**TITLE**
Marketing Strategy for Expanding the Circulation Outreach of the *Rotman* Magazine 2008-2009

**OBJECTIVES**
- To expand the local and international outreach of the *Rotman* magazine
- To capitalize on the *Rotman* magazine as an important marketing tool for the Rotman School of Management
- To capitalize on the *Rotman* magazine as an important marketing tool for the Rotman academic programs of the University of Toronto

**CONTEXT**
The *Rotman* magazine is one of the few marketing and communications tools of the Rotman School of Management at the University of Toronto. Its existing circulation consists mainly of:
- Rotman alumni
- Past Rotman event attendees

There have been *ad hoc* marketing initiatives for the *Rotman* magazine, including:
- Print advertisements in *Fast Company* and *Conde Naste Portfolio* magazines
- Sending marketing e-mails to past Rotman event attendees to offer a complimentary of the *Best of Rotman* to entice readership and subscription
- 50%-off subscription discount campaign to requestors of the complimentary copy of *Best of Rotman*

There is an existing database of prospects for circulation expansion.  This database consists mainly of:
- Past Rotman event attendees
- Requestors of complimentary copy of *Best of Rotman*

The database of prospects needs to be exponentially increased and used to leverage a much wider outreach for the magazine.  Since the existing subscribers and prospects database are small, the marketing strategy to increase circulation has to be **heavily acquisition-focused**.
This is a 1-year strategy designed to pilot test a sample of outreach initiatives and marketing tools with a select number of target groups.

**TARGET AUDIENCE**
- Libraries: academic, public, corporate and specialized (business and management)
- End-users: Canada and International business students, researchers, consultants, entrepreneurs and decision makers – leveraged outreach via public and private organizations

**ISSUES**

There are some limitations that we are currently facing or will encounter in the long run:

- POS may require refinement
- Backend technological capacity associated with privacy issues & opt out options
- Lack of data sharing within Rotman and U of T and the lack of technological ability to integrate data across different platforms
- Limited marketing data and manipulation and analytical tools
- Costs: Various lacking resources vs limited budget for the year

**STRATEGIES**

The strategies are mostly acquisition-focused, and are designed to be implemented in phases, to avoid backend system overloading and to provide more opportunities to evaluate the existing strategies for modifications and refinement.

Phase 1 calls for tapping into our existing resources for prospects.

Phase 2 starts with the market with the largest readership outreach – libraries within Canada.  This target group helps build awareness for the magazine in the general public.

Phase 2 then continues with outreaching to a series of target groups with a need for business and management information for research, academic, professional development or publishing purposes.

Following direct mailing to the target groups using mailed hard copies magazines and e-mail teasers, the strategy calls for establishing partnerships with professional associations with memberships that can benefit from a subscription to the *Rotman* magazine.  Striking these partnerships can be labour intensive since relationship management is involved, hence a small number of relevant associations are chosen for the first year of the strategy.  Also, a promotional benefit is recommended for these associations to have a reason to partner with us.  The promotional benefit can be any one or a combination of the following:

- a small price discount on the subscription
- a complimentary *Best of Rotman* issue
- notifications and/or discounts to Rotman events

The last part of Phase 2 requires liaising with other Rotman departments for joint marketing opportunities.  We can then reach out to the wider network of U of T for event opportunities where the magazine can be marketed.

Phase 3 is a long-term maintenance initiative which can be operated depending on our circulation increase results.  It is to strengthen our backend operations to improve customers' sign up experience and our ability to protect, store, access and manipulate marketing data.

Evaluation opportunities are built into the end of each phase and in the middle and at the end of this 1-year strategy.

Evaluation mechanisms that match the various communications methods are built into each outreach initiative.

**Growth** - *Growing our existing client and prospect database to cross-market for Rotman events and magazine*

**G1.** Capitalize on the existing prospects database and contact those who have attended a Rotman event using a teaser matching up the topic they learned about with a past issue of the *Rotman* magazine with a related theme

**G2.** Capitalize on the existing prospects database and contact those who have requested a complimentary copy of *Best of Rotman*

**Acquisition** - *The acquisition strategy is phased to reach out to the following target audience groups according to a set schedule*

**A1.** Libraries – academic, public, corporate and specialized (business and management)

**A2.** International Business and Management Academic Institutions

**A3.** Management consulting agencies – Canadian and international leaders

**A4.** Public relations, government relations, marketing and advertising agencies – Canadian and international leaders

**A5.** Training and seminar development and delivering agencies – Canadian and international leaders

**A6.** Government – Canadian municipal, regional, provincial and federal levels

**A7.** Professional Associations of related discipline – Canadian leaders

**A8.** International academic and industry event participants and attendees

**A9.** University of Toronto event participants and attendees

**A10.** Research databases and content (re)distribution agencies

**Retention** - *For long-term management of customer information security and intelligence analysis*

**R1.** Make POS more user-friendly

**R2.** Make subscriber and prospect data more integrated across different online databases

**TACTICS**

**Growth**

**G1.** E-mail campaign directing past Rotman activity attendees to a past issue of the Rotman with a related theme, offering the option to mail them a complimentary of that hard copy issue if required > collect consent and encourage subscription

**G2.** E-mail follow up to *Best of Rotman* requestors to encourage subscription

**Acquisition**

**A1.** Purchase database of Canadian libraries – academic, public, corporate and specialized (business and management)
　　**List A1a:** Acquisition budgets to be over $50,000 p.a. = mail latest issue to a list of about **1,000** independent records
　　**List A1b:** Other public, academic, corporate and specialized libraries = an unlimited number > send e-mail teaser directing to online past issues and online subscription page

**A2.** International Business and Management Academic Institutions
　　**List A2a:** Mail latest issue to Top **100** MBA Schools + provide produce reproduction option
　　**List A2b:** Other business and management education institutions = an unlimited number > send e-mail teaser directing to online past issues + provide content reproduction option

**A3.** Management consulting agencies – Canadian and international leaders
　　**List A3a:** Mail to top **100** management consulting agencies + provide content reproduction option
　　**List A3b:** Other management consulting agencies = an unlimited number > send e-mail teaser directing to online past issues + provide content reproduction option

**A4.** Public relations, government relations, marketing and advertising agencies – Canadian and international leaders
　　**List A4a:** Mail to top **100** related consulting agencies + provide content reproduction option
　　**List A4b:** Other related consulting agencies = an unlimited number > send e-mail teaser directing to online past issues + provide content reproduction option

**A5.** Training and seminar development and delivering agencies – Canadian and international leaders
　　**List A5a:** Mail to top **100** related training agencies + provide content reproduction option
　　**List A5b:** Other related training agencies = an unlimited number > send e-mail teaser directing to online past issues + provide content reproduction option

**A6.** Acquire database of government libraries and offices – Canadian municipal, regional, provincial and federal levels

> **List A6a:** Mail to all offices to the Minister and Commissioner, Policy Branch Directors, Communications Branch Directors + provide content reproduction option (Estimated quantity = **1,200**)
>
> **List A6b:** Other government offices = an unlimited number > send e-mail teaser directing to online past issues + provide content reproduction option

**A7.** Professional Associations of related discipline – Canadian leaders

> **List A7a:** Negotiate partnership agreement with the top 20 management, accounting, operations and leadership associations + provide content reproduction option: suggest benefit of a complimentary of *Best of Rotman* for their members
>
> **List A7b:** Mail to all Canadian Boards of Trade and Chambers of Commerce = a list of about **1,500** independent records + provide content reproduction option

**A8.** Liaise with Program Marketing on international MBA events

> **List A8a:** Collect data on prospective Rotman MBA students send complimentary *Best of Rotman* offer e-mail
>
> **List A8b:** Collect information on international MBA fairs and include the latest issue / a past issue with a relevant theme / Best of Rotman into the delegate package and the workshop materials

**A9.** University of Toronto event participants and attendees:

> **List A9a:** Collect data on other University of Toronto event participants and attendees and send complimentary *Best of Rotman* offer e-mail
>
> **List A9b:** Collect information on other University of Toronto events and include the latest issue / a past issue with a relevant theme / Best of Rotman in the delegate package

**A10.** Negotiate agreements with content (re)distribution agencies – EBSCO, ProQuest, Thomson Gale, Access Copyright
- identify past and current use of *Rotman* content
- ensure we have rights and permission for content reproduction or (re)distribution
- produce content reproduction agreement and contracts
- ensure that we are on their list and receive royalties from content reproduction

**A11.** Professional publishers and information providers of business and management content

**Retention**
**R1.** Inefficiency identification, supplier and cost research to make POS more user-friendly

**R2.** Inefficiency identification, supplier and cost research for more integrated databases of marketing and prospect data

**TOOLS**

*Researched Data*
- Educational Institutions: World's Top 100 MBA Schools, other business and management education institutions
- Consulting Agencies: Management, public relations, government relations, marketing and advertising – Canadian and international leaders
- Training Program Suppliers: corporate training curriculum developers, seminar delivering agencies – Canadian and international leaders

*Purchased Lists*
- Canada libraries: academic, public, corporate and specialized (business and management)
- Professional Associations: including Boards of Trade and Chambers of Commerce
- Government departments and agencies: all levels and commissioned agencies

*In-house Data*
- University of Toronto event attendees
- University of Toronto business prospects
- Canadian and International MBA fair attendees

*Other External Research*
- Existing Rotman content in relation to content (re)distribution agencies

*Communications Tools*
- Customized e-mail teasers
- Customized letters for hard copy mailings
- Print copies mailing
- Promotional codes
- Professional partnerships for member benefit / promotional offers (e.g.: 1 subscription includes complimentary of Best of Rotman)
- Content reproduction agreement and contracts


**EVALUATION**
- December 2008: Strategy Evaluation and results analysis

- August 2009: Circulation audit – formal process conducted by third party professionals

**ROLES, RESPONSIBILITIES, RESOURCES & TIMELINES**

| TASKS | ROLES | RESPONSIBILITIES | TOOLS | RESOURCES | TIMELINES | CURRENT STATUS |
|---|---|---|---|---|---|---|
| *Growth* | | | | | | |
| G1: E-mail to past Rotman event attendees | Marketing Strategist | E-mail production E-mail distribution Online sign up portal Stuffing for mailing | Data Hard copy mailing: BOR Cover letter | Stuffing Mailing | 08/2008 – (quarterly) | Ongoing Round 1 done 08/2008 |
| G2: E-mail follow up to *BOR* requestors | Marketing Strategist | E-mail production E-mail distribution | Data E-mail | NIL | 08/2008 – (bi-monthly) | Ongoing Round 2 done 08/2008 |
| *Acquisition* | | | | | | |
| A1a: Canadian libraries - Mail latest issue | Marketing Strategist | Purchase list Stuffing for mailing Est. 1,000 hard copies | List New mags for 1,000 contacts Cover letter E-mail follow up Phone follow up | **$350** for list Stuffing Mailing | 09/2008 Wk 3 10/08 Wk 4 10/08 | Mailed 1,153: approx. 850 *All-Consuming* and 300 *Quest* 09/2008 Emailed 10/2008 Called Top 10 11/2008 |
| A1b: E-mail Canadian libraries | Marketing Strategist | E-mail production E-mail distribution | Data E-mail | NIL | 09/2008 | Emailed 1,561 contacts 09/2008 E-mailed Follow-up: 10/17/2008 |
| A2a: Top 100 MBA schools (intl.) | Marketing Strategist | Research 100 hard copies Stuffing for mailing | Data New mags for **100** contacts Cover letter | Data entry Stuffing Mailing | 10/2008 | Research Completed 11/15/2008 ==Cross-referencing with Ken 11/2008== |
| A2b: Other business schools | Marketing Strategist | E-mail production E-mail distribution | Data E-mail | NIL | 10/2008 | Research underway 10/2008 |
| A3a: Mail Top 100 intl. | Marketing | Research | Data | Data Entry | 11/2008 | Research |

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|---|---|---|---|---|---|---|
| management consulting agencies | Strategist & Rotman Marketing | 100 hard copies Stuffing for mailing Content reprod. Agmt. | New mags for **100** contacts Cover letter Content reprod. Agmt. | Stuffing Mailing | | completed 12/04/2008 |
| A3b: E-mail intl. management consulting agencies | Marketing Strategist | E-mail production E-mail distribution | Data E-mail | NIL | 11/2008 | Emailed 12/2008 |
| A4a: Mail top 100 intl. communications and public affairs agencies | Marketing Strategist | Research 11 hard copies Stuffing for mailing Content reprod. agmt | Data New mags for **100** contacts Cover letter Content reprod. Agmt. | Data Entry Stuffing Mailing | 01/2009 | Research completed 12/04/2008 |
| A4b: E-mail intl. communications and public affairs agencies | Marketing Strategist | E-mail production E-mail distribution | Data E-mail | NIL | 01/2009 | |
| A5a: Mail top 100 intl. training agencies | Marketing Strategist | Research 100 hard copies Stuffing for mailing Content reprod. agmt | Data New mags for **100** contacts Cover letter Content reprod. Agmt. | Data Entry Stuffing Mailing | 02/2009 | Mailed 35 *Future of Capital* 09/2008 E-mailed follow-up: 10/10/2008 |
| A5b: E-mail intl. training agencies | Marketing Strategist | E-mail production E-mail distribution | Data E-mail | NIL | 02/2009 | |
| A6a: Mail govt office leaders | Marketing Strategist | Purchase list Est. 1,200 copies Stuffing for mailing Content reprod. agmt | List New mags for **1,200** contacts Cover letter Content reprod. Agmt. E-mail follow up post-mail E-mail follow up pre-fiscal | **$350** for list Stuffing Mailing | 03/2009 End 10/08 02/2009 | Mailed 1,010 *Thinking About Thinking* 09/2008 E-mailed follow-up: 10/10/2008 Called 11/2008 |
| A6b: E-mail govt offices | Marketing Strategist | E-mail production E-mail distribution | Data E-mail E-mail follow up post-mail E-mail follow up pre-fiscal | NIL | 03/2009 End 10/08 02/2009 | E-mailed 5,445 directors 09/2008 E-mailed Follow-up: 10/25/2008 Called 11/2008 |

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|---|---|---|---|---|---|---|
| A7a: Partnership with 20 professional associations | Marketing Strategist & Rotman Marketing | Research 40 copies BOR for subscribers Stuffing for mailing Content reprod. agmt | Data New mags for **20** contacts Cover letter Partnership contract Content reprod. Agmt. | Mailing Promotional benefit | 04/2009 | |
| A7b: Mail to BoTs & CoCs; business, mgnt, leadership & enterprise orgs; unions; trade councils; guilds; alliances | Marketing Strategist | Purchase list Est. 1,500 copies Stuffing for mailing Content reprod. agmt | List New mags for **1,500** contacts Cover letter Content reprod. Agmt. E-mail follow up post-mail E-mail follow up pre-xmas | **$350** for list Stuffing Mailing | 04/2009 Wk3 10/08 Wk 2 11/08 | Mailed 998 + 273 = 1,271 *All-Consuming*; 295 + 4 + 6 = 305 *Future of Capital* 09/2008 E-mailed follow-up: 10/10/2008 Called 11/2008 |
| A8a: Mail BOR to Rotman MBA prospects | Marketing Strategist & Program Marketing | Liaison with Program | Data Hard copy mailing: New Cover letter | TBA | 05/2009 | |
| A8b: Include mag or BOR into delegate pkgs of intl MBA fairs | Marketing Strategist & Program Marketing | Liaison with Program Marketing | Hard copy mags: relevant theme | TBA | 05/2009 | |
| A9a: BOR E-mail to UofT event participants | Marketing Strategist & UofT depts | Liaison with various UofT depts | Data E-mail | TBA | 06/2009 | |
| A9b: Hard copy mag in UofT event delegate packages | Marketing Strategist & UofT depts | Liaison with various UofT depts | Hard copy mags: relevant theme | TBA | 06/2009 | |
| A10: Agmts with content redistribution agencies | Marketing Strategist & Rotman | Research Contract Negotiation | E-mail Letters Contract | NIL | 07/2009 | Research completed 10/2008 |

| | Marketing | | | | | |
|---|---|---|---|---|---|---|
| A11: Business info provider and publisher | Marketing Strategist & Rotman Marketing | Research Est. 60 copies Stuffing for mailing Content reprod. agmt | Hard copy mags: Quest E-mail Letters Contract | Data Entry Stuffing Mailing | 10/2008 | Research Complete: 10/17/2008 Cross-referenced with Ken 11/28/2008 Mailing Complete 11/28/2008 Called wk 1 Dec |
| *Retention* | | | | | | |
| R1: Make POS more user-friendly | Marketing Strategist & Rotman Marketing | Research Contract Negotiation Implementation Training | TBA | TBA | 08/2008 – | |
| R2: Enhancing prospect and subscriber database | Marketing Strategist & Rotman Marketing | Research Contract Negotiation Implementation Training | TBA | TBA | 08/2008 – | |
| Semi-annual evaluation | Marketing Strategist & Rotman Marketing | Data analysis | Subscription data | NIL | 12/2008 | |
| Circulation Audit | Marketing Strategist & Third Party Supplier | Formal auditing process | Circulation audit docs | $500+ | 08/2009 | |
| | | | | | | |
| **TOTAL** | | | Hard copies of BOR | Additional | | |
| | | | Hard copies of new issues | 4000+ | | |
| | | | List costs | $350 each list 2 lists: -5% | | |

| | | | | @ <br> 3 lists: -10% <br> @ | | |
|---|---|---|---|---|---|---|
| | | | Stuffing | Additional | | |
| | | | Mailing | Additional | | |

# CRITICAL PATH

| Phase 1: Current / Completed Initiatives: X | Phase 2: Strategically Aligned Initiatives | Phase 3: Result Dependent Initiatives |
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| MONTH | Aug-08 | | | | Sep-08 | | | | Oct-08 | | | | Nov-08 | | | | Dec-08 | | | | Jan-09 | | | | Feb-09 | | | | Mar-09 | | | | Apr-09 | | | | May-09 | | | | Jun-09 | | | | Jul-09 | | | | Aug-09 | | | |
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| **G1** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Research | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Distribution | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **G2** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| Distribution | | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Tech. Rsch.** | | | X | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **Evaluation** | | | | | | | | | | | | | | | | | | █ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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| Stuffing | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| MONTH | Aug-08 | | | | Sep-08 | | | | Oct-08 | | | | Nov-08 | | | | Dec-08 | | | | Jan-09 | | | | Feb-09 | | | | Mar-09 | | | | Apr-09 | | | | May-09 | | | | Jun-09 | | | | Jul-09 | | | | Aug-09 | | | |
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| **R2** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| **Circ. Audit** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | ███ | ███ | ███ | ███ |

**RISKS**

ROI: Since the hard costs are limited to additional talents required for the project-based responsibilities, instead of third-party advertising, costs are kept low and hence a relative lower risk with the ROI.

Technological Capacity: There may be peaks and valleys of sign up periods.  Since this plan spaces out major campaigns into separate periods, this can help spread out the load of the backend transaction system.  However, there is a risk that the backend data becomes too big for our manual manipulation, at which point we may have consider deploying some data analytical tools such as **SAS 9.1.3** which U of T has a contract covering an unlimited number of users for staff, faculty and students.  The department charge for 1 licence is $110.

**SIGN OFF**

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|---|---|---|
| Drafted by | Anna Victoria Wong | 08/12/2008 |
| Approved by | Jennifer Hildebrandt | |
| Approved by | Karen Christensen | |
| Approved by | Steven Arenburg | |