

Jason Thomas – CTSM Candidate Portfolio



Director, Event Marketing

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Candidate Profile

I received my first introduction to trade shows while at my first real job, Shimadzu Scientific Instruments, Inc. as an intern in the marketing department. I began working with my manager, the Marketing Communications Manager, who was also in charge of the 75 trade shows the company attended each year. I was so intrigued by face-to-face marketing channels that I was hooked. I quickly realized I had a knack for process and thinking through the details of an event and how each relates to the attendee experience. Over 10 years ago, my manager and I began to pursue our CTSM certification together. Throughout the years, I have worked towards the goal of achieving my certification. This portfolio represents the culmination of a goal I have had for many years.

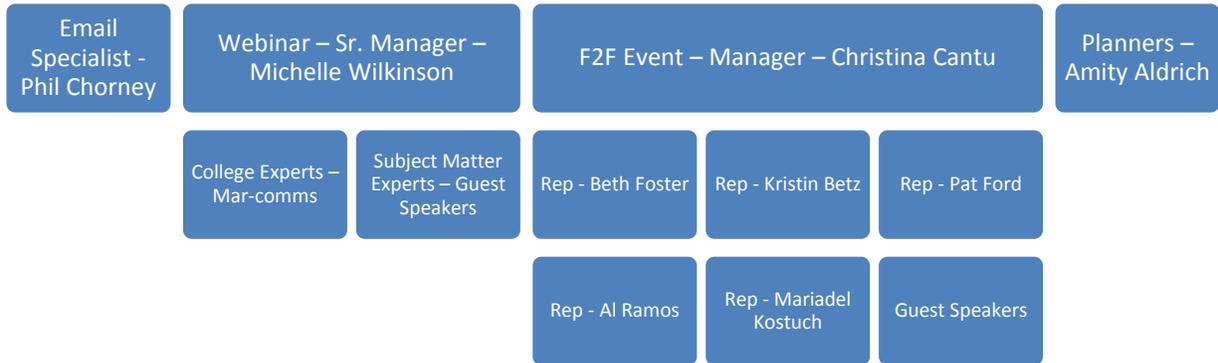
My passion has shifted from trade shows to event marketing. Throughout my career, I have held positions where I have had direct responsibility for event marketing. The idea of developing an event where previously one did not exist, from the ground up, is exhilarating. Each position I have accepted through my career has afforded me a different and unique perspective of marketing and event management. Multiple industries and roles have given me a well-rounded knowledge base.

There are very limited formal training options for trade show or event professionals. I currently hold an Associate's Degree in Business Administration. I am also a Certified Email Marketing Professional. Along the way, I have taken many smaller courses and training programs from varied seminars and training programs. I have found that certification programs are more useful and offer a more targeted skill set than traditional education. Certification programs, such as the CTSM, are the ideal way that works for me to learn and apply what I have learned in a fast and relevant way.

My current position is Director of Events Marketing within our Lead Development Marketing Department. I have grown this position considerably in my six-year career with Laureate Education, Inc. What started as a side project has evolved into a fully budgeted and supported marketing channel. My role is currently leader of this small team who is responsible for all prospective conversion information sessions and online events. I coordinate a multi-functional team, responsible for all aspects of developing and implementing any event we produce.

Vision – Executive Director – MaryLouise Wrabley

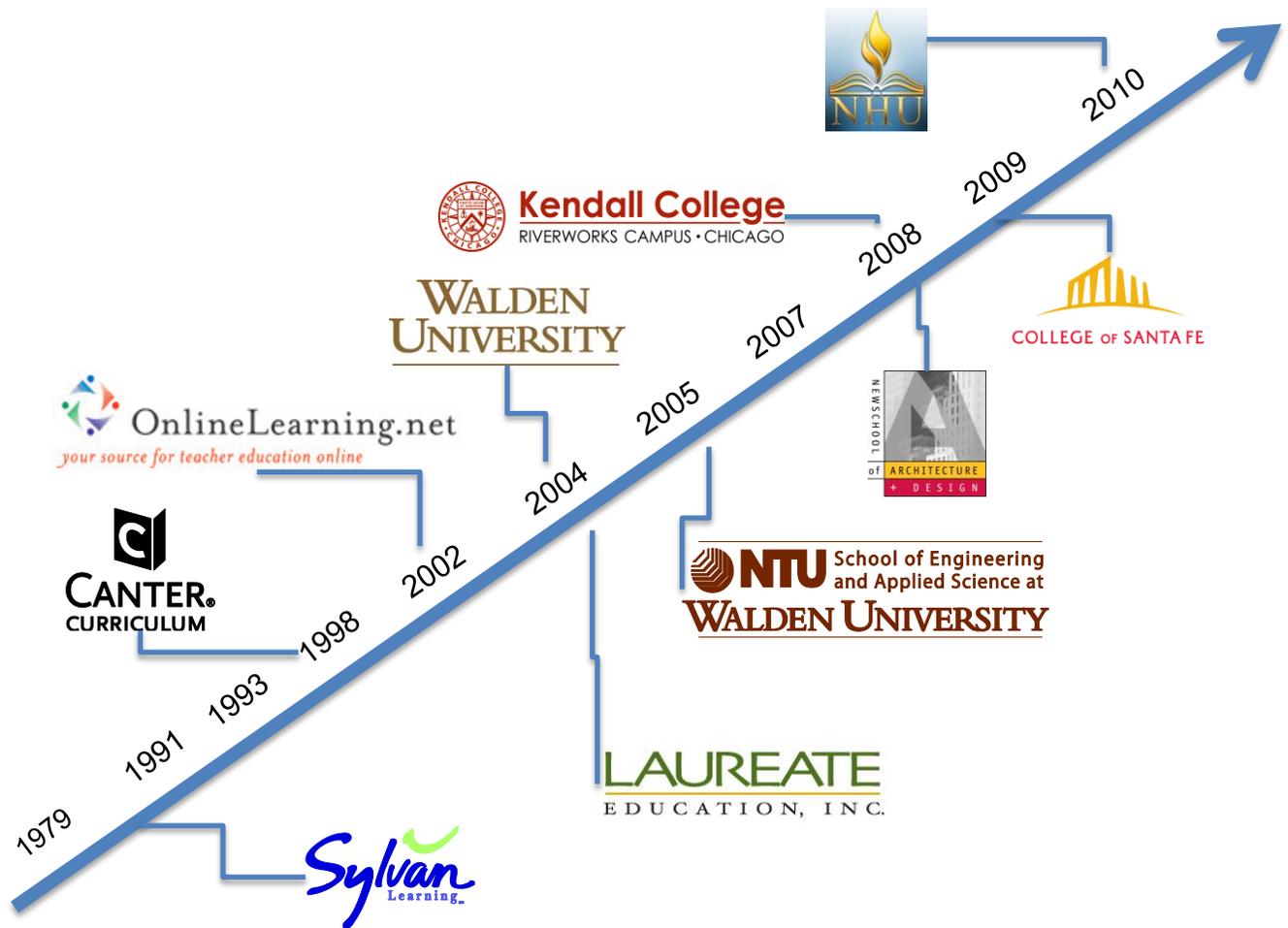
Coordination – Director – Jason Thomas



I over-see the entire process, from strategy and planning through execution and post event reporting. On any given day, I can be reviewing the contracts for an individual event to analyzing quarterly trends. Being accountable for all aspects, end-to-end, really allows me to use my vision and holistic insight on every element of our events program. Additionally, I also help align the channel with overall company goals and marketing department objectives. While this role leaves me little time to perform the tasks needed to produce an event, I do teach, monitor, and approve the work that every member of my team does. **Session 301 – Introduction to Event Marketing**, points to the reason my roles exists by asking the question “Does everyone understand the big picture?” This single question summarizes the need for someone in my position as well as the role I assume quite nicely.

Company Profile

I work for Laureate Education, Inc. Laureate is comprised of more than 60 institutions of higher education in 20 countries. Laureate has grown considerably throughout the years. Below has been the trajectory of our US based growth. Our growth is comprised of the acquisition and integration of other universities into our network.



Walden University, the primary university I work with and the work that this portfolio will center around has been in existence since 1970. Bernie and Rita Turner are two teachers who sought a way for working adults to pursue doctoral degrees in a distance learning fashion. This distance-learning model has evolved to an online learning institution with more than 65-degree programs and more than 330 specializations.

Serving more than 48,500 students in all 50 states and 140 countries, the needs of an event-marketing channel are far and wide. Walden University currently has six offices in the United States; corporate headquarters in Baltimore, MD, Academic offices in Minneapolis, MN, and

separate enrollment advisor sites in Columbia, MD, Tempe, AZ, San Antonio, TX, Los Angeles, CA. I reside in our corporate headquarters in Baltimore.

Walden University occupies the higher education market sector. Our diverse degree program offerings allow us to also support many separate markets. Walden is comprised of five separate colleges:

- [Richard W. Riley College of Education and Leadership](#)
- [College of Management and Technology](#)
- [College of Health Sciences](#)
- [College of Social and Behavioral Sciences](#)
- [College of Undergraduate Studies](#)

Walden's accredited, high quality learning experience begins with the unique way we develop our programs. Each program is developed in collaboration with industry experts and higher education experts to ensure our degree programs are relevant in today's world. Our learning model centers around 'learn it today, apply it tomorrow' learning objectives. This process allows our students to make an immediate impact, in their organization, career, and community.

Walden University's mission is as follows: "Walden, an accredited online university, offers degree programs that focus on relevant skills to be used immediately in the workplace and in your community. Our online degree programs reflect our mission of promoting positive social change." Our mission of social change is evident in everything we do.

Our list of competitors is growing each month. As traditional brick and mortar universities expand their degree portfolios to include online classes, they encroach on our established market share and reach. Our primary competitors are Phoenix University and Capella University. My event marketing channel is unique and a key differentiator among our competitors. Since we do not have a customer storefront, I have to create this in every event we produce. We offer the ability for an online student to stay connected and feel a part of a community.

Overview

This portfolio will review the summation of four years of events that consist of the output for my team; the Events Marketing Team, within the Lead Development Department in Marketing. I have chosen to include the entire yearly event program in this portfolio because the sum of the events, and their success, most accurately depicts how I have applied the teachings of the Certified Trade Show Marketer (CTSM) program to my work. The individual events all have the same objectives and goals. Because the program has culminating goals, it seems only appropriate to review the entire program's evolution.

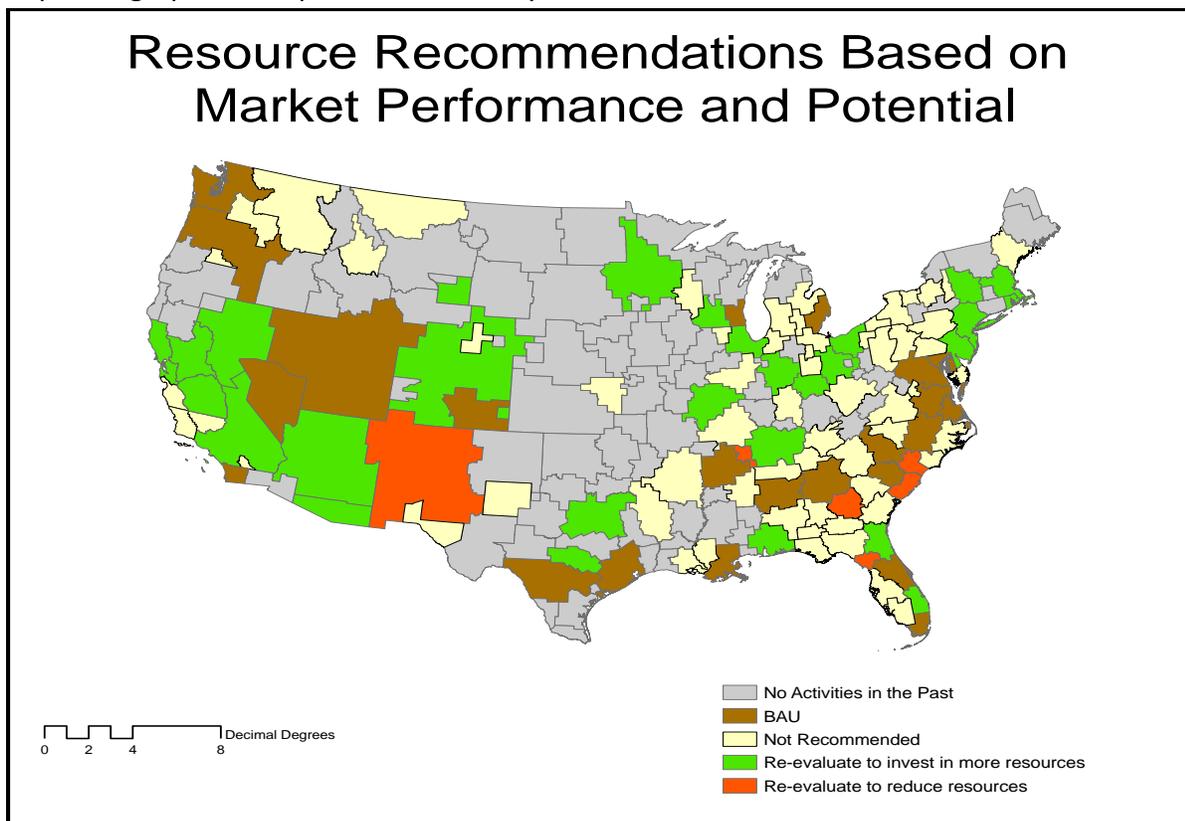
My focus for this portfolio will be reviewing the major adjustments and enhancements that I have made to the program. These changes have made major increases in both efficiency of the program as well as helping the program exceed its budgeted goals. I will be focusing on the information session, or event portion of this plan. Information sessions are actual face-to-face events, and most relevant to this portfolio, and align most closely with the teachings of the CTSM program.

The program consists of Information Sessions and Webinars that use our prospective database as an audience. We have hosted a varying number of events throughout the years, usually in the 400 events a year range. The number and size of events is something that I have worked hard to balance from a budget/resource/performance perspective. All events are hosted in the United States. These information sessions and webinars are targeted at prospects who have expressed interest in attending Walden University. The presentation topics attempt to move prospects through their conversion lifecycle; ultimately ending with the prospect enrolling in our university. Information sessions are geographically targeted events that are hosted in areas with sufficient density of prospects. Events can consist of a hotel based, classroom style setup, or a restaurant, dinner style meeting. We will delve into more detail about these events in later sections. Those details are pertinent to this portfolio as they are elements that have evolved from my CTSM teachings.

Event Schedule / Measureable Event Objectives

Event Schedule

Our event schedule planning process has evolved over the years. What previously was a very short time frame for event scheduling has grown into a full year strategic development initiative. Our more involved and longer planning cycle gives us more strategic latitude and far longer lead times to market our events. Events are now strategically planned utilizing a wealth of historical knowledge and research. **Session 20111 – Selecting the Right Shows: The Critical Decision, ELC #1** (Step One: background Analysis), was instrumental in guiding me to decide what research information I needed to make valid event selection decisions. Since an industry specific marketing event database does not exist, I had to develop my own. This session was instrumental in helping me design my research request to our Business Intelligence team. We performed a multi-phased spatial analysis report utilizing Esri Incorporated’s tapestry and geographical information system (GIS) data. This information gave us a clear picture, down to the Designated Market Area (DMA) level of what our penetration and market potential was in all DMA’s across the United States. This research gave us our areas of need. The figure below depicts a graphical output from our analysis.



One major element that was included in our research project also included our rich historical information from past event performance. This past performance helped to refine our conclusions.

The final output of our spatial analysis included a list of our top DMA's. The next steps included a lengthy planning process where we evaluated the following items to come to a final date and location schedule:

- Available budget
- Available resources
- Travel feasibility
- DMA recommendation adherence
 - Targets within the DMA

Lastly, we looked at our return on time spent. It is important to us to spend time on events and event types that produce the best return on our finite resources. Any events or event types that do not show a positive return are eliminated from future schedules. This gives us the flexibility to test new event types without wasting time on lower producing events.

The final planning process output consists of a Microsoft® Visio calendar document that puts venue places to actual dates. This document becomes the foundation for our actual implementation processes. This Visio calendar allows us to refine our budget and for staff to plan their travel accordingly. An excerpt is depicted below.

May 2012 - CONFIRMED						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
April 30	May 1	2	3	4	5	6
AR – Al Ramos BF – Beth Foster KB – Kristin Betz MK – Mariadel Kostuch PF – Patrick Ford		Seattle, WA – Couch - Exp Online Learning - AR Richmond, VA – MYI -DINNER - PF/MK	Tacoma, WA – Couch – Exp Online Learning - AR	Oakland, CA – DINNER – FYE – AR Virginia Beach, VA (Suffolk) - DINNER – Inside Walden – PF/ KB	San Jose, CA – DINNER – MYI - AR	
7	8	9	10	11	12	13
Dinner (18) Webinars (8) Couch (4) Residency Event (2) Total Events (32)	Teacher Appreciation Week Nat'l Nursing Week (2x) – Webinar – 3 pm/7 pm	Quincy, MA – Couch – Exp Online Learning - AR	PhD/DBA Residency – Houston, TX – BF/ KB	EdD Residency – Houston, TX - KB/BF Houston, TX – DINNER – MYI – BF	Austin, TX – Couch - Exp Online Learning - BF/CC evaluate (A)	Houston, TX – Walden Classroom to Students – 10:30 a.m. - KB
14	15	16	17	18	19	20
Webinar Key: Lead Presenter/ Moderator (A) – Alumni Confirmed		Webinar - Your First Steps to Success – 7 pm ET – MK/KB Alumni Conference Call – PhD Ed – 1 pm ET – KB	Las Vegas, NV – DINNER – FYE – AR Webinar - Walden	Salt Lake City – DINNER – MYI - AR McDonough, GA – DINNER – FYE – PF Webinar - Inside Walden – 7 pm ET –	Atlanta, GA – Dinner – Inside Walden - MK/KB/PF (A)	Webinar – Make Your Impact – NOON PT – BF/CC
21	22	23	24	25	26	27
		Brooklyn, NY – DINNER – FYE – AR/PF Dallas, TX – - DINNER- MYI- KB/	Bronx, NY – DINNER – FYE – PF/AR Memphis, TN – DINNER – Inside Walden - KB/MK/CC	Manhattan, NY – DINNER FYE - AR/ PF Nashville, TN – DINNER – FYE - MK	Minneapolis, MN – DINNER – FYE - MK	
28	29	30	31	June 1	2	3
	Memorial Day	Webinar - FYE – 7 pm ET – PF/MK Alumni Conference Call – PhD Mgt – 1 pm ET - MK	Philadelphia, PA - DINNER – Inside Walden - AR/CC Evaluate Webinar - Walden Classroom – 7 pm ET - MK/PF	Baltimore, MD – DINNER - MYI - AR Webinar – Make Your Impact – 7 pm ET – PF/KB Michelle/Christina - Baltimore	Michelle/Christina - Baltimore	

Aprimo is an enterprise marketing management system that was custom implemented for my company. All of our events are listed using Aprimo. This system now becomes the central system that keeps all of the different team members coordinated and on task. I am fortunate that in a previous role with Walden as Marketing Operations Manager, I was one of the three architects of the Aprimo installation and development. My advanced and intimate knowledge of the system affords me the ability to adapt the system to my team's needs. Aprimo becomes the foundation of our tracking and reporting. Planning of this magnitude would not be possible without this system. Aprimo's force multiplying abilities will become further evident in later sections.

Measurable Event Objectives

Session 20311 – The Nuts and Bolts of Budgeting for Results, ELC #6 (Using Templates to Track and Manage Budget) gave me lots of ideas to enhance our budgeting process. Our budgeting process not only calculates actual funding for the event plan, but also our budget performance goals. An event program of this size and scale requires a very formulaic and methodical budget process. Utilizing historical performance and actual costs, we are able to calculate average performance and average costs per event type. This base data gives me the insight to build a Goal Scenario & Assumptions model. Planned events calculated by average cost and performance build my yearly budget automatically.

We have a multitude of event types at our disposal. Through testing, we have been able to develop other event types that are as effective, and in some cases more effective. The combination and frequency of event types helps us penetrate our target demographics more thoroughly. Below is a summary of the different event types that I will reference in my budgeting and objectives analysis. As stated earlier, I will only cover the event formats that are face to face in nature.

Dinner / Field Recruitment Dinner



- This format is our most effective. We either host the event ourselves or enlist the help of local Field Recruiters. Their contacts can help increase the attendance rate by 5-10%. Additionally, they can extend our reach into areas we typically would find cost prohibitive to travel to.
- Dinner events are a variation of a dinner meeting. Attendees are treated to dinner while viewing a presentation. The run of show is orchestrated in such a way that the food service and presentation work in harmony to progress the event along and facilitate different needs throughout the evening. The addition of dinner increases our attendance rate over a traditional information session by 50%.

Info Session / Field Recruitment Info Session



- This traditional event format is what most universities perform; a classroom setting with minimal extras.
- We have upgraded the traditional info session beyond food and beverage basics, including more substantial food and additional branding.
- While lower attended, this format still has merit in new or untested demographics where a lower cost or trial run is necessary.

Enrollment Advisor (EA) Session



- This more involved event format involves a larger event staff. In addition to my representatives, we also include Enrollment Advisors, which are the equivalent to inside sales persons. Since our sales process typically does not involve meeting one's Enrollment Advisor, in geographic areas where this format is possible, it is an attractive and effective alternative.
- The event is run in a one-on-one appointment style event with a short overview presentation. Attendees have the opportunity to meet with an Enrollment Advisor and work with representatives.
- The rich experiences and knowledge an attendee leaves with make this event a high enrollment conversion event.

Each event type has an average cost to host the event.

<u>Session Type</u>	<u>Average of Activity Cost</u>
Dinner	\$3,500
Field Recruitment Dinner	\$3,500
EA Session	\$1,500
Info Session	\$900
Field Recruitment Info Session	\$900

We have a separate line item that we use for tracking shipping by each event

<u>Session Type</u>	<u>Average of Activity Cost</u>
Dinner	\$350.00
Field Recruitment Dinner	\$350.00
EA Session	\$350.00
Info Session	\$350.00
Field Recruitment Info Session	\$350.00

We add an extra line item for additional audiovisual costs that could be required at each event site.

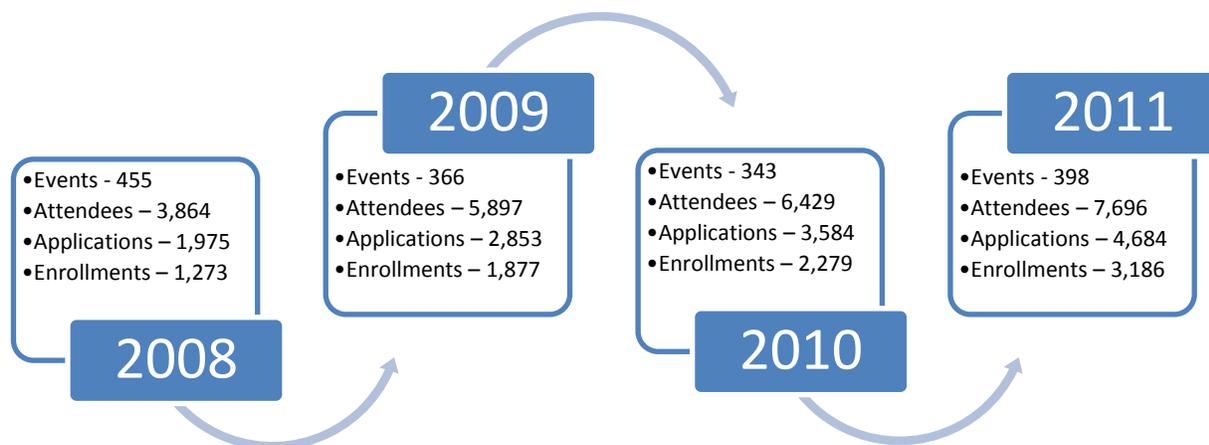
<u>Session Type</u>	<u>Average of Activity Cost</u>
Dinner	\$150.00
Field Recruitment Dinner	\$150.00
EA Session	\$150.00
Info Session	\$150.00
Field Recruitment Info Session	\$150.00

Average attendance is the basis for calculating our performance for each event. We track multiple performance objectives for each event, as well as an overall roll-up. By multiplying our projected attendance per event by our performance metrics, we can easily project each events potential goals. Each of these metrics are tracked by reviewing our event attendees throughout their customer life cycle with the university.

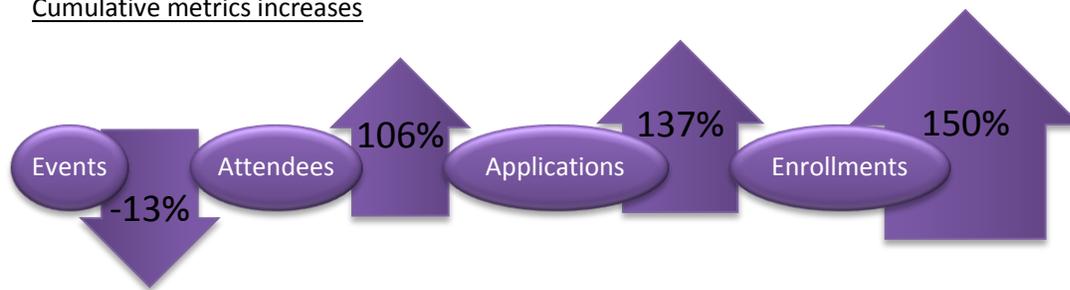
<u>Session Type</u>	<u>Estimated Attendance/Existing</u>
Dinner	30
Field Recruitment Dinner	15
EA Session	35
Info Session	9
Field Recruitment Info Session	3
Overall Average	24

The average attendance at each event is then utilized to calculate our performance metrics for each event. Our events performance is analyzed far beyond the attendance at the event itself. Attendees are measured on their life cycle progression metrics: application submission rates and enrollment rates. On average, we expect an attendance rate of 22% of our registrations per event. *(This is an averaged number. Individual event types and locations warrant adjustments to this average.)* After each event is held, we can project, and track against, our expected outcomes of the attendees. We expect 59% of our attendees to submit an application. We have a report that tracks how many attendees submit applications. In the same manner, we track application submissions; we also track attendee enrollments. We can expect that 41% of our attendees will enroll in their desired programs.

Taking the above calculations and combining this with our projected event schedule, our yearly budget and goals merge effortlessly. Both projected outcomes and verifying with actual numbers proves our budget and goal models to be quite accurate. Throughout the four years I have managed this program, we have seen increases on all trackable metrics. Below you can see the actual metric outcomes throughout four years.



Cumulative metrics increases



Objectives have been increased by careful observation of the communication – action – value chain (as learned in **Session 10811 – How to Measure the Value of Trade Shows, ELC #4** (The Communication – Action – Value Chain.) This unbreakable chain has been the leading cause of performance enhancements. This concept has led to changes in both event designs as well as marketing communications both pre and post. As demonstrated in the graphics above, we are able to increase our goals and projected outcomes, while holding fewer events. This efficiency has been extremely beneficial for our team.

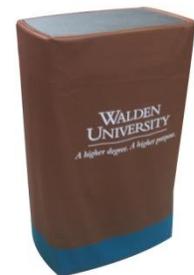
Management of Event Design and Production

Previous event setup was extremely limited. Each representative would travel with a banner stand and one table runner in addition to his or her laptop and LCD projector. In my opinion, this was extremely limited. Traditional information sessions included cheese and crackers and basic beverages. I felt that this significantly deviated from attendees expectations. **Session 31110 – How to Grow Your Brand: Incorporating Brand Marketing into your Exhibit Program, ELC #2** (How to position exhibit marketing within the greater real of organization-wide brand management) calls for consistency. I wanted to ensure that whether an attendee came to one or five events, they witnessed the same brand standards. A key component of our success as a university relies on our prospects and students making their way through the brand association process through to loyalty. This loyalty leads to prospect referrals. Our events strive to take our attendees through the process and provide an anchor point for our prospects and students to refer other prospects. Since our events could be the first interaction a prospect has with our university, or be a continuing engagement point, they have to be consistent at all times.

The primary purposes of these events are to present information to the audience on a topic that is relevant to the prospect. The environment should be conducive to this objective. Every element of this environmental design is built so that it reinforces the objectives. Because of the multitude of room layouts, it was necessary to design a 'kit' that would be flexible enough to handle any setup needs as well as be cost effective to ship and re-use. Our kit was built with the following requirements:

1. Self contained and easily shippable
2. Self hiding
3. Satisfy presentation projecting requirements
 - a. Presentation podium
 - b. Presentation screens
4. Have directional branding elements
5. Room branding elements
6. Application station
7. Contain toolbox equipment

Nothing exists in the market today that satisfied all of these objectives in an 'out of the box' type solution. The most cost effective way to achieve these requirements was to design a modified trade show booth pop-up implementation. This extremely customized option allowed for the greatest flexibility. The solution was a 10x10 pop-up booth case. This case, with a custom sized case sock housed all kit materials and turned into the presentation podium. This design allows for the self-hiding of the kit and any unused



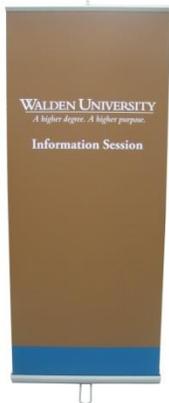
materials held within it. The podium and sock also added another branding element. **Session 215 – 49 Cost-Cutting Tips Every Small Exhibitor Should**, suggested that instead of shipping multiple containers, which will incur multiple handling charges, this single unit method will save

Because the primary purpose of each representative travels with a podium is the presenting point. stands were printed with magnets attached to each side of stands, when magnetized screen. When a screen is the custom projection screen can handle, the screens can be left in the kit and hidden.



each event is to present information, laptop and an LCD projector. The kit To reduce A/V cost, two banner primarily white space and had the seams. These two banner together, become a projection provided or event size exceeds what

To satisfy our need for directional and room branding elements, we loaded the kit with flexible and useful items. Two banner stands were printed; one with our logo and another with the words “Information Session” and a logo were included in every



kit. These two banner stands can be used to guide or prospects to the room location or add additional branding elements in the room if attendee traffic flow is easy or accounted for by the venue. Additional branding elements include one tablecloth, typically used at a registration table, and one fabric table runner.



An additional call to action for attendees at each event is to apply to our university. This application is housed exclusively online. We wanted to be ready to accept any applications that an attendee was ready to fill out. Again, we were able to account for this in our kit design to include an application station. This station pictured at the right; encompassed a laptop and a pop-up kiosk. Each event is booked with WIFI included at the event. For rare instances when WIFI is unavailable from the venue, each representative travels with a WIFI air card they can use. Session tests showed that application submissions rose 6% at events where an application station was present.

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APPLICATION STATION



Event design extends beyond simply the room itself. Everything from presentation development to the food service has been carefully thought through to orchestrate a memorable and productive experience for the attendees. The

largest part of any event build is the representatives staffing the event. **Session 21311 – Beyond the Basics of Booth Selling, ELC #5** (85% of your show success depends on your staff.) Their ability to handle any event setup and any attendee is critical to the success of each event. Each representative spends considerable time, approximately 20 hours a month, on training and refreshing: everything from product knowledge to public speaking and event management tactics. Beyond any environmental materials, our representatives have the highest and most profound ability to affect our event attendees. They handle the presentation delivery. However, beyond just delivering a presentation, they must also answer any attendee questions and help them with any next steps. They become the face of our university at these events.

Building on the representative's knowledge of university programs and processes, presentations are created. These presentations are more than simply PowerPoint's that a representative will read through. Great care is taken to understand the psychology of how an attendee will relate, understand, and retain information. No presentation section will last longer than 15-20 minutes before a Q&A break is introduced. Numerous studies have shown that attention spans will begin to wane beyond this length of time. The service times for our dinner events are coordinated with this in mind to ensure that attendees are focused and ready for the next subject area. The entire presentation is built on the compounding 'rule of three.' The human brain retains information more easily when topics and points are presented in threes. Three points per section, three overall sections, so on and so forth. We also depict information in multiply ways. It is possible to recall information 50-60% more accurately when it is graphical in nature than just text based. We incorporate multiple info graphics and diagrams when possible to enhance attendees recollection of the information they saw the previous night. The representatives further enhance their presentation delivery with vocal and visual emphasis. Cadence, repetition, pitch, power, even their position in the room during certain slides all enhance the impact they make when presenting. I have spent considerable time training the representatives on these points, to a level where they have exhausted my knowledge in this area.

All said; our events can resemble a theatrical production more than a traditional business meeting. **Session 31110 – How to Grow Your Brand: Incorporating Brand Marketing into Your Exhibit Program, ELC #7** (How to bring your brand to life in the spotlight....) The representatives carefully orchestrate an experience for our attendees that connect with the attendees on a personal level and give them a glimpse into what it will be like to be a student of our university.

Management of Integrated Marketing Communications

The Lead Development department's primary charge is to penetrate our prospective student database. Since my channel, Event Marketing, is a part of this larger department, I too must include the Lead Development objectives into my own. The ultimate outcomes are attendance at one of our events and have these attendees enroll in the university. Many of the methodologies I use are foundations of the Lead Development marketing strategies, with tactical reinterpretations.

We incorporate many other marketing channels, including email, direct mail, and listing our events on our company website. Additionally, our internal and external sales teams also incorporate our events into their sales conversations and marketing endeavors. Our matrix approach to marketing includes many stakeholders and channel owners. Email and direct mail are developed, implemented and tracked entirely on my team. **Session 30810 – Business Marketing Strategies and Trade Shows, ELC #1** (Strategies, objectives, mission statements, target, profiling, and tactics are all essential elements of a successful marketing plan) provided the foundation for understanding which channel would be the most effective. Additionally, it allowed me to help focus each channel's strategy and tactics appropriately. Furthermore, **Session 31511 – Integrated Marketing Communications, ELC #2** (Matching show objectives to the right medium,) helped me choose the correct channel with my objectives. I must also factor in other channel and team objectives to help them construct their mediums to help me obtain my objectives. Keeping so many stakeholders and channel owners coordinated and collectively contributing to my objectives is another aspect of my position. My channel's success not only lies with my team's direct actions but the collective work of the entire marketing and enrollment department.

Email accounts for the lion share of our event communications, as well as the greatest contributor to registration population. We utilize email to invite our prospects. We also use email to process our reminder messaging and any post event follow-up communications. The guiding strategy for this channel is to gain registrations for each event. All tactics described below help to accomplish this strategy.

Session 30810 – Business Marketing Strategies and Trade Shows, ELC #2

(Strategies are broad and directional in nature, providing a frame and structure for tactical development and use) helps to remind me that each tactic needs to be indicative of this strategy.

The advanced database segmentation, multiple email launching, and dynamic email processing is all made possible by our force-multiplier, Aprimo. This system houses our prospective student database, is our mass email engine, as well as our event tracking system. By combining all our work into this system, we gained the ability to very tactically and strategically target the appropriate population of the database for each event, and communicate with each prospect on an extremely relevant, individualized basis. Additionally, we gain a very robust contact history database where we can track our prospect behavior.

Our email event invitations follow a geographically targeted ‘route.’ This route is comprised of sectional center facility (SCF) codes for all of the major cities that we perform events. Our route methodology was developed to allow for greater consistency and comparison reporting. This has proved to be more beneficial over radius style segmentation. With radius style segmentation, we would not have identical populations of prospects that we invite to events in areas where we visit frequently, but not necessarily the same venue. By having



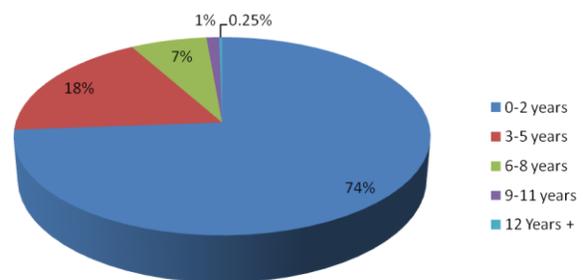
identical populations of prospects, we can effectively test what events, and marketing communications work for different routes.

Additionally, each invitation takes into account a complex set of segmentation rules that balance marketing requirements as well as channel best practices. Below I will explain the major areas of segmentation and expound on why each area is relevant.

Active sales pipeline status - The primary objective of our team and each event is to convert prospects to students. For that

LENGTH OF TIME OF ATTENDEES IN DATABASE

reason, we only select non-converted statuses. In addition to active statuses, we also incorporate remarketing strategies, with a status called 'recycled.' This status is for our older leads that have not converted. Because our channel is unique, we have a high response rate from older leads (see graphic.) Lead Development is the only team that communicates with the recycled population. This helps contribute to our success with this audience and a major reason we heavily incorporate this audience into our invitation segmentation population.

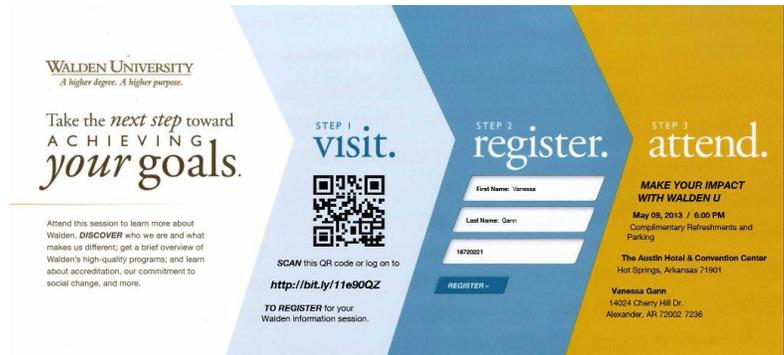


Lead inquiry timeframe – Prospects are segmented based on their age in our prospect database. Our current segmentation strategy includes anyone who is greater than 70 days old in our system and less than 6 years in our system. It was important to take into account other marketing activities for a prospect in our system. We found that other campaigns had a higher open rate and were more effective than our event invitations for audiences less than 70 days old. For this reason, we worked with the owners of the other campaigns and have integrated our invitation messaging into their communications and discontinued contacting those audiences. The combined work has led to campaigns that are more effective for everyone.

Internet Service Provider (ISP) email delivery requirements – Email deliverability requires that you take into account email engagement as well as opt-out and unsubscribed email addresses. We exclude anyone that has unsubscribed from company emails or has opted out of email communications. This is extremely important for retaining the ability to have our email invitations make it to our prospects inbox. This also allows us to decide which channel; email or direct mail, will be used to invite a prospect to an event. Furthermore, individual ISP's have different requirements for subscriber time and engagement metrics. Each is contained in this segmentation and is monitored and modified as needed.

All of these segmentation elements are the basis for our email invitation audience. This starting population is then sent through an event specific invitation interaction. Again, our Aprimo system houses the framework for this self-running and self-regulating system. A series of three email invitations are launched to each prospect for each event. The system self regulates by removing anyone that registers for an event or unsubscribes from further email communications. This interaction re-evaluates the population before each invitation launch. A prospect can easily click a button in their email and register to attend an event.

To further enhance the reach of the route population, we also launch a single direct mail postcard that also invites the route to an event. The only variation to the segmentation includes a change in opt-out. Instead of excluding email unsubscribers, we exclude direct mail opt-outs. This allows us to communicate to anyone

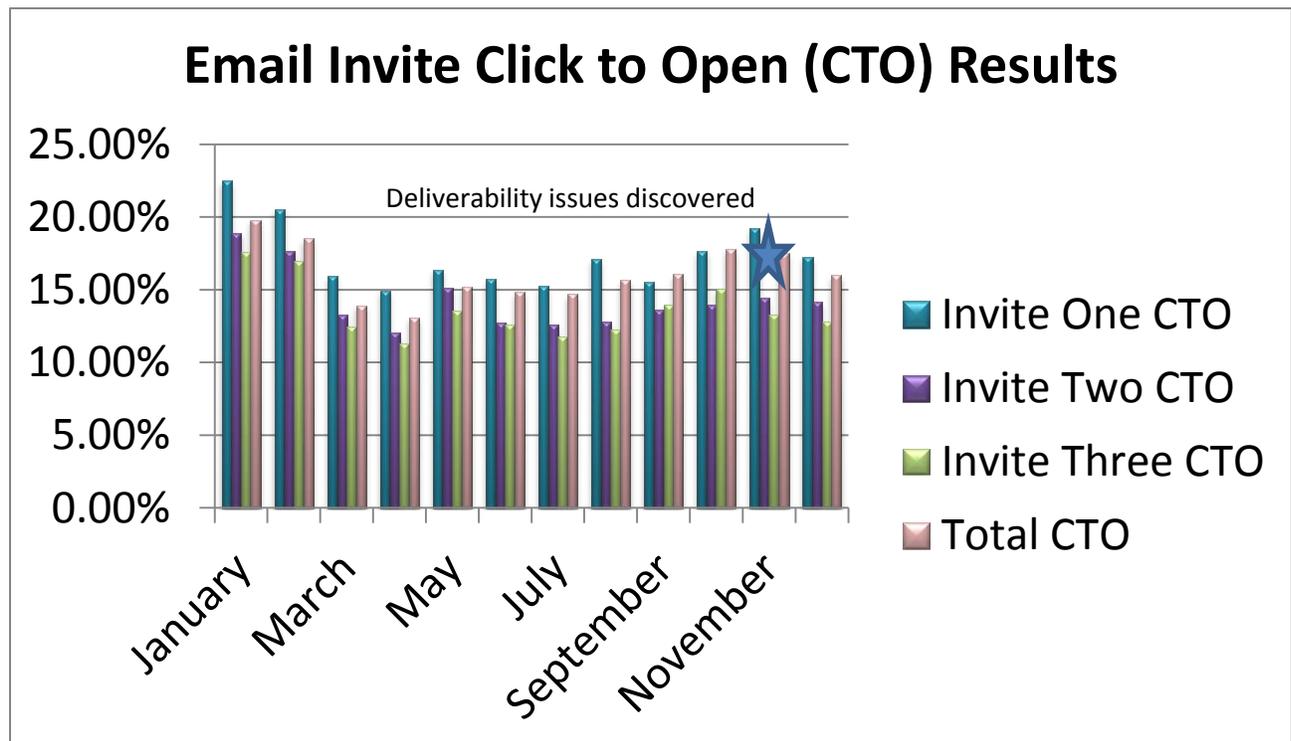


that has opted out of email. The response mechanism is either a shortened link or a QR code. Either function will operate the same as clicking the link in an email. Our invitation postcards are an extremely coordinated effort. They are targeted to deliver with an in-home date a few days after the first email invitation. Postcards have been extremely effective. They currently account for 30% of our registration traffic. Postcard registrants have a 30% attendance rate.

Email is an extremely challenging channel to track and refine. Multiple metrics need to be tracked on a consistent basis. We track everything that we can. Success for our emails fall into the following ranges:

1. 80% inbox deliverability
2. 7% open rate
3. 13% click to open rate

We track these metrics for every email we launch. This helps us to optimize each individual invite in the series. **Session 31511 – Integrated Marketing Communications, ELC #5** (Set measurement benchmarks,) requires that everything we do is trackable and comparable to benchmarks. We benchmark our own performance against like campaigns as well as compare results to other like channel campaigns other teams are doing. We have to keep perspective of our channel performance, not only to our benchmarks, but also to industry standards for each channel. It is not enough to me that the channels perform well compared to our own work, but also against industry standards. Below is a report view of email Click to Open (CTO) results that we track for our email invitation performance.



Management of Results Reporting

Effective reporting of results begins with the ability to have measurements. Measurement begins with something to track. I have taken great length to have every aspect of our event program trackable. **Session 110 – Metrics Matter: Choosing Measurement Tools That Will Best Evaluate Your Program, ELC #1** (What are “metrics?”) gave me the foundation and validation that everything we do needs to have a measurement to gauge success or failure. From event planning through to attendee conversion, each has a report or success metric. Because my program is a yearly program, comprised of multiple events, each success metric is convertible to track the success of a single event or to look at a grouping of events.

Multiple team members report on the success of each event. Each person reports on the areas relevant to their role in the overall process. By combining all of the individual metrics, everyone contributes to the results reporting, and a full 360 view of our events.

Our reporting starts with registration and attendance reports. We track all individuals that register to attend our events. This lets us effectively ‘right size’ the event. We use historical reports to gauge our estimated attendance rate. By using this data, we can make effective decisions on the size of the event and make any event changes that would help the event be more effective.



Activity ID	Classification	Session Format	Session Topic	Field Representative	Location City	Location State or Province	Event Registered	Count	Guest RSVP	Projected Attendance	Fill Percentage
4265404	The National Hispanic University (NHU)	Dinner	Discover National Hispanic University	Azulán Cervantes	Centras	California	Yes	4		12	33%

The above registration summary report sample shows the following information

- Event information
 - Activity ID
 - Brand
 - Session Format
 - Session Topic
 - Field Representative
 - Location information
- Current registration total
- Guest RSVP (to account for additional seats needed)
- Projected attendance
- Fill Percentage

The “Fill Percentage” is where we apply all of our historical attendance information, previous attendance rates, and calculate the actual number of seats we expect to fill at each event.

After each event, our event representatives add reporting flags for all of our attendees in Aprimo. An attendance report is depicted below. This becomes the foundation for our Application and Enrollment metrics. This attendance flag allows us to track the attendees through the enrollment life cycle sales process.

Our results reporting can also begin to take a strategic and deeper business intelligence standpoint. Having our individual and event activity reporting metrics allows us to look at more trending and strategic performance analysis. When we stop looking at individual event performance, and instead roll these metrics into monthly and yearly results, we can begin to slice our data into more interesting and knowledgeable aspects.

Below are the attendees for the **UMET ACHIEVE YOUR GOALS DINNER Session – TACOMA, WA – APRIL 24TH**.
Please follow up with your attendee(s) as soon as possible.

The "Status/Notes" column indicates any particular information that will need to be addressed in your follow up. Attendees were instructed to complete an application online within 24 hours to secure the \$50.00 application fee waiver.

Thank you.

TOTAL NUMBER OF REGISTRANTS = 11
TOTAL NUMBER OF PROSPECTS = 4

Enrollment Advisor	Individual ID	First Name	Last Name	Program	Specialization	Current Status
Leads 360	18658812	Wanda	Cheney	MS Nursing	*C-WLD MSN Gen. (BSN-MSN)	Recycled
Leads 360	21148420	Nicole	Klein	MS Nursing	MSN, Edu RN-MSN	Recycled
Leads 360	22273521	Lucretia	Robertson	PhD Psychology	PHD Psy, Org Psy	Recycled
Tracy Becerra	22150363	Virginia	Fries	MPA	MPA, Emrgcy Mgmt	Qualified

Strategic analysis allows us to look at trends such as attendee life cycle age, pipeline status, and program of interest. This more holistic cut at our attendee base helps to refine and target attendees with the greatest performance. This helps to refine our target attendee segments and apply our finite budget to the greatest impact area of our prospect database.

Again, being able to roll up the individual event performance data into a holistic database, we can review our activity planning as it compares to performance. Here, we can review event types, locations, and presentation topics. We can review which event types and topics have the greatest performance. Reviewing where these events were allows us to better target the individual location of each event.

Our reports are distributed with the intended audience in mind. Each report is built to take into account the amount and type of information the intended audience can consume as well as what will be actionable. Attendance reports for each event are distributed with detailed information about the attendees. More detailed strategic reports are written on a higher level, refraining from individual attendee reporting for more strategic directional style analysis.

Again, **Session 110 – Metrics Matter: Choosing Measurement Tools That Will Best Evaluate Your Program, ELC #4** (How do I know what to track or measure?)” helped me focus on what I will be expected to answer too from my superiors. Anything that won’t help me gain a greater knowledge of my event program or help me fine-tune its performance simply isn’t tracked. However, I do ask the question “if we can’t track it, why are we doing it?”

All of our results reporting allow us to fine-tune our event program in every level. What could appear to be a small change in one event, could force multiply to exponential improvements in the entire program.

Conclusion

I have learned a great many things throughout my CTSM instruction from the course instructors and the course materials. The most overarching theme I have taken to heart is that major changes and exploring new territory is not always the best option. Rather, the fine tuning and refining of my existing tactics and strategies can sometimes lend to better performance. Plan, test, refine, test again has become a mantra that I practice repeatedly in my daily management of my program. I also found it comforting that some of the classes validated what I had tested and learned on my own. In this line of work, not everything is learned from a classroom setting. I am enlightened that I have the ability to learn from past experiences and interpret them in a meaningful way. Taking it one-step further, there were CTSM classes that taught me elements of an event that do not wish to partake in. One prime example is what I learned in **Session 41910 – Liquor Liability and the Law: What You need to Know, ELC #5** (Social Host Liability,) we will not serve alcohol at our events. A university is not in the business of serving beverages. This adds a new level of risk and event management that neither myself, nor my company wish to undertake. Furthermore, I feel that this element will detract from our primary goals and objectives at our events.

Through continued testing and refinement, I have been able to increase our enrollment performance 150%. My program has evolved throughout the years. I can attribute to my acquired knowledge from the CTSM program. Each class has made me review the individual pieces of my event program and review how I can do it better. The collective effect the CTSM program has had on my ability to lead this team is evident in each of our metric performance indicators.

I am going to continue to refine every element of my event program. The next focus I have is on the actual event attendee conversion process itself. We have demonstrated that we have a solid strategy for gaining attendance. Now the next frontier is to stimulate an increased enrollment conversion from the information shared at each event. In four short years, I have been able to grow the team and their capabilities to new heights. What previously was considered success then, would now be considered a failure. Just recently, we tested a new event format; aptly named “supersession.” This robust format capitalizes on everything the team is capable of and utilizes all the best tactics we have in one event. Early results from this event are extremely promising; showing an increase in enrollment velocity that far exceeds any of our best events. I attribute our success to the scrutiny that I place on every aspect of our event program. If we cannot measure it, then why do it?

The “supersession” is but one example of our increased abilities. I cannot take credit for all of the success my team has obtained. What I do pride myself on is building a team that is more capable, more agile, and extremely skilled in their areas. I have utilized my own experiences

and questions from CTSM courses and posed it back to my teammates to answer in their areas. They know what I'm looking for, and now strive to answer the questions before I have them.

I am extremely proud of the work myself and my team accomplish every day. As my own confidence has grown, so has my team. Writing this portfolio has had a reflective quality that I recommend anyone do at some point in his or her career. It has made me reflect on the choices I made in my work as well as my education. Validation that I actually have mastered my job, and took the steps to be recognized for it is a powerful goal to obtain. To obtain a personal goal that has taken many years to reach has been a very humbling and exhilarating experience.

References

- Vital Statics-Candidate Profile
 - **Session 301 – Introduction to Event Marketing**
- Overview
- Event Objectives / Event Schedule
 - **Session 20111 – Selecting the Right Shows: The Critical Decision, ELC #1** (Step One: background Analysis)
- Event Schedule
- Measureable Objectives
 - **Session 20311 – The Nuts and Bolts of Budgeting for Results, ELC #6** (Using Templates to Track and Manage Budget)
 - **Session 10811 – How to Measure the Value of Trade Shows, ELC #4** (The Communication – Action – Value Chain)
- Management of Exhibit Design and Production
 - **Session 31110 – How to Grow Your Brand: Incorporating Brand Marketing into your Exhibit Program, ELC #2** (How to position exhibit marketing within the greater real of organization-wide brand management)
 - **Session 215 – 49 Cost-Cutting Tips Every Small Exhibitor Should**
 - **Session 21311 – Beyond the Basics of Booth Selling, ELC #5** (85% of your show success depends on your staff)
 - **Session 31110 – How to Grow Your Brand: Incorporating Brand Marketing into Your Exhibit Program, ELC #7** (How to bring your brand to life in the spotlight...)
- Management of Integrated Marketing Communications
 - **Session 30810 – Business Marketing Strategies and Trade Shows, ELC #1** (Strategies, objectives, mission statements, target, profiling, and tactics are all essential elements of a successful marketing plan)
 - **Session 31511 – Integrated Marketing Communications, ELC #2** (Matching show objectives to the right medium)
 - **Session 30810 – Business Marketing Strategies and Trade Shows, ELC #2** (Strategies are broad and directional in nature, providing a frame and structure for tactical development and use)
 - **Session 31511 – Integrated Marketing Communications, ELC #5** (Set measurement benchmarks)
- Management of Results Reporting
 - **Session 110 – Metrics Matter: Choosing Measurement Tools That Will Best Evaluate Your Program, ELC #1** (What are “metrics?”)
 - **Session 110 – Metrics Matter: Choosing Measurement Tools That Will Best Evaluate Your Program, ELC #4** (How do I know what to track or measure?)
- Conclusion
 - **Session 41910 – Liquor Liability and the Law: What You need to Know, ELC #5** (Social Host Liability)