

CONNECTED24

Strategic Differentiation

Understanding Student Personas to Build Your Unique Value Proposition



Meet Your EAB Presenter



Christina Hubbard, PhD
*Senior Director,
Research Advisory Services*

Discussion

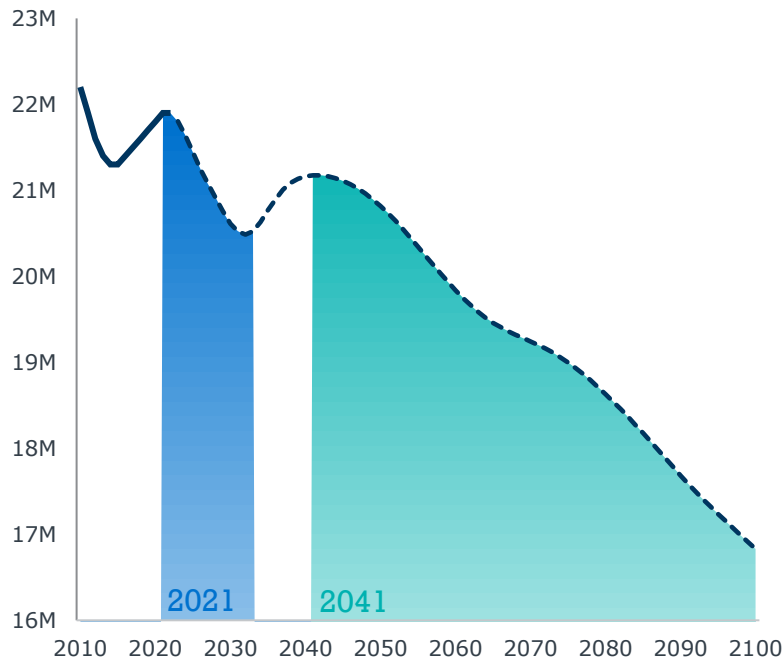
Describe one area of your work that has been impacted by increased competition.



Fewer People Means Fewer Enrollments

Demographic Cliff Followed by Even Steeper Decline Through 2100

United States 15-19-Year-Old Population, IHME Projection



The Demographic Cliff

-6.3% or **-1.4M**

Decline in the 15-19-year-old youth population, 2021-2032

Peak Population

-21% or **-4.3M**

Decline in the 15-19-year-old youth population, 2041-2100

3x

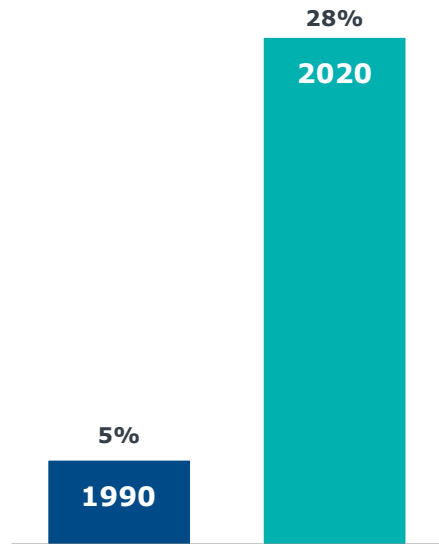
Declines from 2041-2100 represent a reduction in the college-going population ~3x the size of pandemic-era enrollment losses

World Markets Dominated by a Few 'Ultra-Winners'

Superstar Firms Consolidate Market Power During the Pandemic

Top 50 Firms Now Worth 30% of Global GDP

Stock Market Value to GDP Ratio



Trend Driven by Agglomeration, Strategies of Growth over Profit



Features of Ultra-Winner Firms

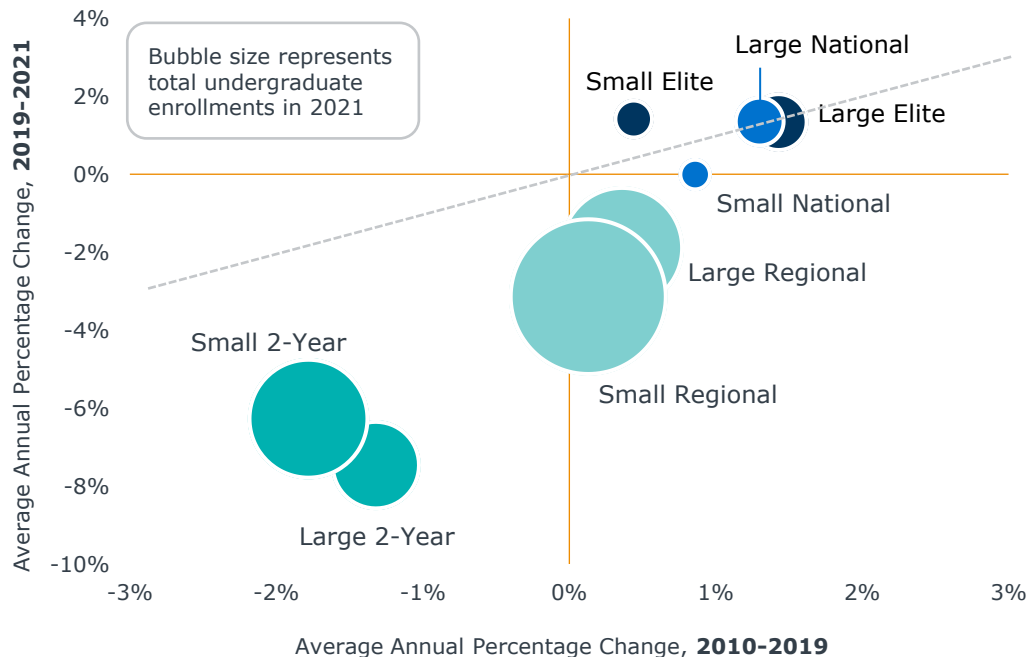
- Firms outspend competition, willing to **sacrifice short-term profit for long-term growth**
- Majority of profits come from a **handful of top-selling, highly scalable products**
- Firms focused on **consumer experience**
- Firms **begin expansion from position of dominance** in a smaller, unique market

Source: Bloomberg "World-Dominating Superstar Firms Get Bigger, Techier, and more Chinese," May 2021 ([link](#)); Washington Post "How Big Tech got so big: Hundreds of acquisitions," April 2021 ([link](#)); EAB interviews and analysis.

Flight to Size and Selectivity Continues

Undergraduate Enrollment Trends by Segment

Grawe and IPEDS Data, 2010-2021



1) Large => 2500 first-time, first-year enrollments in 2010.

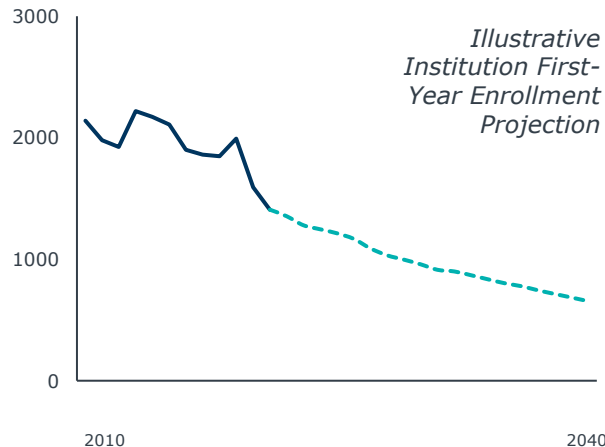
2) Elite (Top 50 from US News Rankings in 2019); National (Top 51-100); Regional (outside top 100).

Many Campuses Poised to Shrink in Coming Years

EAB Analysis of Future Institutional Enrollments

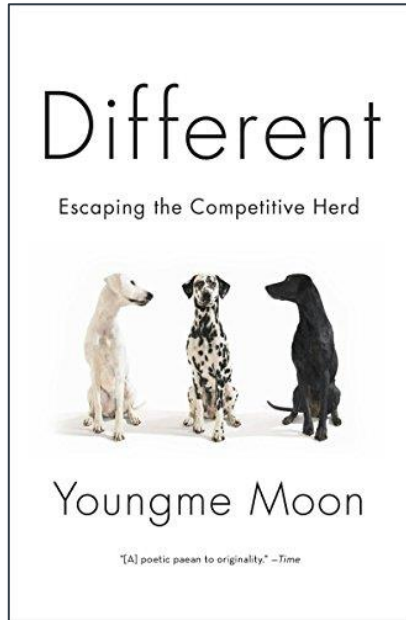
Three Primary Drivers in Enrollment Projections

- 1 **Market Share:** The flight to large and selective institutions across student types will continue fueling market concentration
- 2 **Participation Rate:** While the high school graduation rate generally increased in the last decade, rate of college-going is falling
- 3 **Demographics:** Demographic-driven declines will affect all segments but will be worse for some



Estimated Cumulative Number of Four-Year Institutions with 25% and 50% Declines in First-Time First-Year Enrollment from 2022





1

Augmentation by addition (“New and Improved!”) and **augmentation by multiplication** (“32 Flavors!”) are making consumers numb to choices

2

In many mature markets, **the differences between products become imperceptible to all but true connoisseurs**, reducing most choices to a simple formula (cheapest, most popular, etc.)

3

When asked what they want, consumers mostly point to our weaknesses—driving businesses to become more like their competitors instead of focusing on strengths

4

What results is “Herd Mentality” within product categories—businesses racing to keep up with each other and arriving at the same place despite no actual coordination

Case Study: Who Does This Describe?

One Institution's Unique Institutional Differentiators



Global Citizenship

At the University of X, we inspire communities to think and act globally and inclusively and to be equitably invested in addressing our planet's most pressing problems and advancing social justice.



Holistic Student Experience

U of X students—past, present, and future—benefit from an experience that builds a life of purpose and develops their intellectual growth, character, well-being, and careers.



Collaborative Problem-Solving

Our community collaborates on research that breaks new ground, enhances knowledge, addresses inequities, and channels passions to serve the public good.



Campus and Location

With campuses offering easy access to natural beauty and a vibrant downtown center, the University is a perfect setting for learning, reflection, and meaningful connections.



Redefining Innovation

At U of X, we foster an environment that attracts diverse perspectives and unique points of view, sparking critical conversations and cultivating the thought leadership that leads to new ideas, solutions, and real change.

Many Claims Commonplace or Peripheral

Twin Pillars of Traditional Branding Don't Help You Stand Out

Ideals that are appealing but assumed

Diverse Inclusive Vibrant
Transformation
Small Classes Strong
Change Experiential Community
Caring Faculty Innovative Impact
Wellness Student-Centric
Global Academic Rigor

Attributes that are distinctive but not connected to audience



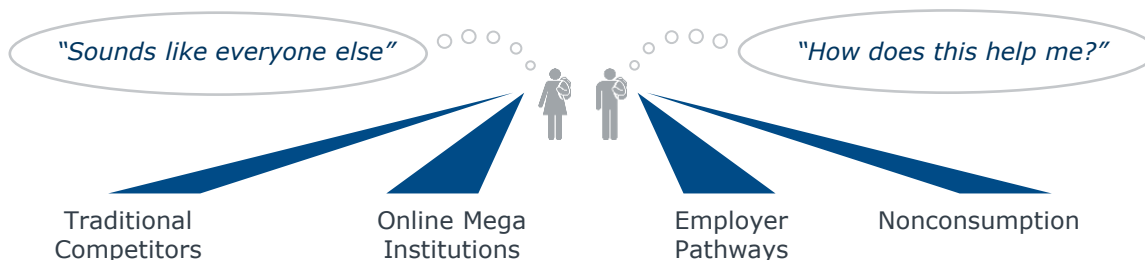
Traditions and Accolades

"Largest research university in a metropolitan setting"
"Oldest liberal arts college in the Plains States"
"Faculty with most industry experience"



Signature Initiatives

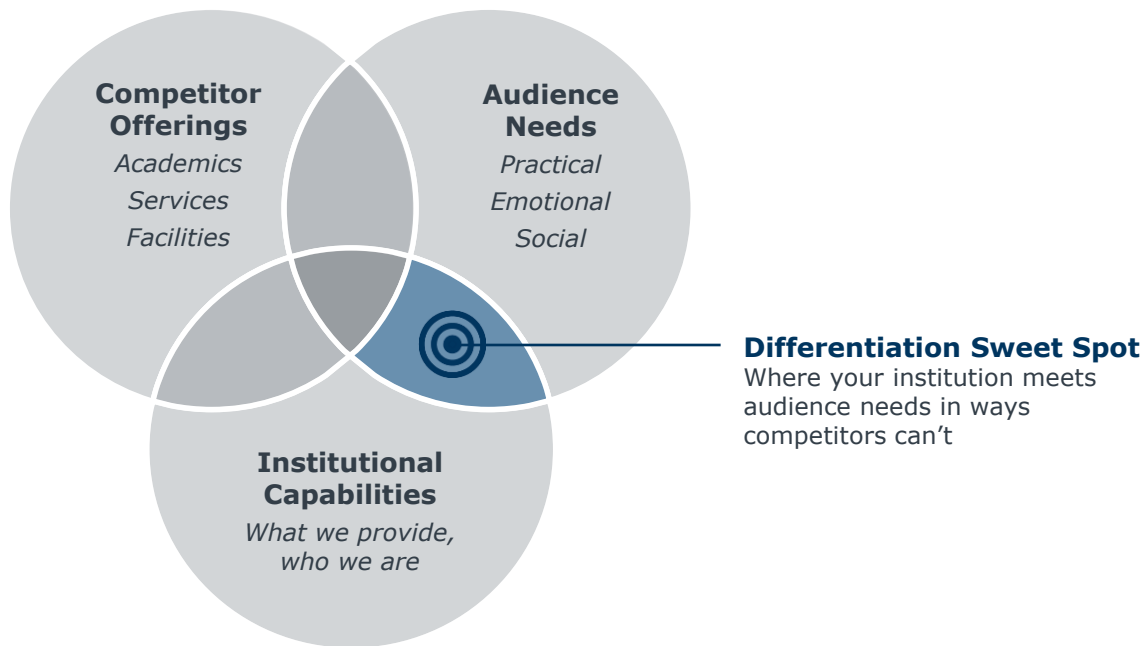
Experiential Learning
One-Stop Student Advising Center
Holistic Wellness Curriculum
Story Abroad Center in Italy



Focusing on Your Differentiation Sweet Spot

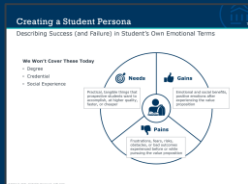


Industry Context: Demographics, Technology, Regulation



EAB's Principled Differentiation Workshop

Exercises to Clarify Your Unique Value Proposition



Creating a Student Persona

An exercise in “radical empathy” to itemize and rank practical, emotional, and social benefits students seek from your institution and the fears and frustrations they face

Our Focus for Today



Discovering and Ranking Potential Differentiators

Isolating which institutional attributes—*programs, services, values, location, pricing, etc.*—map to the most important student needs and challenges



Evaluating Differentiator Completeness

Stress test whether differentiators are valued by students, difficult to copy, experienced by the majority of students, and provable to the market

Reminder: Embrace self-critique today and take on the mindset of a savvy, skeptical prospective student. Pressure-test now to prevent future risk!

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Creating a Student Persona

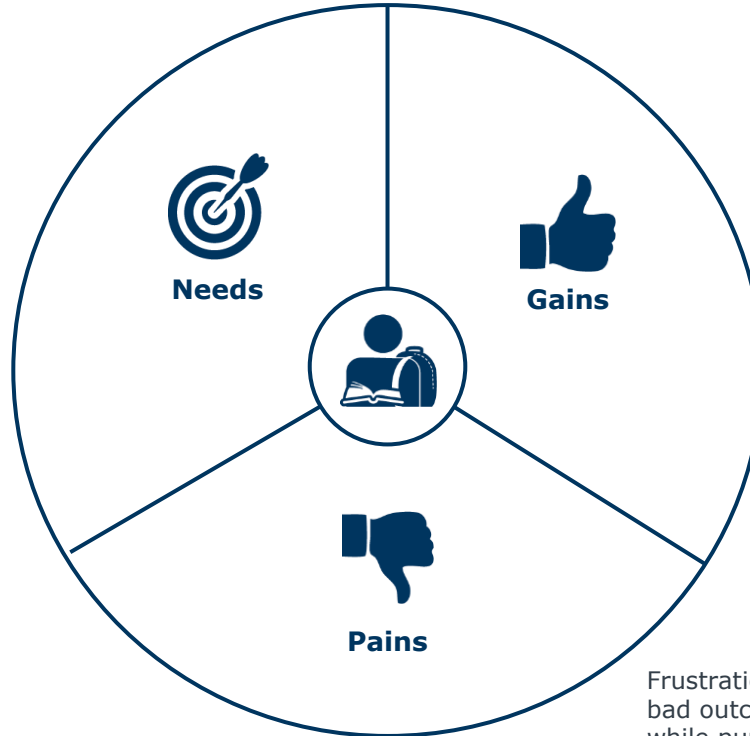
What Truly Drives Our Current (and Potential) Students?



Creating a Student Persona

Describing Success (and Failure) in Students' Own Emotional Terms

Practical, tangible things that prospective students want to accomplish, at higher quality, faster, or cheaper

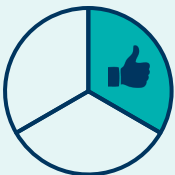


Emotional and social benefits, positive emotions after experiencing the value proposition

Frustrations, fears, risks, obstacles, or bad outcomes experienced before or while pursuing the value proposition

Describe Student Gains

Describing Success in Students' Own Emotional Terms



"Student Gains" describes the positive outcomes and benefits students want, both practical (such as cost savings), and social/emotional

What are the Gains that YOUR students seek?

Use These Prompt Questions to Help Think of Student Gains

- What positive emotions do students feel after receiving benefits of higher education?
- How do they define success? What do they dream of achieving?
- What kinds of savings make them happy? Which savings in terms of money, time, and effort do they value most? What makes them feel like a smart customer?
- How do they measure quality? What do they expect or want more of?
- What makes them look good to others? What increases their status or influence with family, friends, or peers?
- What reduces barriers to getting started? Investment costs? Administrative complexity?

Make Gains Concrete, in the Student's Voice

Sammy Stop-Out



- "I want to finish my degree as fast as possible"
- "I want to leverage my work experience for college credit"
- "I want to feel confident and prove to my family that I can be successful in college"
- "I'm excited to get qualified in a field with great job prospects"

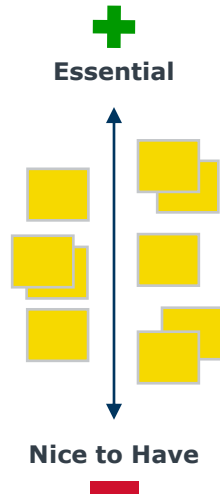
Exercise 1: Rank Gains Relevance

Describing Success in Students' Own Emotional Terms



“**Student Gains**” describes the positive outcomes and benefits students want, both practical (such as cost savings), and social/emotional

Step #2: Rank Gains from most to least relevant



Describe Student Pains

Describing Fears and Failure in Students' Own Emotional Terms



“Student Pains” describes barriers, frustrations, and annoyances students might encounter before, during, or after trying to accomplish the tasks and goals they want. Pains also describe risks, bad outcomes, and negative emotions from failing to fully accomplish their goals.

What are the Pains that YOUR students experience?

Use These Prompt Questions to Help Think of Student Pains

- What makes prospective or current students feel bad? What hassles or annoyances give them a headache?
- What are the difficulties and challenges they encounter? Do they understand how things work or have problems getting some things done, or are they resistant to some tasks?
- What common mistakes do students make? Are they using the products and services the wrong way?
- What negative social consequences do they fear? Are they afraid of a loss of face, trust, status?
- What barriers (costs, anxieties, learning curves) keep prospective students from trying college? How do students define “too costly”? Too much money? Too much time? Too much effort?

Make Pains Concrete, in the Student's Voice

Sammy Stop-Out



- “It’s too hard to study full-time”
- “I don’t want to lose previous college credits, but I’m scared I won’t remember what I learned”
- “I will be juggling a job while I attend school”
- “I’m nervous about taking on more debt”
- “I worry I’ll be the oldest student in the room”

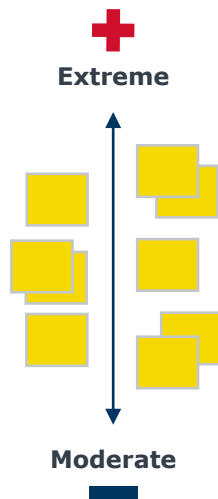
Exercise 2: Rank Pain Severity

Describing Fears and Failure in Students' Own Emotional Terms



Student Pains: Describe the barriers, frustrations, and annoyances your student persona may experience from your institution before, during, or after trying to accomplish their goal.

Step #2: Rank Pains from most to least severe



Tailoring Student Personas

Important Subpopulations Benefit from Nuanced Messaging

For Discussion: Ideally, strategy teams build personas for high-priority student subpopulations, recognizing that the pains and gains might meaningfully differ among diverse segments.

- ***Which does our enrollment strategy prioritize?***
- ***Do they have important Gains and Pains not addressed in our Student Persona?***



Nonconsumers

- Opportunity cost of college
- Turned off from education due to COVID



First-Generation

- Family pride being first to get degree
- Fearful of complex application process



Latine

- Concerned about fitting in on campus
- Reluctance to assume debt



Transfer

- Maximizing credit that will be transferred
- Minimize time and cost to degree



International

- Status in community and workforce back home
- Concerns about personal safety and visas



Working Adult

- Schedule flexibility
- Career advancement



Discovering and Ranking Your Differentiators

70+ Ways Your Institution Can Design a Differentiated Value Proposition

Distinctive Academics

- Program Variety
- Program Quality
- Unique Programs
- Stackable Credentials
- Flexible Delivery
- Flexible Scheduling
- Pedagogical Method
- Class Size

Distinctive Student Services

- Advising
- Mental Health
- Career Services
- Financial Aid Support
- Technology

Service Quality Levels

- Personalized Service
- One-Stop Service
- Concierge Service
- Peer-to-Peer Service

Student Experience

- Study Abroad
- Student Organizations
- Service Learning
- Athletics
- Co-Ops/Internships
- Facilities
- Student Research

Special Services for Target Students

- Targeted Demographics
- First-Generation
- Transfers
- Adult Learners
- International
- Special Needs
- Military

Student Outcomes

- On-Time Completion
- Student Debt
- Employment
- Earnings
- Awards and Recognition

Staff Characteristics

- Credentials
- Background
- Teaching Experience
- Industry Experience
- Technical Expertise
- Availability

Shared Values

- Sustainability
- Social Justice
- Community Service
- Wellness
- Outdoor Life
- Innovation

Distinctive Location

- Proximity
- Beauty and Climate
- Cultural Attractions
- Recreation Options
- Regional Economy

Partner Networks

- Alumni
- Community
- Employers
- Industries
- Global
- Research

Pricing

- Low Net Price
- Low Price Relative to Competitors
- Predictable Price
- Payment Options
- Need-Based Aid
- Merit Aid

Brand Character

- Exclusivity
- Quality
- Higher Purpose
- Value for Money
- Lifestyle
- Disruptive

Combine Differentiators Until You're *Really* Unique

Distinctive Academics

Program Variety
Program Quality
Unique Programs
Stackable Credentials
Flexible Delivery
Flexible Scheduling
Pedagogical Method

Distinctive Student Services

Advising
Mental Health
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Technology

Service Quality Levels

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Special Services for Target Students

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Staff Characteristics

Credentials
Background
Teaching Experience
Industry Experience
Technical Expertise
Availability

Shared Values

Sustainability
Social Justice
Community Service
Wellness
Outdoor Life
Innovation

Distinctive Location

Proximity
Beauty and Climate
Cultural Attractions
Recreation Options
Regional Economy

Partner Networks

Alumni
Community
Employers
Industries
Global

Pricing

Low Net Price
Low Price Relative to Competitors
Predictable Price
Payment Options
Need-Based Aid

Brand Character

Exclusivity
Quality
Higher Purpose
Value for Money
Lifestyle

“Compound” Value Propositions Are Viable (if Students Value Differentiators)

Student Services

Holistic success coaching



Service Quality

Peer, faculty, and
alumni mentor pairings



Brand Character

Exclusive networks in
desired career path

Multiple Levels of Differentiation

Envisioning a Full-Spectrum Messaging Strategy



Institutional Differentiators

Ring true for the vast majority



Programmatic Differentiators

Prioritized for competitive programs

Lib Arts

Sciences

Workforce

Business

CTE

Health

Online

Branch



Persona Messages

Emphasize audience characteristics

Urban

Rural

Employed

URM

Foreign

Adult

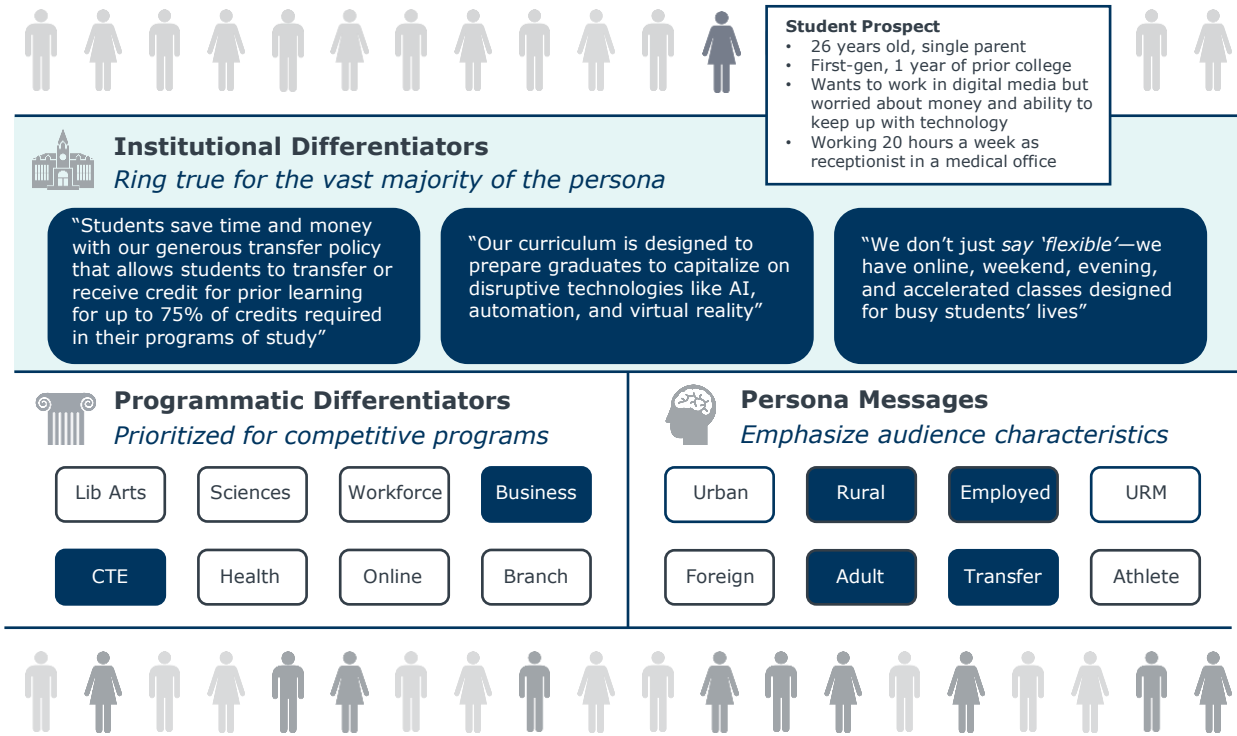
Transfer

Athlete



Multiple Levels of Differentiation

Illustrative Case Study



Exercise 3a & b

Brainstorming Your Institutional Differentiators

Identify **three differentiators** you would highlight to a prospective student from your persona who was deciding whether to come to your institution.

Next, consider how one of your top competitors would describe **their advantages over you** to that same prospective student.

Where Do We Go from Here?

Four Potential 'Buckets' Determine Next Steps for Each Differentiator

Differentiator 1

Differentiator 2

Differentiator 3

Differentiation Stress Test (Relevance, Difficulty to Copy, Share Participating, and Provability)



Promote

Demonstrable and ready for market

A few tweaks may be needed, but next step is to market and amplify



Refine

Lacking 1-2 key dimensions

Strategies require additional support and attention before public presentation



Invest

Promising but aspirational

Differentiator becomes a 2-5-year strategic priority, not an immediate win



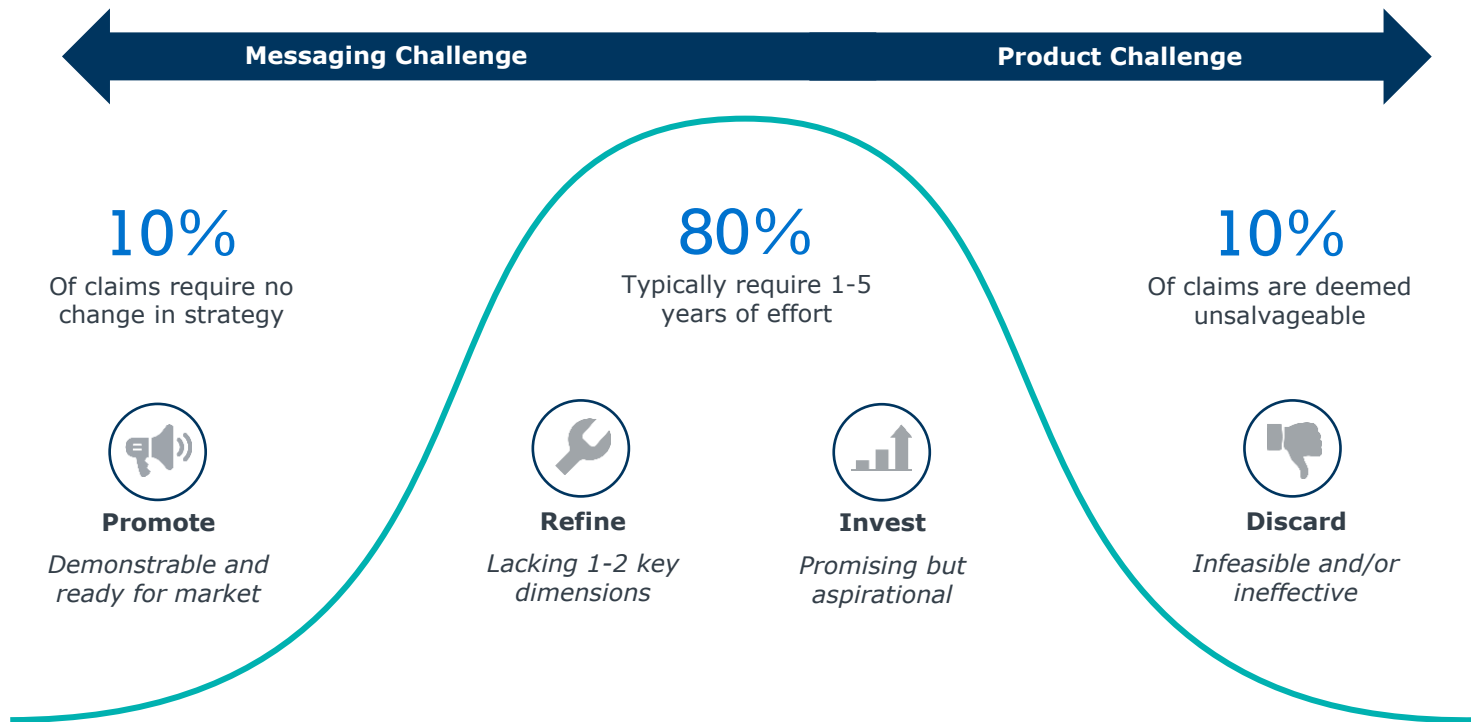
Discard

Infeasible and/or ineffective

Not worth scarce leadership time; investment won't bring desired return

Product vs. Messaging

In Our Experience Working with Institutions on Differentiation...



Exercise 3c

Prioritizing Next Steps

Put each of the differentiators that you assessed into one of the following categories:

- Promote
- Refine
- Invest
- Discard

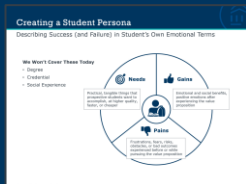
Exercise 4

Action Planning

- **Free Write for Two Minutes**
 - What opportunities do you see for your institution to leverage your differentiators to demonstrate your unique value proposition and become an “institution of choice” for your student persona?
 - Share one idea with the group.

EAB's Principled Differentiation Workshop

Exercises to Clarify Your Unique Value Proposition



Creating a Student Persona

An exercise in “radical empathy” to itemize and rank practical, emotional, and social benefits students seek from your institution and the fears and frustrations they face



Our Focus for Today

Potential Higher Education Differentiators
20+ Values Your Institution Can Design a Differentiated Value Proposition

Academic Excellence	Academic Success	Service Quality Leader	Student Experience
<ul style="list-style-type: none"> • Research • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning 	<ul style="list-style-type: none"> • Research • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning 	<ul style="list-style-type: none"> • Research • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning 	<ul style="list-style-type: none"> • Research • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning • Faculty • Student Learning

Discovering and Ranking Potential Differentiators

Isolating which institutional attributes—*programs, services, values, location, pricing, etc.*—map to the most important student needs and challenges

Evaluating Your Differentiators

Relevant to Students	Substantively Different
<ul style="list-style-type: none"> • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. 	<ul style="list-style-type: none"> • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges. • Differentiators are perceived as valuable and relevant to students' needs and challenges.

Evaluating Differentiator Completeness

Stress-test whether differentiators are valued by students, difficult to copy, experienced by the majority of students, and provable to the market

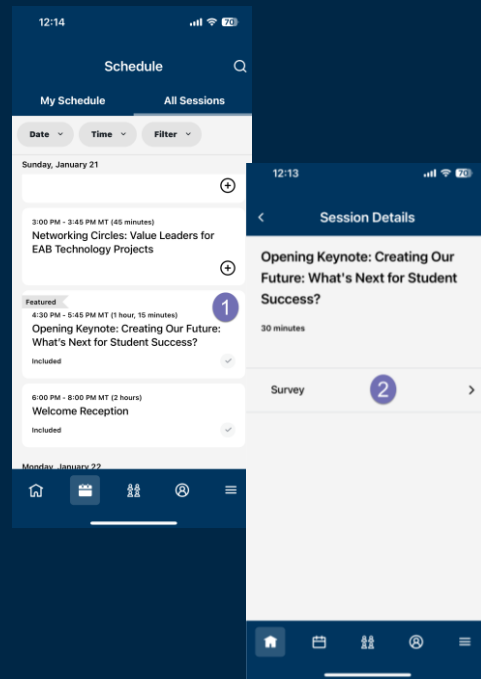
Complete Session Evaluations

Your feedback is important to us, please take a few moments to **tell us about your CONNECTED experience.**

Evaluations are available in the event app by clicking on a session and then clicking **Survey**.

Need help with the app?

Stop by the **information desk!**



CONNECTED24

Join us tonight for a
CONNECTED Celebration!



Join us at **5:00 p.m. in the Aurora Ballroom B-D** to celebrate with your colleagues and peers.

Bites, drinks, and fun provided





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