, and stages in the life cycle that potential adult learners may fall within. Being at a more advanced stage within the life cycle, adult learners often shoulder multi-level responsibilities which make education difficult to prioritize and which potentially compromise learning outcomes. Thus, the trend of personalized learning—the ability to create a flexible, customized, self-paced approach to learning that fits the individual’s unique needs, has become a core value-driver. These flexible programs, which accommodate busy schedules and accept the fact that personal obligations might obstruct the learning process, are imperative in creating the necessary work-arounds. In part, this includes topical adult learning communities, which integrates current events, especially with local connections or community relevance, into the curriculum. As a general trend, many adults who are eligible to enroll fail to do so, or fail to complete a course of study due to these busy schedules or family duties. Other barriers may include programs being overly drawn-out and overly theoretical, leading these result-oriented students to simply lose motivation after failing to see concrete economic gains (Hanover Research, 2014). Due to this, participation in adult learning programs can be sporadic. Ergo, any strategy that promotes accelerated learning or compressed learning (i.e. shortened courses where material is presented in a more intensive “boot camp” format) then becomes highly valuable.

Institutions should also be mindful of being more inclusive of various groups and demographics. Intergenerational learning, which combines aspects of mentorship with modern,

new-age perspectives is seen as highly valuable as is expanding creative financing options for continuing education. Institutions have begun to offer differentiated pricing and discount strategies such as paying per module instead of an entire course, or tuition-matching programs which can double the financial contribution of an employer (Horn et al., 2016). Increasing program access for lower-income students through these employer-provided educational assistance programs or state and federal aid serves as a strategy to broaden the audience of adult learners and generate greater interest in continuing education as a whole (Horn et al., 2016). By expanding such options, educational institutions serve to lower the barriers of entry into these adult-learning programs for a broader range of individuals, further driving enrollment growth and reputability for the university.

Comparison to Competition

There are a total of nine universities located in the Worcester area, most of which offer programs for the adult learner population, including certificate programs, undergraduate programs, and graduate programs. According to School of Professional Studies' marketing plan 2017-18 (see Appendix), Clark University has four competitors: Brandeis University, Assumption College, Worcester Polytechnic Institute (WPI) and Southern New Hampshire University (SNHU) (Probeck, 2017). Worcester Polytechnic Institute (WPI) and Assumption College are the two main competitors of Clark University, also located in the Worcester area. Worcester Polytechnic Institute offers fully online graduate programs including 11 certificate degrees and 13 master degrees for adult learners, providing flexibility for adult students in terms of degrees and online offerings. As mentioned previously, adult learners not only look for flexibility within graduate programs but also affordability. Assumption College offers master

level courses at a rate of \$1,113.00 per class, with an additional alumni and spouse tuition discount of 50% (Assumption College Financial Aid Information, 2017). In comparison, an adult learner will pay \$2,750.00 per class at Clark University, with 30% to 40% tuition discount for alumni, spouse, and/or partner (Clark University Tuition & Financial Assistance, 2017). With the competitor data in mind, it is imperative to market the differential qualities of the School of Professional Studies, specifically the continuous adaptations made to the SPS curriculum in relation to the changing workplace as well as the emphasis on practical experience and career development (Probeck, 2017).

Past Practices

There are many past practices that the School of Professional Studies has used to reach the adult learner demographic and market the program's differentiated factors. SPS has partnered with professional organizations and businesses in the Worcester area, specifically the *Worcester Chamber of Commerce, Inc.*, *Association of Training and Development*, *Economic Forecast Forum* and so on (Probeck, 2017). In addition, SPS has also established a Workplace Seminar Series, which aims to partner with local businesses in Worcester to host seminars focusing on workplace dynamics, personal development and skill building. Through these seminars, SPS has established a relationship with Unum, an insurance company located in Worcester as well as several departments within the City of Worcester (Probeck, 2017). The School of Professional Studies also conducted several other campaigns, such as informational sessions and digital campaigns through social media to reach this demographic. According to the "2015 Adult Learner Marketing and Recruitment Practices Benchmark Report for Undergraduate and Graduate Programs," online chats, purchasing names of prospective students from list vendors,

print media advertisements (newspaper, magazines, etc.), social media (Facebook, Twitter, LinkedIn, etc.), and trade show exhibits are the top five least-effective practices for generating inquiries (Ru alo Noel Levitz, 2015). From our research of the demographic as well as the past practices, we developed a strategy to learn more about potential partnerships with organizations in Central Massachusetts, in order for SPS to effectively leverage from these opportunities.

III. Methods

Design and Materials

The design and data for this study began with the narrowing of our geographic scope of potential organizations. We decided to focus on organizations in Central Massachusetts, with an initial focus on Worcester. Through this process we gathered information on the organizations which we felt SPS could have the potential to form future partnerships with. The main research method that we used to get our information was phone-based interviews, resulting in essential primary research. Depending on the preference of our contacts, we also held email and in-person interviews.

Before conducting the dialogue with organizations, we produced a phone-call script to maintain consistency in our gathered information (see Appendix). By standardizing an interview questionnaire, it was easier for us to collect information but also allowed us to compare data afterwards. Through the information gathering stage, we also made sure to explain the purpose and background of our project. This step was important because we had to ensure trust between our contacts. Below are the questions to which we asked each and every organization contact:

1. What is your organization about?
 - a. Why does your organization exist? / What is the goal of the organization?
2. What type of person is the average member / attendee of the organization's events?
3. How many members / attendees?
 - a. Where do they hail from?
 - b. What stage of their lives would you say they are at?
4. How do you decide what kind of events to have? Is it based off members' interests?

5. What are your events like?
6. Where do you have events?
7. Do you have regular meetings aside from the events? / How often?
8. Can you speak more to the professional development component of your organization?

According to the script, Question 1 is essential to gathering basic information about the organization. In order to clarify that the goal of the organization reached the adult learner demographic to some capacity. Question 2 aimed at focusing the interviewee's response on the purpose of their organization. For example, some organizations focused primarily on professional engagement through social and networking events, such as *Marlborough Regional Chamber of Commerce*. Other organizations focused on specific high-level professional development for a smaller demographic, such as *The Venture Forum*. It was vital for us to fully understand the varying goals and scopes of the organizations. Questions 3 and 4 focused on the type of professionals that participate in the events in order to fully understand the specific segment of the adult learner population each organization reached. Questions 5, 6, and 7 focused on determining the events typically held in the organization. In order to judge whether or not an organization would be a worthwhile partnership, we asked questions that aimed at examining exactly what type of events/conferences/seminars the organization regularly held. While some organizations, like the *Worcester Chamber of Commerce, Inc.*, held over 200 annual events other organizations were just starting to gather new memberships and events. There were many advantages of using the interview process as a way of gathering research. In order to get the most meaningful and insightful responses, our list of questions in addition to our general conversation

about adult learners aided the interview process and allowed us to gather primary research used for our analysis.

Ethical Concerns

Our research process consisted primarily of informal conversations which required ethical considerations when speaking to an interviewee. Before we began collecting information, we considered how to best explain the purpose of our research and structure the dialogue. We also wanted to create a positive experience through our conversations with the interviewee. In order to do so, we informed the interviewee of the goal and purpose of the conversation yet ensured the contact that our specific conversation would not directly lead to implementation. With a combination of our script and a detailed explanation of our purpose, we generated trust between researcher and interviewee, in essence creating consent between the two parties.

When we collected data from respondents, we made sure to create comfortable environments, in order to not offend our interviewee in any way. In order to avoid any opportunity for strong ethical concerns to arise we tailored our conversations primarily towards the script. Researcher bias in the framing of questions and the interpretation of responses is always possible. Moreover, in locating organizations around the Worcester area, we might add some unconscious bias when deciding which organizations that we want to connect with.

IV. Results and Reflection

Data Analysis and Findings

Organizational Analysis.

As per the client's request, an *Organizational Analysis*, an exhaustive list of 13 local organizations, was compiled (see Appendix). The list featured hubs of activity comprised of working individuals who ideally would be inclined to pursue further education, complete with contact information and general member profiles. The main purpose of the deliverable is to serve as a basic guide when it comes to forming affiliations or establishing partnerships with groups that match the archetypal adult learner personas.

Action Plan.

Furthermore, by creating a synthesized action plan in addition to this list, the research also intends to function as a more detailed catalog that streamlines the lengthy and ambiguous process of constructing tailor-made proposals for each type of organization. The plan clearly outlines the connections between the professional groups, the specific adult learner persona affiliated with such groups, and the potential activities, events, or academic topics that would appeal to this specific audience. This makes it possible to position the graduate program offerings in ways that are specifically tailored to each particular type of organization and its respective target audience. In doing so, a more evident link can be made between the course proper and the adult learner's desired outcome—be it a hard skill, a modern perspective, or a professional advantage—directly incentivizing individuals by providing tangible value and clear, attainable gain and, consequently, increasing the possibility of acquiring interest from prospective adult learners.

In an endeavor to generalize the findings, the selection of prospective partner groups allowed for further segmentation, and each was found to suitably filter into one of three categories: traditional, niche, or unconventional. Each general category could also be represented by one specific, local organization included on the comprehensive list. The “traditional” category, represented by the *Worcester Regional Chamber of Commerce, Inc.*, is comprised of multiple Regional Chambers, which generally serve as the established hubs of activity, often collaborating with multiple local organizations and professional networking groups within the general area. Chambers typically have existing relations with local universities yet often still lack hyper-specific messaging and tie-ins with relevant courses. On the other hand, organizations that serve very specific target audiences or member demographics fall within the “niche” category, represented by the *Young Professional Women’s Association*. Although generally composed of fewer individuals, these kinds of unique groups tend to have more definite goals and clearer expectations when it comes to events that have been specialized to fit their target demographic. Lastly, the “unconventional” category, represented by *Technocopia* includes atypical environments that potential adult learners may frequent, such as co-working spaces and public venues. These open locales, rarely prioritized by university recruitment efforts, are gaining traction in developing communities and are progressively being frequented by a number of prospective adult learners. Thus, these spaces serve as valuable, out-of-the-box sites for drawing interest in opportunities for continuing education. The research conducted spotlights these unconventional places as areas for potential expansion when it comes to offering partnerships and events to market the graduate programs and to ultimately source potential adult learners.

Mock Presentations.

For each organizational representative, a mock presentation including an event title, agenda and design takeaway was generated to act as an additional guide on how to approach each event specific to the unique category (see Appendix). The topics selected for the mock presentations relate to a specific course within the School of Professional Studies as well as draw on a tailored skill that is useful for the event demographic. For instance, as representative of the traditional group, we created a mock presentation for the *Worcester Chamber of Commerce, Inc.*, specifically their industry roundtable events geared toward business executives. Referring to the action plan, personas and demographic of the event, we selected the topic of change management and then established a presentation title and agenda with a skill-focus. Through the mock presentation titles, we wanted to emphasize the skill that a potential attendee would gain, the number of techniques to arrive at that skill and in what context. The presentation agenda and design takeaway were created in this same manner. The design takeaways are intended to be distributed to the attendees after an event concludes. The takeaway can be a point of reference, a step-by-step process that reminds the attendee of the skill they learned from the event. Each design takeaway also has a template that relates to the specific skill, such as a marketing persona template or change management template. The mock presentation including title, agenda and design takeaway were created in order to emphasize the importance of skill-focused material in every aspect of the presentation.

Salient Issues

There were a few major issues that we encountered while developing our project. The first issue is related to topic and term 'adult learners'. While we were able to conduct extensive

research and find adequate information on adult learners and how to reach them, it is important to recognize that the subject in terms of academic research was lacking. We were limited in finding specific journal articles about the subject, specifically adult learners obtaining their master's degree. Adult learner is also a term that applies to adults earning their bachelor's degree so it was vital to determine the difference in research. Moreover, due to the variations and multiple uses of the term "adult learner", it was also challenging to define the market and create segments within the expansive age range. Although these challenges of narrowing the market and limited research information, our data guided our project to be clear and concise.

We also faced roadblocks within our interactions and dialogue with some of the organizations we contacted. At times, it was difficult to find an effective way to communicate with a specific organization or a person within an organization. For example, in one instance, we were scheduled to call a contact but the meeting was postponed and then eventually cancelled. There were other times where a contact or means of contact for the organization was unclear. For example, some organizations did not have a telephone number or direct email address, instead prompting us to leave our information through a contact page on the website. Due to the lack of communication method for some organizations, gathering data sometimes was ineffective.

Reflection

As we look back at this semester-long effort, there are some key takeaways that we would like to share. This project has improved our ability to work with each other, as a team. For many of us, this was our first time conducting a group project that lasted the whole semester. Even though we had different individual schedules and responsibilities, we communicated effectively with each other and were able to meet regularly and work on multiple parts of the

project. Working as a team for the whole semester has improved our ability to listen to differing perspectives, share suggestions, and move towards a common goal. In addition to our collective efforts, time management was an additional learning process. As individuals, we had to balance our time between this project and other responsibilities such as classes, internships, and work. We each had to make sure to contribute to specific pieces of the project, such as research and reaching out to organizations. In perspective, the fact that each one of us was able to help and stay on track contributed to our ability to work as a group.

We also reflect that this project provided benefit in terms of our professional growth and development. Working as a team through the entire project process of research, data analysis, and strategy as well as maintaining client and advisor communication, mimic real-world workplace dynamics. We feel that collaborating in this way has given us knowledge and tools that are applicable to the real world. This project also allowed us to gain insight about Central Massachusetts in terms of the vast and diverse amount of professional organizations that exist in this community. For example, it was interesting to interact and learn about organizations that are more traditional in nature, such as the *Worcester Chamber of Commerce, Inc.*, as well as up-and-coming co-working spaces such as *Technocopia*. As students and as members of this community, we appreciated the opportunity to learn more about Worcester and professional organizations in the surrounding areas. In regards to our own professional development, learning about the organizations in Central Massachusetts also demonstrated that these organizations are potential options and opportunities that would benefit us upon graduation.

V. Summary Conclusion

After gathering research about professional organizations in Central Massachusetts, it was evident that there are many promising and workable partnerships that can potentially assist the School of Professional Studies in accessing the adult learner population. The value in each individual organization is rooted in the fact that each has a different purpose, reaching a unique segment of the larger population of potential adult learners, specifically working professionals who are at least 24 years of age. As seen in the *Organizational Analysis* (see Appendix) significant information was gathered for twelve organizations regarding the overall purpose, the number of attendees per event or total number of memberships, and the typical type of audience persona present at such events. From this data, a more detailed *Action Plan* (see Appendix) was also generated. This plan includes events the organization currently hosts, potential topics and messaging that would resonate with relevant adult learner personas, and, most importantly, direct tie-ins between these actionable measures and the courses offered within the School of Professional Studies' degree program. Establishing this clear correlation between the event and course topics is to provide event attendees a small glimpse into the School of Professional Studies course curriculum and peak their interest in the programs. By taking these deliverables from conceptualization to implementation, the Graduate Marketing Department of Clark University can identify local organizations connected to potential adult learner populations, can directly visualize actionable measures to leverage these organizational partnerships, and can use the knowledge base to serve as a foundation for fostering more organic connections in the future.

Messaging and Presenters

It is imperative that specific recommendations on approach and use of the action plan are illustrated. While some of the organizations outlined in the *Action Plan* host social events, the intention is to showcase and prioritize events that allow and foster personal partnerships through presentations and guest speaker opportunities. Due to this strong recommendation to focus on presentation-type events, we recommend sending “experts in the field” to the events, whether it be a SPS staff or faculty. By sending a SPS constituent, attendees will be able to meet and interact with faculty and staff that work in the day-to-day activities of the School of Professional Studies. Through organic and genuine dialogue, adults may be more invested in learning more about the program, sitting in or trying out a course, or visiting the campus and speaking with a staff member. Having these personal connections with SPS will allow potential adult learners to establish an instant relationship that can leverage and motivate them to apply to the program. Generating peer-relationships is an important component that many adult learners seek when deciding on a graduate program.

It is also important to send SPS staff or faculty because we recommend presentations to focus on skill building and relate directly to an SPS course. Through research, it was determined that adult learners seek skill-based learning versus theory-based. As working professionals in their field, adult learners wish to become proficient or learn a skill that will directly benefit them in their workplace. We suggest selecting presentations, workshops and speech topics that provide the audience with a tangible and valuable skill. When marketing these events, we recommend using event titles that are specific and detailed, illustrating the skill that the audience can obtain from attending the event. This recommendation is shown within our *Design Takeaways* (see

Appendix) in which we demonstrate the detailed event title that outlines the skill the audience will gain, the specific techniques to learn the skill and in what context. It is through this idea, we believe working professionals in the audience will become interested and invested in learning more skills to add to their resume, thus learning more about the program. With a strong focus on skill-based presentations, we believe the School of Professional Studies will seek highly effective and reliable leads.

How to Prioritize

Within the *Organizational Analysis* (see Appendix), there is a span of small to large organizations with a range of members and attendees, it is important to note that both size organizations provide unique yet important opportunities. Smaller organizations such as the *Wachusett Chamber of Commerce*, *Adelante Worcester*, or *Center for Women and Enterprise*, provide intimate occasions for attendees to ask questions and/or have individual conversations about the event topic or degree programs. Through utilizing the three distinctive categories of organizations—traditional, niche, and unconventional, the client can easily assess the organizational divisions within the Central Massachusetts market and build off suggestions presented in this project to generate a more in-depth strategy and approach for each category. It would also be beneficial for the client to be able to generalize the organizations in order to determine and document the best practices of achieving success and reaching actionable leads through potential students.

General Takeaways

Through our research and analysis of the adult learner population, we discovered general reflections leading to recommendations that apply to the graduate programs at large. It is evident

that a stress on skill-based learning is priority and necessary to attract the working professional population. As discussed in the literature review, adult learners have many competing commitments due to their age and stage of life. Due to this, they are motivated by a specific need pertaining to a skill that will provide them with a direct result in their career. With this in mind, we recommend having a multitude of courses that are skill-driven over theory based. This can be achieved with advising that drives adult students toward a more skill focused track as well as tailoring the courses to fit their specific need and reason for obtaining the degree. As previously discussed, adult students seek a peer relationship which can be utilized during advising sessions with faculty. Adult learners desire a relationship where they are understood, a peer who comprehends and supports the many challenges and commitments that they face while working and obtaining a degree. Additional support for adult learners can be in the form of child care services and/or transportation, providing adult learners with support and a solution to their other commitments.

While we were able to gather research on the current adult learner population at large, it would be useful to continue collecting quantitative data on the population specific to the School of Professional Studies. As discussed in the research, the adult learner demographic is a diverse group with a large range of ages, occupations, values, needs and so on. Although it may be simple to assess the current SPS population and assume the *persona* type that each adult student falls into, we recommend gathering live data on the current adult learner population within SPS. With concrete data, SPS can provide specific solutions to the needs of the population and constantly have data to govern their decisions. Through annual data collection, SPS will have information to reflect back on, allowing staff to analyze their strategies and changes in real time.

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Appendix

Appendix A - Personas

Persona 1 – Mid-life Escapee

Demographics	
Age	45-55
Gender	Female
Salary / household income	50,000
Location: urban / suburban / rural	Suburban
Education	GED / Community College
Family	Married, 1-2 children
Job title	Low-level job with limited upward mobility
Goals and challenges	
Primary goal	<ul style="list-style-type: none"> · Seeking more fulfilling career in different field
Secondary goal	<ul style="list-style-type: none"> · Looking to gain more relevant skills · Want a job with higher pay / for children
How you help achieve these goals	<ul style="list-style-type: none"> · Offer courses in modern skills that directly lead to career opportunities in better fields
Primary challenge	<ul style="list-style-type: none"> · Unhappy, or unfulfilled in current role · College courses are expensive / time-consuming
Secondary challenge	<ul style="list-style-type: none"> · Feel like they could be doing “more”
How you help solve these problems	<ul style="list-style-type: none"> · Messaging focus on people who moved from lower-level jobs to higher-level careers · Statistics on how useful courses / skills are in the industry · Stress flexibility and accommodating
Values / fears	
Primary values	<ul style="list-style-type: none"> · Personal fulfillment · Making something of self

ADULT LEARNERS: TARGETED MARKETING

Common objections during sales process	<ul style="list-style-type: none">· Currently making decent money in job· No time
Misc.	
<i>Hobbies</i>	Family-friendly activities and travel
<i>Computer literacy</i>	Below average, doesn't know much about LinkedIn
<i>Where they get their news</i>	TV

ADULT LEARNERS: TARGETED MARKETING

Persona 2 – Tech Careerist

Demographics	
Age	30 - 40
Gender	Male
Salary / household income	90,000
Location: urban / suburban / rural	Urban
Education	Bachelor's Degree + Master's Degree
Family	In a serious relationship
Job title	Mid-level job in quickly changing industry (i.e. tech)
Goals and challenges	
Primary goal	· Seeking to upskill or gain new qualifications in career
Secondary goal	· Wants to get promoted
How you help achieve these goals	· Target specific industries and find skills employees most want to learn
Primary challenge	· Starting to feel "left behind"
Secondary challenge	· Constantly wants to better self
How you help solve these problems	· Upskill messaging · Stress quality of courses
Values / fears	
Primary values	· Personal fulfillment · Making something of self
Common objections during sales process	· Complacent in job · Courses are not valuable enough
Misc.	
<i>Hobbies</i>	Listening to podcasts, taking online courses, networking, reading business literature
<i>Computer literacy</i>	Highly proficient
<i>Where they get their news</i>	Online publications

ADULT LEARNERS: TARGETED MARKETING

Persona 3 – Late Starter Student

Demographics	
Age	25 - 35
Gender	Male
Salary / household income	45,000
Location: urban / suburban / rural	Urban
Education	Bachelor's Degree
Family	Single
Job title	Recent Graduate or Entry-level job
Goals and challenges	
Primary goal	· Finally start with graduate-level education
Secondary goal	· Focus on academic area that is highly relevant to the job market
How you help achieve these goals	· Communicate most relevant courses
Primary challenge	· May have taken time away from pursuing education perhaps due to family reasons, or to travel, but have chosen to re-enter through traditional channels
Secondary challenge	· Could not afford graduate education right away, took a couple years off to work · Unsure about going back after 3+ years of being out of school
How you help solve these problems	· Appeasing uncertainty of coming back
Values / fears	
Primary values	· Resuming education
Common objections	· Want convenient, high quality education
Misc.	
<i>Hobbies</i>	Exploring cities, attending less mainstream local events
<i>Computer literacy</i>	Above Average

ADULT LEARNERS: TARGETED MARKETING

<i>Where they get their news</i>	Online publications
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ADULT LEARNERS: TARGETED MARKETING

Persona 4 – Business-Grower

Demographics	
Age	20 - 40
Gender	Female
Salary / household income	75,000
Location: urban / suburban / rural	Urban
Education	Bachelor's Degree, Master's Degree
Family	Newly-wed / Newborn
Job title	Mid-level in career
Goals and challenges	
Primary goal	· Grow their independently-owned business
Secondary goal	· Become a more business-savvy individual (for future job goals or business school goals)
How you help achieve these goals	· Provide tangible strategies relating to business-ownership and growth · Use credibility of known experts teaching the courses
Primary challenge	· Have a lot of other (cheaper, more convenient) methods to learn about business but may not have the time to self-teach
Secondary challenge	· Has never ventured into serious business before but willing to learn
How you help solve these problems	· Make events / courses seem accessible to average people (do not need to be experts in business)
Values / fears	
Primary values	· Entrepreneurial, business-savvy
Common objections	· Want actual solid strategies over theoretical mumbo jumbo
Misc.	
<i>Hobbies</i>	Spending time with family, micro-learning, attending topical talks / conferences

ADULT LEARNERS: TARGETED MARKETING

<i>Computer literacy</i>	Highly Proficient
<i>Where they get their news</i>	NYT, Wall Street Journal, The Economist, TIME

ADULT LEARNERS: TARGETED MARKETING

Appendix B - SPS Current Marketing Plan

School of Professional Studies (SPS) Marketing Plan 2017-18 (Probeck, 2017)

OVERALL GOALS

1. Increase inquiries, applications, and enrollment
 - Focus on domestic, non-traditional (early stage to mid-level) students who have been in the workforce and are looking for a different career path to advance
 - ROI - high quality programs at a competitive cost
 - Continue to enroll quality, International Students (90% of full-time students are international)
2. Build brand awareness focusing on quality of program and professors, university reputation, and flexibility (online courses)
 - Shorter path for degree completion
 - Career advancement
 - Certificate programs available (IT job ready)
3. Leverage workforce training and certificate programs
4. Recruit stronger academic student profile
5. Connect with local companies as a pipeline for employees to participate
 - a. Workplace seminars are held at Unum, City of Worcester, Family Health Center, Holy Cross

PROGRAMS

Master in Public Administration (MPA)
MS in Information Technology (MSIT)
MS in Professional Communication (MSPC)

COMPETITORS

Brandeis, Assumption, WPI, SNHU

MS Information Technology: Fordham and Bentley

MS Professional Communication: NYU, Syracuse, Fordham, George Washington U., American University, Univ. of Florida

MS Public Administration: Univ. of Miami, SUNY Stonybrook, Univ. of Pittsburgh, Fordham, George Washington U., Stevens Institute of Technology

Aspirational schools are George Washington U. and Arizona State U., UMass Lowell, NYU

UNIQUE DIFFERENTIATORS

- Emphasize practical experiences and career development—reputation among employers for excellent professional preparation.
- Flexible and innovative work environment – complete a degree on their schedule while balancing work, life, and family.
- SPS adapts programs to changing needs of employers and organizations to meet demands of the job market

ADULT LEARNERS: TARGETED MARKETING

- SPS Programs combine domain knowledge and expertise with the insight into communications skills, workplace dynamics, corporate social responsibility and applied research employers seek in their next generation of leaders.

GEOGRAPHIC REGIONS – ENROLLED STUDENTS

U.S.

Over the past ten years students have hailed from these top states:

Massachusetts – 721
 Connecticut – 53 students
 New York – 39 students
 New Hampshire – 25 students
 Maine – 23 students
 California – 13 students
 Rhode Island – 13 students
 New Jersey - 12

International

Over the past ten years students have hailed from these top countries:

China – 371 students
 India - 72
 Ghana – 14 students

GRADUATE ENROLLMENT SUMMARY (Last 12 months)

PROGRAM	INQUIRIES	APPLICATIONS	ADMITS	ENROLLED
MS Information Technology	151	93	73	33
MS Professional Communication	117	90	63	17
Master in Public Administration	98	61	48	21

**2017 spring, summer, and fall admitted and deposited Clark Graduate Students. See attached sheet for 4-year Fall admissions history by enterprise.*

PRIORITIES FOR DIGITAL AND MEDIA CAMPAIGN FOR FY17-18

Below highlights the programs we would like to prioritize for the upcoming year's campaign as well as target demographics:

PROGRAM	Geographic Region (States & Countries to target by program)	Age range (target by program)
SPS (overall awareness) 25%	40 miles radius from Clark - Northern RI, North of Hartford, Worcester County, East of Amherst.	23-45
MSIT 25%	40 miles radius from Clark - Northern RI, North of Hartford, Worcester County, East of Amherst.	23-45
MPA 25%	40 miles radius from Clark - Northern RI, North of Hartford, Worcester County, East of Amherst.	23-45
MSPC 25%	40 miles radius from Clark - Northern RI, North of Hartford, Worcester County, East of Amherst.	23-45

ADULT LEARNERS: TARGETED MARKETING

- We expect fairly consistent (range of 20%-30%) growth across all three Degree programs.
- SPS re-branding is critical to build awareness plus we anticipate the messaging will support all three programs
- Wider than discussed age range reflects uniqueness of individual programs as well as new offerings. For example, MSPC typically will attract recent grads. The MSIT Job Ready program will target people 1 -5 years removed from graduations

TOP FEEDER UNDERGRADUATE COLLEGES AND UNIVERSITIES

MSIT (mostly international schools): Anna University, Beijing University of Posts and Telecommunications, Federal University of Technology, Oxford College of Engineering and Management, Shandong University of Science and Technology, Umass-Boston, Umass-Amherst, Holy Cross, WPI

MPA: Anna Maria College, Clark University, Purdue University, Quinsigamond Community College, Shandong University of Science and Technology, Springfield College, Univ. of CA-Irvine, UNH, Worcester State U.

MSPC (mostly international schools): Beijing International Studies University, Communication University of China, United International College, Umass-Amherst, Worcester State U. , Purdue, Regis College, Mt. Wachusett Community College

FUTURE GRADUATE ENROLLMENT GOALS

Increase enrollment in all programs, most importantly increase part-time graduate enrollment. Graduate enrollment goals for 2017/2018 per program:

PROGRAM	ENROLLED STUDENTS (F17)
MS Information Technology	78
MS Professional Communication	56
Master in Public Administration	64

By the end 2019 SPS has established a goal of securing 100 additional students across all Programs.

UNDERGRADUATE DEGREES/FIELDS OF STUDY

SPS students have BS degrees in the following areas:

- Bachelor of Arts- 17
- Bachelor of Computing or Computer Engineering- 7
- Bachelor of Science- 12
- Bachelor of Economics- 10
- Bachelor of Management- 5

**these are not the only degrees received, just the most prevalent.*

Majors

- Communications- 2
- Computer science- 7
- Economics- 2
- Finance- 7
- Management and Information Systems- 6
- Political Science- 2

ADULT LEARNERS: TARGETED MARKETING

Full list of Majors

Accounting
Advertising
Business Administration
Business Information Technology
Chemistry
Civil Engineering
Communications
Computer Science
Computers and Applications Software
Economics
Electronics
Elementary Education
Engineering
English
Finance
Geography
Graphic Art
International Relations
Law
Management
Management and Information Systems
Mathematics
Mechanical Engineering
Nutrition
Physics
Political Science
Psychology
Public Administration
Secondary Education
Sociology

AGE

46.5% of students directly from undergrad (ages 21-23)
42% of students are in early-mid rang of their careers (ages 24-36)
11% of students are career changes (age 40+)

YEARS OF WORK EXPERIENCE (range 0-30 yrs)

0/Blank: 36
1 year: 8
5 years: 6
20 years: 3

**highest concentration of numbers*

WHY STUDENTS ENROLLED ELSEWHERE OVER CLARK

ADULT LEARNERS: TARGETED MARKETING

- Curriculum is more in line with career goals than Clark's – 24.7%
- Program and/or University Reputation is stronger than Clark's – 18.6%
- Location – 13.8%
- Scholarship funding – 12.9%

** this data is based on an overall survey for all graduate programs. This data is not program specific.*

DATES AND DEADLINES

Semesters: Fall (August 28), Spring (January 16), Summer (May 21)

Rolling admissions for all three MS programs. International students need to apply at least two months before the semester to ensure time to process immigration paperwork.

GRADUATE ADMISSIONS EVENTS | TARGET AUDIENCE

Info Sessions at Clark – Domestic & International

20+ U.S. Colleges (mostly virtual webinars) - Domestic

On Campus Course Previews - Domestic & International

City of Worcester – Workplace Seminar (ongoing relationship)

Unum – Workplace Seminar (ongoing relationship)

EVENTS ATTENDED PROMOTING ALL GRAD PROGRAMS

Mass. Municipal Expo – Massachusetts

Economic Forecast Forum – Domestic

Worcester Chamber of Commerce - Massachusetts

Association of Training and Development – New England

Worcester Women's Leadership Conference - Massachusetts

PAST CAMPAIGNS

Digital Campaign with Carnegie Communications (search, remarketing, display, FB) – 3 months / \$27k

Listing on Peterson's with profile pages focused on MS Professional Comm, MS Public Administration, and MS Information Technology. (lead generation)

ADULT LEARNERS: TARGETED MARKETING

Appendix C - Script for Primary Research

- **Intro:** Hi, my name is YOUR NAME. I am a graduate student at Clark University doing a thesis project on professional organizations in AREA (i.e. Worcester or the MetroWest area). I'm in the information-gathering stage of my research and I was just wondering if I could have a brief conversation about NAME OF ORG.
- Great. Who am I speaking with?
- **Explanation:** Just for a little more background, I'm specifically interested in what drives certain individuals/professionals choose to pursue continuing education, whether that's getting their Master's or taking skills workshops.
- Thought to look into professional development organizations such as NAME OF ORG, to get more insight into the kind of person who would match this persona and the events / groups they would be interested in.

Questions:

What is your organization about?

- Why does your organization exist? / What is the goal of the organization?

What type of person is the average member / attendee the organization's events?

- How many members (#) / attendees?
- Where do they hail from?
- What stage of their lives would you say they are at?

How do you decide what kind of events to have? Is it based off members' interests?

- What are your events like?
- Where do you have events?

Do you have regular meetings aside from the events? / How often?

Can you speak more to the professional development component of the NAME OF ORG?

Knowing the members and the types of events that have already been done, what kind of professional events / experiences would you say are most appealing?

- Or would be beneficial to your employees and organization?

ADULT LEARNERS: TARGETED MARKETING

Appendix D - Organizational Analysis and Action Plan

TRADITIONAL





WORCESTER CHAMBER OF COMMERCE

Worcester, MA

Karen Pelletier, VP of Operations

(508) 753-2924 | kpelletier@worcesterchamber.org

<https://www.worcesterchamber.org>

NUMBER OF ATTENDEES / MEMBERS

- 2300 business members / attendance varies depending on the event

INTERESTS / PURPOSE OF ORGANIZATION

- They host over 200 events a year for specific industries or different levels of personnel and have many sponsorship opportunities

TYPE OF PERSON

- Range of attendees - younger professionals, middle managers, executives in the Worcester area

EVENT DETAILS

- Depending on event: seminars attract younger professionals, industry roundtable events attract managerial employees (between 30 - 100 people attend), and breakfast meetings attract more executives; "Business After Hours" events attract 160 - 200 people; Women's Leadership Conference has many opportunities - exhibitor sponsor will attract 700 women, workshop sponsor will attract 100 women

ADDITIONAL NOTES

- They have a member e-mail list over 10,000, and USP mailing list over 4,900 | Corporate sponsorship = \$1,000 a year, gaining access to their mailing list of all members (which is over 4,900 people in the area) and free admission to more events

USE OF PARTNERSHIP

- Present / Guest speak at a Seminar Series
- Sponsor and present at an industry roundtable event (i.e. healthcare, diverse professionals, workforce talent, government)
- Both events select "timely topics" and topics are selected but also can be proposed by an expert in that field

TOPIC (MESSAGING)

- Seminar topics are geared towards younger professionals (i.e. social media success, grant writing, marketing)
- *5 ways that social media can improve and enhance your personal brand*
- *How to utilize story-telling in grant writing proposals*
- Industry Roundtable events are topics that are more appealing to managerial employees (i.e. workforce talent, healthcare, diverse professionals, government, legislative policy)
- *How to implement an information security system within a corporate setting*
- *How to re-evaluate the way change management is practiced in your organization*

RELATED COURSE MATERIAL

- MSPC 3050: Social Media Marketing and Communication
- MSPC 3690: Organizational Conflict
- MPA 3020: Fundraising and Grant Writing
- MSIT3820: Business Intelligence
- MPA3170: Change Management
- MSIT3210: Introduction to New Media Technologies
- MSIT3110: Cyber Security Fundamentals
- MPA 3110: Applied GIS For Decision Makers
- MPA 3740: Strategic Management for Public and Nonprofit Organizations
- MSPC 3620: Cultural Diversity and Intercultural Communication

PROGRAM

- MPA, MSPC, MSIT

SPECIFIC DEMOGRAPHIC

- Young Professionals working in the Worcester Area trying to network and learn new skills to improve their marketability

- Current business owners and/or managerial employees from local businesses aiming to learn and discuss current trends and challenges with other community business members

PERSONA MATCH

- Tech Careerist, Business-Grower, Late Starter Student

WACHUSSET AREA CHAMBER OF COMMERCE

Boylston, Holden, Paxton, Princeton, Rutland, Sterling, West Boylston
Jen Stanovich, Executive Director
(508) 829-9220 | info@wachusettareachamber.org
<https://wachusettareachamber.org>

NUMBER OF ATTENDEES / MEMBERS

- 178 members / attendance varies between 30-70

INTERESTS / PURPOSE OF ORGANIZATION

- Aims to provide resources, networking opportunities and business development discussions to their community

TYPE OF PERSON

- Members are mainly small business owners from the Boylston, Holden, Paxton, Princeton, Rutland, Sterling and West Boylston areas

EVENT DETAILS

- Kind of events: Business development discussions (occur 4 times a year) on topics that relate to small business owners - recruiting / retaining / health insurance. Has had partnerships with surrounding colleges such as Anna Maria (not anymore)

ADDITIONAL NOTES

- Corporate sponsor is \$1000, standard membership is \$295 | Current Partnerships include local high schools and municipalities

USE OF PARTNERSHIP

- Present at one of their Business Development Discussions

TOPIC (MESSAGING)

- Topics that relate to small business owners and municipalities

- *How to use social media as a platform for storytelling and networking*
- *How to balance the needs of political leaders and public interest*
- *How to create an empowered workforce that aligns to your vision*

RELATED COURSE MATERIAL

- MPA 3170: Change Management
- MPA 3550: Politics and Public Management
- MSPC 3050: Social Media Marketing and Communication
- MPA 3740: Strategic Management for Public and Nonprofit Organizations

PROGRAM

- MPA, MSPC

SPECIFIC DEMOGRAPHIC

- Small business owners who are trying to grow their business, make local connections and hire new people

PERSONA MATCH

- Business-Grower

Westborough, MA
Jane Williams, Member Support
(508) 836-4444 | JaneW@CorridorNine.org
<http://corridornine.org>

NUMBER OF ATTENDEES / MEMBERS

- Attendance varies between 100-150.

INTERESTS / PURPOSE OF ORGANIZATION

- Organization aims to help local businesses connect with new talent, network with other community members/businesses and aims to establish a sense of community involvement.

TYPE OF PERSON

- Members are typically small business owner between the ages of 40-60 from Westborough, Southborough, Shrewsbury, Grafton, and Northborough. Also has young professional group, age ranging from 21- 40.

EVENT DETAILS

- Kind of events: business development workshops (3 times a year), breakfast meetings, after hour social events, guest speaker and networking events.

USE OF PARTNERSHIP

- Act as host for one of their workshop events - occurs 3 times a year (i.e. discussing website strategies)
- Speak at one of their speaking engagements on any relevant topic that relates to course material

TOPIC (MESSAGING)

- Topics that relate to small business owners and municipalities
- *4 techniques to use social media as a small / local business*

- *How to effectively balance the needs of political leaders and the broader public interest*

RELATED COURSE MATERIAL

- MPA 3170: Change Management
- MPA 3550: Politics and Public Management
- MSPC 3050: Social Media Marketing and Communication
- MPA 3740: Strategic Management for Public and Nonprofit Organizations

PROGRAM

- MPA, MSPC

SPECIFIC DEMOGRAPHIC

- Small business owners (age 40 - 60) looking to attract new talent and establish partnerships with local organizations

PERSONA MATCH

- Business-Grower

MARLBOROUGH REGIONAL CHAMBER OF COMMERCE (RISING YOUNG PROFESSIONALS)

Marlborough, MA

Linda Vissat, Founder of RYP

(508) 485-7746

<https://www.facebook.com/RisingYoungProfessionals/>

NUMBER OF ATTENDEES / MEMBERS

- Smaller local meetings get 10-30 people, bigger business events get 75+ people

INTERESTS / PURPOSE OF ORGANIZATION

- To connect members to do business with each other and socialize and network after work

TYPE OF PERSON

- Rising young professionals (age 21-40) who usually work for a larger organization (i.e. an insurance agent, a Mary Kay rep, small business-owner), have just gotten their first job, want to network on their own (with others like them in relevant businesses) but do it outside their workplace

EVENT DETAILS

- Kinds of events: professional development series (to get more information about different members), women-at-lunch, often have events in Metrowest Area, and joint events with different members (different chambers get together); had 144 events last year

USE OF PARTNERSHIP

- Professional development series
- Networking events

TOPIC (MESSAGING)

- Improve your competitiveness for a promotion
- Gain skills to succeed in a changing workplace
- Gain skills to open your own business

RELATED COURSE MATERIAL

- MPA3110: Applied GIS For Decision Makers
- MSIT3820: Business Intelligence
- MPA3170: Change Management
- MPA3930: Fundamentals of Business Analysis
- MPA 3740: Strategic Management for Public and Nonprofit Organizations

PROGRAM

- MPA, MSIT

SPECIFIC DEMOGRAPHIC

- Rising young professionals (age 21-40) who usually work for a larger organization (i.e. an insurance agent, a Mary Kay rep, small business-owner), have just gotten their first job.

PERSONA MATCH

- Late-Starter Student

WORKFORCE CENTRAL CAREER CENTER

Worcester, MA

Deb Baillargeon

(508) 799-1600

<http://workforcecentralma.org/>

NUMBER OF ATTENDEES / MEMBERS

- Last year, had about 1000-1200 people walk through the doors

INTERESTS / PURPOSE OF ORGANIZATION

- Two-fold: they work with job-seekers (prepping, getting resume ready, interview skills, labor market research), and they work with businesses (to place the job seekers, or to post open job positions)

TYPE OF PERSON

- Lower-income general job-seekers. Cater to a wide range of people, more on the lower-income side (18-94 age group, do some retraining in case companies are shut down, need to learn new skills, all different kinds of people, vets get priority)

EVENT DETAILS

- Kinds of events: Daily informational career-center seminars; Workshops (job-readiness workshops, resume-writing, interviewing, starting your own business, workforce re-entry, LinkedIn), Job fairs and recruiting events (to get employers and job seekers in the same room)

USE OF PARTNERSHIP

- Brief, informational presentation + week-long attendance by a Clark representative to their informational career-center seminars that happen every day
- Skills workshop (for furthering education in general or covering a unique topic) to add to their existing lists of offered basic workshops
- Stress on cost-effective ways of furthering education

TOPIC (MESSAGING)

- How to implement social media and Internet tools in a business context
- How to budget for planning and policy making activities or acquiring a basic understanding of standard financial reporting
- Solid strategies for employee empowerment through leadership (i.e. tips for public speaking or how to manage a small team effectively)

RELATED COURSE MATERIAL

- MSIT3220: Social Media Enterprise Integration
- MPA3620: Public Budgeting and Accounting
- MPA3930: Fundamentals of Business Analysis
- MPA3260: Leadership

PROGRAM

- MPA, MSPC

SPECIFIC DEMOGRAPHIC

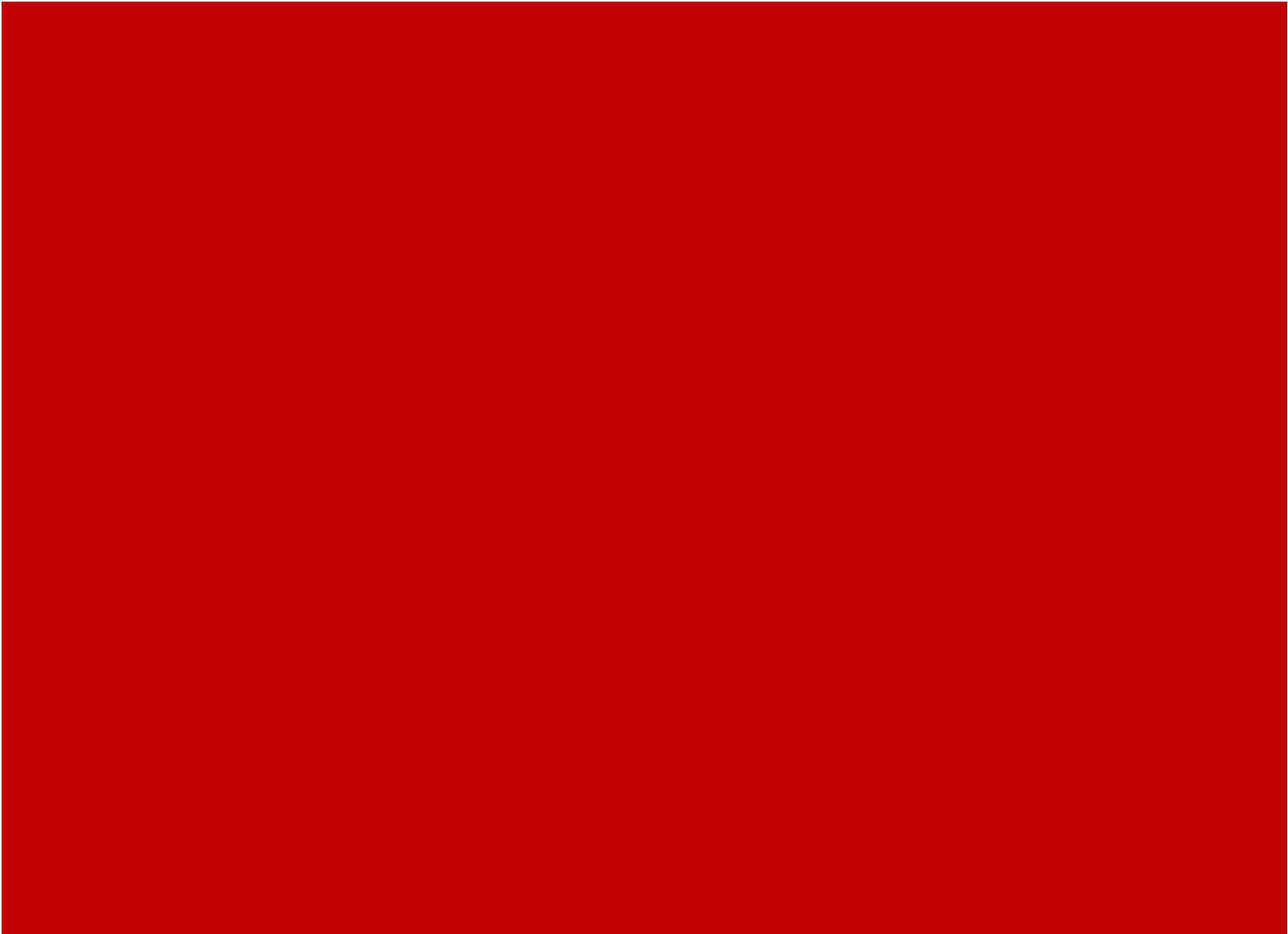
- Lower-income individuals (age 18 - 94) looking for a new job or undergoing retraining
- Want to better-than-basic skills that are useful in the workplace (but more for the level of the average person than an expert)

PERSONA MATCH

- Mid-Life Escapee



NICHE





YOUNG PROFESSIONAL WOMEN'S ASSOCIATION (YPWA)

Worcester, MA

Erin Janksy, President

(508) 740-3571

<https://www.ypwaworcester.com/about-ypwa>

NUMBER OF ATTENDEES / MEMBERS

- Events usually get 30-50 attendees, but the organization has a little over 100 members

INTERESTS / PURPOSE OF ORGANIZATION

- Goal is to engage Worcester's young professional women to learn more about the community and learn more about personal and professional development

TYPE OF PERSON

- College-educated women, age 20-40 who are entry-level or mid-level in their careers and active in the local community. They are ambitious, goal-driven, interested in upward mobility, and usually looking to improve themselves and grow their career

EVENT DETAILS

- Events are usually tied to local, women-owned businesses. They usually have 1-2 professional events, 1 community service, 1 social networking, 1-2 in collaboration with another networking group). They've found that the best events are ones where there is a lesson taught or an impact made -- people walk away feeling like they learned something, and took direct action after

USE OF PARTNERSHIP

- Host an event that merges social activity and topic (i.e. learning strategies for social media and marketing communication over a lunch at a new local restaurant)

TOPIC (MESSAGING)

- Impactful topics (ones that inspire direct action / change in their lives or businesses)
- How to implement social media and Internet tools in a business context (creating strategic management framework / SWOT analysis)
- Community-related topics (specific to Worcester area)

RELATED COURSE MATERIAL

- MSPC3050: Social Media Marketing and Communication
- MSPC3100: Marketing Communication
- MSIT3220: Social Media Enterprise Integration
- MPA3740: Strategic Management for Public and Nonprofit Organizations

PROGRAM

- MPA

SPECIFIC DEMOGRAPHIC

- College-educated women (age 20-40) who are entry-level or mid-level in their careers and active in the local community

PERSONA MATCH

- Late-Starter Student, Business-Grower



THE VENTURE FORUM

Worcester, MA
Scott Sutter, Chair of Events
(413) 519-6566
<https://www.theventureforum.org/>

NUMBER OF ATTENDEES / MEMBERS

- 200 people come to big events like the 5-minute Pitch, to as little as 5 people for "coffee hours"

INTERESTS / PURPOSE OF ORGANIZATION

- Take individuals with very early to early-stage technology and give them the platform to broadcast themselves to funding, capital venture, and angel investments

TYPE OF PERSON

- Tech-leaning business-minded or entrepreneurial young-professionals. College students who have an idea of what they want to pitch, bankers and vendors who use the events as a networking opportunity, and angel investors (small-seed type organizations)

EVENT DETAILS

- Kinds of events: "Partnering" competition (early-stage business paired with mentors), coffee hours, business-related events (i.e. 5-minute Pitch or talk on Blockchain Technology)

USE OF PARTNERSHIP

- Collaboration with planning their biggest events (i.e. the annual 5-minute Pitch held at WPI)
- Host a topical event of interest to the group where a professor or expert is the featured guest speaker (They currently do events like these)

TOPIC (MESSAGING)

- Trendy tech-related or project-management-related topics (i.e. blockchain, 5G, AI, Agile/Scrum, etc.)
- Clark-offered topics spun to specifically relate to entrepreneurs.
- On business intelligence solutions which deliver computerized support for managerial decision making
- On ways for managers to develop a new vision for the organization in light of strategic change (mergers, acquisitions, privatization, and/or shifts in product or product lines)
- Can be more flexible than other organizations in terms openness to theoretical topics

RELATED COURSE MATERIAL

- MSIT3210: Introduction to New Media Technologies
- MSIT3110: Cyber Security Fundamentals
- MSIT3440/3450: Intro to Python Programming / Data Mining with Splunk
- MSIT3840: Project Management for IT
- MPA3110: Applied GIS For Decision Makers
- MSIT3820: Business Intelligence
- MPA3170: Change Management

PROGRAM

- MSIT

SPECIFIC DEMOGRAPHIC

- Tech-leaning, business-minded or entrepreneurial young-professionals
- College students, bankers and vendors, and angel investors (small-seed type organizations)

PERSONA MATCH

- Tech Careerist

METROWEST WOMEN'S NETWORK, LLC

Hudson, MA

Sharon Cote Grimm, Director of Special Projects and Julia Becker-Collins, Co-founder

metrowestwomensnetwork@gmail.com

<https://www.facebook.com/MetroWestWomensNetwork/>

NUMBER OF ATTENDEES / MEMBERS

- 30-50 people meet face-to-face at the once-a-month meetings or events; 750 active members; 1.8k members online (on the Facebook group)

INTERESTS / PURPOSE OF ORGANIZATION

- Goal is to connect women, and to support each other personally and professionally. Aim to be an alternative to the "stuffer" Chambers

TYPE OF PERSON

- Millennial business-savvy women (around their 30's) who have a full-time job and a side-business; who are trying to tap into a fund resource or grow their professional network

EVENT DETAILS

- Kinds of events: wine tastings, shows in the Hanover Theatre, personal development meetings led by guest-speakers (i.e. about growing their business)

USE OF PARTNERSHIP

- Co-sponsored networking and social events
- Clark-offered topics relating to entrepreneurship, professional self-development

TOPIC (MESSAGING)

- Specifically, business-related topics, increasing individual competitiveness in the labor market
- *3 technical and business analysis skills that act as a foundation for management*

RELATED COURSE MATERIAL

- MPA 3550: Politics and Public Management
- MPA 3550: Change Management
- MSIT3220: Social Media Enterprise Integration
- MPA3930: Fundamentals of Business Analysis

PROGRAM

- MPA, MSPC, MSIT

SPECIFIC DEMOGRAPHIC

- Business-savvy women (age 30's) who have a full-time job and a side-business; who are trying to tap into a fund resource or grow their professional network

PERSONA MATCH

- Business-Grower



ADELANTE WORCESTER

Worcester, MA

Eric Batista, President

(508) 887-3986 | adelanteworcester@gmail.com

<http://adelante-worcester.org>

NUMBER OF ATTENDEES / MEMBERS

- Average attendance for events is 40 - 50

INTERESTS / PURPOSE OF ORGANIZATION

- Event organization focused on providing networking and skill based events to the Latino population in Worcester

TYPE OF PERSON

- Latinos in the Worcester area and surrounding (ex: Fitchburg, Southbridge), between 25 and 35 who are just beginning their careers

EVENT DETAILS

- Kind of events: networking, panel with speakers on anything from career to lifestyle, skill building; the organization does not have a location - they partner with other venues, colleges, function rooms, restaurants to have the events

USE OF PARTNERSHIP

- Host a workshop event / interactive presentation at Clark University

TOPIC (MESSAGING)

- Career topics that will help a younger audience just starting their career
- *The Do's and Don'ts of using social media as a business strategy*
- *Techniques on how to evaluate your own leadership style and improve upon it*

RELATED COURSE MATERIAL

- MSPC 3070: Organizational Communication

- MSPC 3050: Social Media Marketing and Communication
- MPA3260: Leadership
- MSPC 3620: Cultural Diversity and Intercultural Communication

PROGRAM

- MSPC

SPECIFIC DEMOGRAPHIC

- Latinos in the Worcester (age between 25 and 35) who are just beginning their careers

PERSONA MATCH

- Late-Starter Student



CENTER FOR WOMEN AND ENTERPRISE

Westborough, MA

Michelle Miller, Director

(508) 363-2300 | MMiller@CWEonline.org

<https://www.cweonline.org/>

NUMBER OF ATTENDEES / MEMBERS

- Average attendance for events is 10 - 40

INTERESTS / PURPOSE OF ORGANIZATION

- Focus: Starting and growing a business; Clientele: women and veterans

TYPE OF PERSON

- The typical client is a woman or veteran who is interested in starting a business, acquiring an existing business, or scaling up an existing enterprise

EVENT DETAILS

- Not a membership organization; interested in partnerships with SPS in education, like guest lectures, and skill workshops that pertain to their client interest.

USE OF PARTNERSHIP

- Educational partnerships: host trial lectures or skill workshops related to starting a business

TOPIC (MESSAGING)

- Topics that relate to starting a small business; Gender and business

RELATED COURSE MATERIAL

- MSPC 3070: Organizational Communication
- MPA 3740: Strategic Management for Public and Nonprofit Organizations
- MPA3260: Leadership

- MSPC 3620: Cultural Diversity and Intercultural Communication

PROGRAM

- MPA, MSPC

SPECIFIC DEMOGRAPHIC

- Women and veterans

PERSONA MATCH

- Business-Grower



UNCONVENTIONAL





TECHNOCOPIA

Worcester, MA

Drew Wilson, Team Member and Workshop Instructor

(774) 420-2244

<http://technocopia.org>

NUMBER OF ATTENDEES / MEMBERS

- Varies depending on the event, but average attendance is 20-50 people

INTERESTS / PURPOSE OF ORGANIZATION

- Provides project/tool-based workshops and rental spaces for a unique community of makers, artisans, educators and entrepreneurs

TYPE OF PERSON

- People looking for hobbies, young professionals, social justice oriented individuals
- Educators, entrepreneurs and hobbyists between ages of 28 and 35

EVENT DETAILS

- Kind of events: training classes and workshops within their shared work areas, specifically in the classroom and computer lab
- Hosts several types of events, such as Open Hack Nights where anyone is welcome to come to the space, whether they are members or not. Project/tool-based workshops include metal working, screen printing, laser cutting, 3D printing, etc.

USE OF PARTNERSHIP

- Attend one of their events and provide a workshop or offer a free course

TOPIC (MESSAGING)

- Computer-based skills, resume help, social media, management
- *3 ways to use social media to grow your professional network and brand yourself to future employers*

- *4 strategies to improve your own leadership skills while motivating other employees to become leaders*

RELATED COURSE MATERIAL

- MPA 3740: Strategic Management for Public and Nonprofit Organizations
- MPA3110: Applied GIS For Decision Makers
- MPA3260: Leadership

PROGRAM

- MPA, MSPC, MSIT

SPECIFIC DEMOGRAPHIC

- A combination: average age range is 28-35 (young professionals) but also individuals who do not identify with the "professional" label (i.e. artisans or social justice warriors).

PERSONA MATCH

- Late-Starter Student, Mid-Life Escapee



WORCESTER PUBLIC LIBRARY

Worcester, MA

James Estrella, Head of Human Resources and Daniel Chivvis, Current Employee

jestrella@mywpl.org

<http://www.mywpl.org/>

NUMBER OF ATTENDEES / MEMBERS

- Varies depending on event, average attendance is anywhere between 20 - 50

INTERESTS / PURPOSE OF ORGANIZATION

- The WPL has a specific section called "Adult Classes and Programs", some categories that we might be interested in suggesting are Community Topics, Computer & Online Resources, Resume Help, and Small Business

TYPE OF PERSON

- Young professionals between 20 and 25, and mid-career individuals between 30 and 40

EVENT DETAILS

- Kinds of events: "20-30 Somethings Worcester Living Meetup" (Community Topics) Tech Help, or get extra help with your job applications, documents, accounts" (Computer & Online Resources), "Resume Workout!" (Resume Help), and Business Plan Basics (Small Business)

USE OF PARTNERSHIP

- Focus on a specific skill-based workshop and/or provide an introduction to a specific course at Clark

TOPIC (MESSAGING)

- Resume help, entrepreneurship, management tutorials and real-life scenarios

RELATED COURSE MATERIAL

- MSPC 3050: Social Media Marketing and Communication
- MPA 3170: Change Management

PROGRAM

- MPA, MSPC

SPECIFIC DEMOGRAPHIC

- A combination of young professionals and mid-career individuals, specific income, gender, and race are varied

PERSONA MATCH

- Late-Starter Student, Mid-Life Escapee

Appendix E - Mock Presentations



CLARK UNIVERSITY
SCHOOL OF PROFESSIONAL STUDIES

THE SCHOOL OF PROFESSIONAL STUDIES




**4 TECHNIQUES
TO CREATE URGENCY FOR CHANGE
WITHIN YOUR ORGANIZATION**

A snippet from MPA 3170 - Change Management


AGENDA:

- What's important about change in an organization
- Why most change fails
- Introduce first step in change management and how to achieve it
- Discuss a concrete example in the workplace



CLARK UNIVERSITY
SCHOOL OF PROFESSIONAL STUDIES

THE SCHOOL OF PROFESSIONAL STUDIES



3 WAYS TO GATHER INFORMATION FOR MARKETING PERSONAS

A snippet from MSPC 3100 - Marketing Communication

AGENDA:

- Introduce the methodology behind personas
- How to utilize personas in different marketing strategies
 - Analyze the data
 - Work with a Team
 - Make them feel Real
- Template Practice



3 STRATEGIES TO EFFECTIVELY USE INSTAGRAM AS A SMALL BUSINESS OWNER

A snippet from MSPC 3050-Social Media Marketing

AGENDA:

- Introduction to Instagram as a platform and business strategy
- The use of storytelling
- Strategies to increase engagement with customers
- Examples of small business use

ADULT LEARNERS: TARGETED MARKETING

Appendix F - Design Takeaways

4 TECHNIQUES TO CREATE **URGENCY FOR CHANGE** WITHIN YOUR ORGANIZATION

A SNIPPET FROM MPA3170 - CHANGE MANAGEMENT



Identify potential **threats** and then create situations of what could happen if these threats occurred.



Analyze **opportunities** that could be exploited.



Start honest and dynamic **conversations** about the expected change.



Ask for **support** from customers and stakeholders in order to strengthen your argument.

75% of the company's management need to buy into the change!

CHANGE PROPOSAL TEMPLATE

A SNIPPET FROM MPA3170 - CHANGE MANAGEMENT

PROJECT NAME

PROJECT MANAGER:

DATE CREATED:

ORGANIZATION:

VERSION NO:

CASE FOR CHANGE

PROPOSED CHANGE: OVERVIEW OF PROPOSED CHANGE

WHY CHANGE IS REQUIRED: OVERVIEW OF REASONS NECESSITATING CHANGE

INTENDED OUTCOME: OVERVIEW OF RESULTING ACHIEVEMENTS AND BENEFITS

ESTIMATED TIMEFRAMES: ANTICIPATED TIME FRAME FOR PREP, PLAN, CONSULT, IMPLEMENT, EVAL

ADDITIONAL FACTORS: OTHER CRUCIAL FACTORS (WORK ENVIRONMENT, PREVIOUS CHANGES, ETC.)

ESTIMATED COSTS: COST/BENEFIT ESTIMATE FOR PROJECT

STAKEHOLDER IMPACT	BENEFITS	ADVERSE EFFECTS
STAKEHOLDER 1:		
STAKEHOLDER 2:		
STAKEHOLDER 3:		

APPROVAL

PARTY PROPOSING CHANGE:

SIGNATURES:

ADDITIONAL COMMENTS:

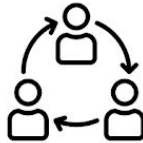
3 WAYS TO GATHER INFORMATION FOR **MARKETING PERSONAS**

A SNIPPET FROM MSPC3100 - MARKETING COMMUNICATION



Analyze the data.

Check your web analytics in order to discover the desires that led your audience to your site. Note where your visitors come from, what keywords they use, and how long they stay on your site.



Work with a team.

Gather information from other departments that interact with your customers. All aspects of the business know unique information about your customer so use it to get the full picture.



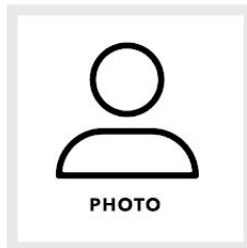
Make the personas feel real.

Make your personas feel like real people. Give them a name, add a photo to the reports.

PERSONA TEMPLATE

A SNIPPET FROM MSPC3100 - MARKETING COMMUNICATION

PERSONA NAME



AGE:

GENDER:

MARITAL STATUS:

CHILDREN:

LOCATION:

QUOTE:

OCCUPATION:

JOB TITLE:

ANNUAL INCOME:

LEVEL OF EDUCATION:

GOALS & VALUES

GOALS:

VALUES:

CHALLENGES & PAIN POINTS

CHALLENGES:

PAIN POINTS:

SOURCES OF INFORMATION

BOOKS:

MAGAZINES:

BLOGS/WEBSITES:

CONFERENCES:

GURUS:

OTHER:

OBJECTIONS

OBJECTIONS TO THE SALE:

ROLE IN THE PURCHASE PROCESS:

3 STRATEGIES TO EFFECTIVELY USE INSTAGRAM AS A SMALL BUSINESS OWNER

A SNIPPET FROM MSPC3050 - SOCIAL MEDIA MARKETING



Take it beyond the transaction.

Build a relationship with your customers, use Instagram as a space to engage and directly interact with your customers. Ask them questions, learn what they like and dislike.

Create a lifestyle around your offer.

Don't just post pictures of your product or service, customers don't constantly want to be sold to - create a feed that embodies a lifestyle that your product/service fits into.



Use customer-focused hashtags.

Think of hashtags that your customers would use and look at, such as tags that relate to product, customer interests or brand feeling.

If you're selling homemade candles - create a "calm" feed - a cozy couch with tea or someone enjoying a warm bath.



THE ESSENTIAL INSTAGRAM CHECKLIST

A SNIPPET FROM MSPC3050 - SOCIAL MEDIA MARKETING

15 STEPS:

- 1. Do you have the right lighting?
- 2. Did you use the rule of thirds?
- 3. Do you need to get closer or try a different angle?
- 4. Are you happy with the final shot?
- 5. Do you want to schedule your post?
- 6. Have you turned on push notifications?
- 7. Are you logged into the correct accounts?
- 8. Have you selected the best time for publishing?
- 9. Do you need to edit your photo or add a filter?
- 10. Do you have permission and have you given proper credit?
- 11. Have you used the optimal keywords and hashtags?
- 12. Have you checked your spelling?
- 13. Are the proper accounts tagged?
- 14. Have you selected the correct location?
- 15. Is the URL in your bio relevant to your caption?

ADULT LEARNERS: TARGETED MARKETING

Appendix G - Final Presentation Slides

ADULT LEARNERS

A TARGETED MARKETING APPROACH

APRIL 27, 2018



CLARK UNIVERSITY

Problem Statement

- Current workforce is in need of credentialed workers
- Universities are missing the chance to leverage this scenario
- Lack of targeted approach to reach potential adult learners in the local community

Past Practices

- Partnerships with Professional Organizations
 - Worcester Chamber of Commerce
- Workplace Seminars
 - Unum
 - City of Worcester
- Sample Event Topics:
 - The Science behind Motivation
 - Getting the most out of your Neurological Network
 - Relationship Building
 - Deliberately Developmental Organization Process



Research Process

Primary Research

Phone call interview
In person meetings
Attended sample events

Criteria

Purpose
Events
Attendees / Members

Organizational Analysis

Organization	Area	Phone Number	Website	Address	Industry/Market	Key Products/Services	Key Personnel	Key Dates/Events	Key Statistics/Performance Indicators
Worcester Chamber of Commerce

Agenda

- Project Introduction
 - Problem Statement, Target Audience, Past Practices
- Research
 - Industry Trends, Research Process, Organizational Analysis
- Solution
 - Marketing Personas, Action Plan, Category Breakdown
- Recommendations

Target Audience

Who is an "adult learner"?

- Adult learner population varies incredibly
 - Several motivational orientations
 - Competing commitments
 - Vary in occupation
- Older than 24 years old, with at least 3+ years of working experience

RESEARCH



CHALLENGE CONVENTION. CHANGE OUR WORLD.

Industry Trends

- Practical, skills-based approach
 - Directly translating curriculum into professional benefits
- "Micro-learning" experiences
 - Non-traditional, on-the-go, convenient learning opportunities
- Personalized education
 - Flexible, customizable approach to learning that fits the individual's unique needs

SOLUTION



CHALLENGE CONVENTION. CHANGE OUR WORLD.

PROJECT INTRODUCTION



CHALLENGE CONVENTION. CHANGE OUR WORLD.

Solution

There is a lot of potential in Central MA for SPS to get involved and partner with professional organizations, helping connect the programs to more adult learners.

We recommend a tailored marketing approach.

RESEARCH



CHALLENGE CONVENTION. CHANGE OUR WORLD.

SOLUTION



CHALLENGE CONVENTION. CHANGE OUR WORLD.

ADULT LEARNERS: TARGETED MARKETING

Marketing Personas

Mid-Life Escapee	Tech Careerist	Late-Starter Student	Business-Grower
45-55	30-40	25-35	25-40
Female	Male	Male	Female
\$90,000	\$90,000	\$45,000	\$75,000
Suburban	Urban	Urban	Suburban
GED / Community college	Bachelor's + Master's	Bachelor's	Bachelor's + Master's
Married, 1-2 children	In a serious relationship	Single	Newly-wed / Newborn
Low-level job with limited upward mobility	Mid-level in quickly changing industry (i.e. tech)	Recent graduate or Entry-level	Focused on current entrepreneurial venture

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Action Plan

- tailored marketing approach for each type of organization

Formula:

ORGANIZATIONAL ANALYSIS + **BIPE PROGRAMMING** + **PERSONAS**

Overview of prospective organizational partners + Specific course and degree program + Representations of audience

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Category Breakdown

- Traditional** (Chambers, existing relations with colleges, multi-purpose)
 - Worcester Chamber of Commerce
- Niche** (Very specific target audiences and purpose, specialized events)
 - Young Professional Women's Association
- Unconventional** (Rising in popularity, limited relations with colleges, potential for growth and expansion, multi-purpose)
 - Technocopia

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Traditional Group

Worcester Chamber of Commerce

- Purpose:** Serves business community with networking, social, business discussions for executives, middle managers and young professionals
- Event:** Present at Industry Round Table Event
- Persona:** Tech Careerist | Business Grower
- Messaging:** Techniques to address organizational change
- Course:** MPA 3170: Change Management

16

Mock Presentation

4 TECHNIQUES TO CREATE AGENCY FOR CHANGE WITHIN YOUR ORGANIZATION

AGENDA:

- Offer's important ideas change in an organization
- Why must change take
- Reduces first step in change management and
- How to continue
- Discuss a concrete example in the workplace

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Niche Group

Young Professional Women's Association (YPWA)

- Purpose:** Personal, professional, and community development for ambitious, educated, millennial women based in Worcester
- Event:** "Lunch & Learn" event at local restaurant
- Persona:** Business-Grower
- Messaging:** Creating personas strengthens your business offering
- Course:** MSPC3100: Marketing Communication

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Mock Presentation

3 WAYS TO GATHER INFORMATION FOR MARKETING PERSONAS

AGENDA:

- Proceed in the marketing funnel persona
- How to utilize personal and former marketing strategies
- Analyze the data
- Work with a team
- Make the persona feel real

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Unconventional Groups

Technocopia

- Purpose:** A shared co-working space for educators, entrepreneurs, and hobbyists (artists, crafters).
- Event:** Training Workshop at Technocopia
- Persona:** Mid-Life Escapee/Business Grower
- Messaging:** Using social media to turn your passion into a lucrative business
- Course:** MSPC 3050-01: Social Media and Marketing

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Mock Presentation

3 STRATEGIES TO EFFECTIVELY USE INSTAGRAM AS A SMALL BUSINESS OWNER

AGENDA:

- Introduction to Instagram as a platform and business strategy
- The use of marketing
- Strategies to increase engagement with customers
- Examples of small business use

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Recommendations

- Skill based material instead of theory
- Correlation between courses and presentation topics
- Send experts in the field to appropriate events

TARGETED APPROACH
EMPHASIS ON SKILL-BUILDING
FOCUS ON PARTNERSHIPS

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THANK YOU!

QUESTIONS OR COMMENTS?

CLARK UNIVERSITY
 CHALLENGE CONVENTION. CHANGE OUR WORLD.

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ADULT LEARNERS: TARGETED MARKETING

Appendix H - Project Charter



Project Charter - Adult Learners
Sarah Baldelli, Camilo Botero, Cami Ferreol, Caleb Horton, Xinyue Ma, and Stefan
Sprinckmöller

Clark University School of Professional Studies

1 Project Overview

1.1 Introduction

Clark University, a private research university in Worcester, MA focuses on educating undergraduate and graduate students to be imaginative and contributing citizens of the world, and to advance the frontiers of knowledge and understanding through rigorous scholarship and creative effort. The School of Professional Studies is a master degree program within Clark University. Within the School of Professional Studies, there are three degree programs that students can acquire: Master of Public Administration, Master of Science in Professional Communication, and Master of Science in Information Technology. All programs are designed for students to prepare for the changing workplace. The SPS student population is diverse, welcoming international students, ADP students, domestic students and adult learners to learn and work together and prepare for their future.

Our capstone project aims to research one subcategory of the SPS student body, adult learners. As a team, students will develop and research local affinity groups, organizations and events to reach the adult learner demographic. Students will research and recommend the best medium to reach the demographic, and then strategize messaging, content and design. Through this project, students will apply their skills and knowledge to develop a well-thought out research and recommendations that can be put to use within the SPS program as well as other graduate program. Through research, practical implication and deliverables, at the end state, the School of Professional Studies will have a better understanding of this specific demographic of adult learners, and where to reach them.

1.2 Major Stakeholders

- School of Professional Studies
 - Marketing Department
 - SPS Faculty
 - Student body
- Capstone Team
- Advisor
- Worcester Community
- Local Businesses and Organizations

2 Project End State and Scope

2.1 Required End State

- This project aims to expand and consolidate research for marketing to adult learners.
- The goal of this project is to gain a better understanding of the specific demographic of adult learners and how to reach them.

ADULT LEARNERS: TARGETED MARKETING

- At the end of this project, the School of Professional Studies will have a comprehensive research and implementation plan for marketing to adult learners, including design and messaging mock-ups.

2.2 *Project Scope*

The project scope is subject to change depending on research and client meetings. If a change does occur, all stakeholders will be notified and submit approval before it is official.

Work Area	In Scope	Out of Scope
Affinity Groups, Organizations, and Events	We will generate a list of organizations, affinity groups and events that will provide SPS actionable leads to access the adult learner demographic. We will provide contact information, demographics, attendance rates and other necessary details.	We will not scheduling, implementing or executing any events, partnerships, presentations and so on.
Messaging	We will create design and messaging mock-ups.	We will not implement official marketing campaigns or start new mediums.
Research and Recommendations	Through research, we also will gain a better understanding of our target audience in order to make educated guesses of their values, goals, constraints, risks and so on. This research will lead to effective recommendations for reaching this demographic.	We will not research strategies for marketing any other target segment. We will not provide recommendations for any other market segment besides adult learners.

1.1.1 **Change Management**

When a change request is made for the project scope, the project manager of the project team will discuss the change request with other members of the team and then relay the final message

ADULT LEARNERS: TARGETED MARKETING

to the stakeholders necessary. Following the change request, the project team will report on the change request, why the change occurred and analysis of the impact within this section of the project charter.

2 Assumptions

- All things equal, our group will meet the required deadlines to complete the Adult Learners Capstone Project.
- All things equal, our group will maintain consistent communication with our capstone advisor and client.
- All things equal, in addition to consistent communication, our group will make sure to meet regularly with our capstone advisor and client.
- All things equal, our group will deliver the final presentation on our scheduled date.
- All things equal, our group will manage to produce a tangible deliverable in addition to the formal essay and final presentation.
- All things equal, our final deliverables will be supported by a combination of academic research and creative initiatives.

3 Constraints

- Group members have different academic and work schedules, which might make it difficult to have in-person meetings and times.
- Time, even if we have established precise deadlines.
- Scope, which is why we should clearly narrow our project scope.
- Unexpected weather conditions.
- IRB approval, especially if we choose to conduct interviews in addition to our research.
- There might be a budgetary or cost-based constraint if we decide to produce a deliverable in addition to our essay.

4 Risks

Risk Matrix			
Risk (+/-)/Category	Probability of Occurrence	Impact of Risk	Risk Score = P*I
– A lack of prior experience in the field of continuing professional education may cause the team to overlook crucial steps or underestimate the time and resources necessary to execute them. (PROJECT MANAGEMENT RISK)	.25	.3	.075
Risk Mitigation	Get direct assistance from client / experienced professionals in the graduate		

ADULT LEARNERS: TARGETED MARKETING

	marketing department and maintain constant contact when making decisions / plans.		
– Varying attendance at team meetings may lead to a lack of participation or approval from key audiences when it comes to plan development. (PROJECT MANAGEMENT RISK)	.05	.3	.015
Risk Mitigation	Communicate to team that attendance at meetings is mandatory and imperative. Have post-meeting catch-up sessions if members are incomplete.		
– Relevant external organizations may refuse to be involved with the project. (EXTERNAL RISK)	.75	.5	.375
Risk Mitigation	Contact external organizations about their events and participation in advance. In case, have back-up organizations.		
– In terms of progressing through various stages of the project, the team may spend excessive amounts of time on some stages and insufficient time on others. (PROJECT MANAGEMENT RISK)	.25	.5	.125
Risk Mitigation	Update weekly planner with tasks and strict due dates. Regroup weekly about progression of project.		
– Poor data quality—a lack of sufficient data points at Clark University may limit the scope of research conducted (i.e. too few adult learners currently registered). (TECHNICAL RISK)	.75	.7	.525
Risk Mitigation	Conduct interviews (highly qualitative) over surveys (highly quantitative). If still insufficient, extend breadth of research.		
– The needs of the primary client may undergo changes mid-way through the project. (TECHNICAL RISK)	.95	.7	.665
Risk Mitigation	Establish scope and expected deliverables as soon as possible and have this in writing.		

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– Not all target audiences are identified or focused on, leaving gaps in the strategy. (ORGANIZATIONAL RISK)	.75	.5	.375
Risk Mitigation	Avoid overextending the reach of the project. Choose a specific target audience to focus on, and base strategy off that.		
– The allocated project budget is insufficient, limiting project efforts. (ORGANIZATIONAL RISK)	.25	.5	.125
Risk Mitigation	Generally base plans off a non-existent / small budget.		
– Potential ambiguity in the tangible deliverables—scope of project is ill-defined. (ORGANIZATIONAL RISK)	.75	.7	.525
Risk Mitigation	Give client consistent status reports on deliverables for clarity and transparency.		
– Potential deliverables and content may not be approved by the client or other key audiences. (ORGANIZATIONAL RISK)	.25	.5	.125
Risk Mitigation	Get approval for content and deliverables before actual detailed development.		
– Macro-level changes in curriculum / structure of continuing education programs are unfeasible. (EXTERNAL RISK)	.50	.5	.25
Risk Mitigation	Seek client approval to ensure that deliverables produced can and will be realistically implemented.		
– Team lacks authority to take certain steps or faces red tape while attempting to complete work. (TECHNICAL RISK)	.05	.3	.015
Risk Mitigation	Execute plans to the further extent possible and then get in contact with client or necessary authority to be able to proceed.		
+ Overwhelming or unexpected response from adult learners regarding campaigns / content / marketing efforts implemented (PROJECT MANAGEMENT RISK)	.50	.7	0.35

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Risk Mitigation	Exploit risk by funneling interested individuals to proper channels (new campaigns, information landing pages, etc.)		
+ More affinity groups / event organizers in the local area interested in project than originally anticipated (PROJECT MANAGEMENT RISK)	.25	.5	0.125
Risk Mitigation	Seek alternative ways for interested groups / organizations to be involved with promoting continuing professional education at Clark University.		
+ Clear positive associations gleaned from research data (i.e. involvement in graduate-level courses leads to higher salary outcomes) (PROJECT MANAGEMENT RISK)	.50	.7	0.35
Risk Mitigation	Heavily promote statistics in marketing campaigns and use numbers to guide future action.		
+ Team has capacity to produce more print or digital collateral / content than expected (TECHNICAL RISK)	.95	.7	0.665
Risk Mitigation	Take advantage of additional production and implement in a practical and concrete way for the program / department.		

5 Communication Strategy

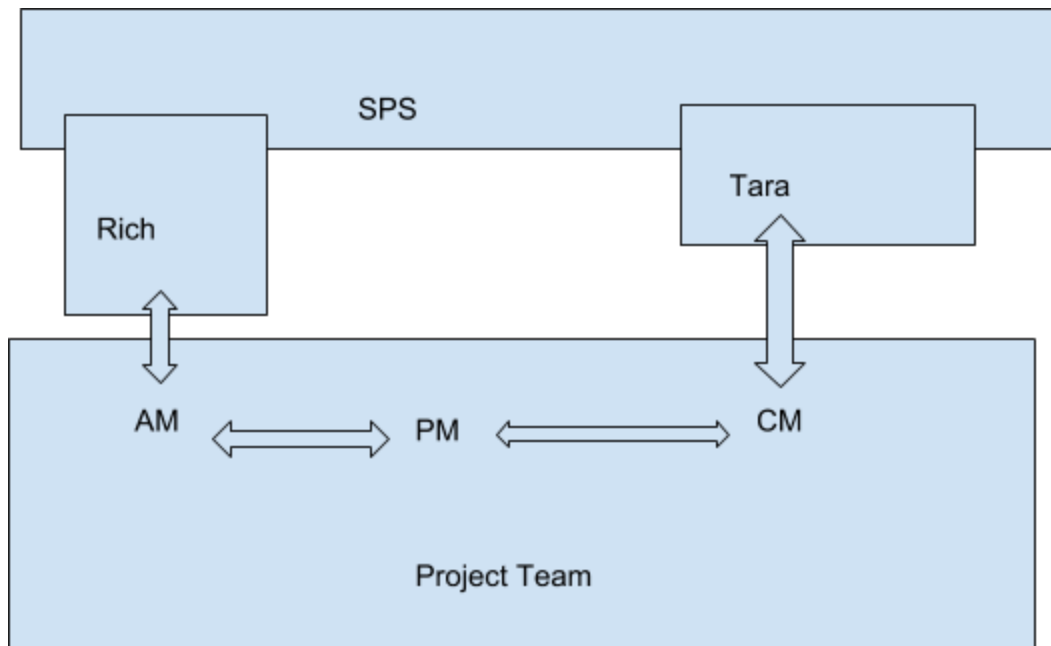
- **Official project documents as required:** Formal documents disseminated to all stakeholders. Includes:
 - Marketing Research for Client (due 2/1)
 - Project Charter (due 2/8)
 - Capstone Feedback Surveys (x2)
 - After submitting project charter
 - After concluding capstone course
 - Final Paper (due Week 14)
- **Formal milestone reviews as needed:** A formal presentation made to stakeholders during key points of the project in order to gain approval to proceed with next phase and/or work area. Each review will have defined approval criteria that need to be met to proceed with next phase.

ADULT LEARNERS: TARGETED MARKETING

- **Regular status report:** Monthly written report (2-page narrative) due the last week of every month, sent to all stakeholders that provides a summary of the project progress. Includes:
 - **Traffic light reporting** against major milestones, and for overall project
 - **Actions planned** in reporting period and **actions completed** in reporting period (with explanation of variances)
 - **Future actions planned** for upcoming reporting period
 - **Current issues**
 - **Current risks**
 - **Other** information as needed
- **Regular weekly status meetings:** Mandatory in-person meetings for all team members once or twice a week (likely Tuesdays and Thursdays, between 4pm and 6pm) to discuss each individual's current assignments / the overall progress or status report for project / details on next tangible deliverable due.
- **Informal communications:** Regular day-to-day communication among all team members (including the project manager) on existing *Facebook Messenger* chat, as well as regular email threads between all team members and Rich Aroian (capstone advisor) and between Tara Probeck (client) for questions, clarifications, and updates.

6 Project Structure

The team shares responsibilities for the project objectives, divided on an ad-hoc basis determined through consensus discussions. Developments, deliverables, and needs will be communicated between the team and Rich or Tara as they arise. The Advisor Manager will communicate between Rich and the Team. The Client Manager will communicate between Tara and the team. The Project Manager and all other project team members will communicate with each other.



7 Steering Committee and Stakeholder Commitments

7.1 Steering Committee (if applicable)

- o Because Tara is our exclusive client and point of contact, we will not need a committee to coordinate the project from the perspective of multiple interacting bodies. Developments in our marketing plan will be communicated between the team, Tara, or Rich as they arise.

7.2 Stakeholder Commitments

- o Tara will provide resources and information on Clark’s marketing strategy when requested.
- o Tara will provide feedback on submitted project documents within 3 business days.
- o Rich will guide our project and meet with the team to discuss project development.
- o We will fulfil our project commitments in the time specified in the project charter

8 Roles & Responsibilities/RASCI Chart

	Roles/Responsibilities				
	Capstone Advisor	Project Managers	Project Team	Client	The SPS Organization
Project charter including end state & scope	A, C, S	R, S	A, S	C, S	I
Project management & control	A	R	A	I, S	I
Project communication	A, I	R	A	A, I	I
Project planning	I	R	A	C, I	I
Resource allocation	I	R	A	I	I
Problem identification & analysis	I	R	A	C, I	I
Problem resolution	A	R	A	I	I

9 Measures of Success

Project Performance Dimensions by Project Success Factor	
Project Outcomes	Measure of Success
Project Agreements	<p>Meeting with team and client on regular basis in order to maintain constant communication</p> <p>Finishing our project prior to April 27th and having a clear, concise and professional presentation and deliverables</p>
Client Success	<p>Generating a marketing campaign ad research that will provide our client with a better understanding of this demographic</p> <p>Providing our client with the desired research, deliverables and end result that can be used as intended as well as potentially expanding the use to other graduate programs</p> <p>Determining a profitable and reachable target group and sector within the adult learner category</p>
Firm's Future	<p>Increase the number of adult learners that visit or gain interest in the SPS programs</p> <p>Increase the number of adult learner enrollments in the SPS programs</p>
Project Team	<p>Each and all team member feel that they gain new insight, developed a new skill or experience personal growth</p> <p>Team has great communication and are highly satisfied with the project outcomes</p>