



# WPI

## WPI Project Engagement Portal Marketing Plan

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# Executive summary

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Worcester Polytechnic Institute (WPI) students frequently conduct **surveys** as part of the university's project-based learning curriculum. To facilitate high-quality data collection, the **WPI Project Engagement Portal (PEP)** allows students to post surveys and respond to surveys from their peers. The WPI PEP requires a marketing strategy to establish an active user base.

The portal's **main competitors consist of survey distribution channels** used by WPI students, including email, text messaging, physical advertisements, and social media. The competitive success of the portal relies on convincing students to choose the WPI PEP as their preferred method of survey distribution. To do so, the marketing campaign must leverage the portal's strengths and unique features.

The WPI PEP's **target audiences are undergraduate and graduate WPI students**. Undergraduate students typically have an interest in STEM, thrive in fast-paced and hands-on environments, and display common characteristics of Generation Z. Graduate students are also interested in STEM, exhibit ambition and academic curiosity, and display common characteristics of older members of Generation Z and millennials. With these audiences in mind, the marketing campaign intends to achieve the following goals:

- Get students to post surveys on the WPI PEP
- Get students to respond to surveys on the WPI PEP
- Enable professors to be advocates for the WPI PEP

To convince students to post and respond to surveys, the WPI PEP team will create physical and digital **advertisements**, a biweekly WPI PEP **newsletter**, and an **informational seminar** for students. A group of **WPI PEP Student Ambassadors** will assist with running promotional events, including **table-sitting** sessions and **live events** such as survey workshops and guest speaker presentations. A monthly **gift card raffle** where one WPI PEP survey response is equivalent to one raffle entry will further entice students to respond to their peers' surveys.

To enable professors to serve as advocates for the WPI PEP, the WPI PEP team will offer an **informational seminar** about the portal for faculty members. The team will also form **partnerships with professors** of research-centric courses to integrate the WPI PEP into course curriculums. Promotional material and live events will **showcase professors' research** to emphasize the importance of primary data collection within the WPI community.

Contingency plans account for low initial adoption rates from students, low faculty engagement, and prolonged technical issues. The marketing campaign's budget should be \$1,446.50 each year to support effective promotional outreach. Adherence to the proposed schedule is essential to ensure efficient planning and consistent promotion.

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# Situation analysis

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WPI is a leader in **project-based learning (PBL)** among educational institutions. The university implemented the WPI Plan in 1970, where “students [apply] knowledge and skills from the classroom to real problems around the world” through project work (“10 Things to Know...,” n.d.). While PBL’s role in WPI’s curriculum is best exemplified through the mandatory Interactive Qualifying Project (IQP), Major Qualifying Project (MQP), and humanities seminar or practicum (HUA), standard courses also incorporate PBL. PBL aims to strengthen students’ problem-solving skills, reinforce the importance of collaboration, and demonstrate the interdisciplinary connection between STEM and the humanities.

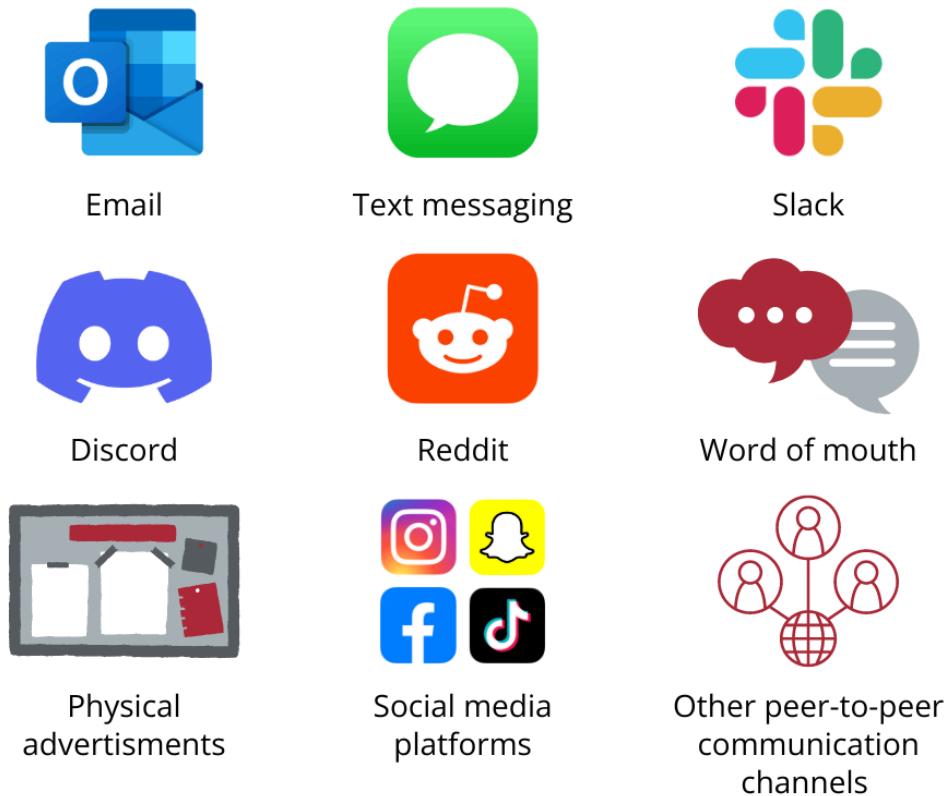
**Student projects frequently involve surveys** that aim to obtain primary data about their peers' opinions, behaviors, and characteristics. **Collecting a sufficient amount of high-quality data can be difficult for students due to the lack of a centralized survey distribution channel.** Asking members of pre-existing group chats to participate in a survey generates **undesirable off-topic clutter** in social spaces. The request may be skimmed over by uninterested readers or buried within other topical conversations. Pre-existing group chats often consist of surveyors’ friends or colleagues, which can potentially lead to **selection bias** in the data. Participants may also feel **pressured to provide socially acceptable or desirable answers** and avoid controversial responses when surveyed by friends or acquaintances (Zerbe & Paulhus, 1987).

The **WPI Project Engagement Portal (WPI PEP)** facilitates survey distribution and alleviates the risk of incorporating biased or otherwise low-quality data into student projects. The WPI PEP allows students to collect high-quality data and contribute to their peers’ academic endeavors. Students can post links to their surveys on the portal and respond to surveys from their peers. **Without an active user base that both posts and responds to surveys, the WPI PEP would be impracticable and unviable.**

This marketing plan offers suggestions on how to promote the WPI PEP to the student body. By implementing the strategic marketing initiatives outlined in this plan, we will enable widespread adoption of the WPI PEP and facilitate survey distribution for members of our community.

## Competitive environment

The WPI PEP's main competitors are not survey creation tools such as Microsoft Forms, Google Forms, Qualtrics, or SurveyMonkey. Instead, **the portal's competitors are survey distribution channels used by WPI students.** These channels include:



While we want to encourage students to primarily utilize the WPI PEP in order to address the challenges associated with sourcing participants from pre-existing group chats—including unwanted clutter, selection bias, and social pressure—students retain the option to use multiple survey distribution channels in addition to the WPI PEP. This means that the competitive success of the portal relies on convincing students to choose the WPI PEP as their preferred method of survey distribution.

Understanding the competitive landscape helps us assess the strengths, weaknesses, opportunities, and threats faced by the WPI PEP.

## SWOT analysis

### Strengths

- The prevalence of WPI courses and projects that require or recommend peer surveys as a research tool means that **many students would potentially utilize the portal**
- A WPI-affiliated portal has a more **credible** reputation than a third-party website
- Students can use the WPI PEP **along with other means of survey distribution** (i.e., posters, group chats, etc.)

### Weaknesses

- Students are **more likely to use the portal to post their own surveys** than to take the time to respond to others' surveys
- The WPI PEP only provides links to existing surveys; it **doesn't allow users to build a survey** on the portal
- The portal's success solely relies on whether it is adopted and **consistently used** by members of the student body

### Opportunities

- **Collaborating with faculty members** to incorporate the WPI PEP into course curriculums could increase utilization
- **Integrating the portal with existing WPI resources** such as Canvas or eProjects could streamline the data collection process
- Continuously **improving and expanding** the functionality of the WPI PEP could attract additional users

### Threats

- The **accessibility** of other survey distribution channels (i.e., text messaging, email, social media, etc.) may limit utilization of the portal
- Students may not want to respond to surveys unless it **personally benefits** them
- **Limited adoption** of the WPI PEP would negatively impact the effectiveness and sustainability of the portal

Overall, the WPI PEP's strengths and opportunities indicate that the portal has the **potential to become a valuable and popular resource** within the WPI community. Addressing the weaknesses and threats by offering **transparent communication** and frequent **technological updates** will ensure the successful adoption of the portal by the WPI student body.

# Target audience analysis

The WPI PEP's target audiences consist of **undergraduate WPI students** and **graduate WPI students**. Although these groups share similar characteristics such as an interest in STEM, their geographic, demographic, behavioral, and psychological traits set them apart.



## Undergraduate WPI students

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### Geographic

- Most underclassmen live on-campus while most upperclassmen live off-campus
- Many are from Massachusetts or New England

### Demographic

- Typically between the ages of 18 and 22
- Majority (65%) are male, 35% are female
- 63.6% identify as white, 27.2% belong to minority groups

### Psychological

- Interested in STEM
- Fast learners who thrive in fast-paced environments (such as the 7-week term system)
- Most participate in an on-campus club or sport

### Behavioral

- Innovative and interested in new technologies
- Prefer collaborative, hands-on experiences
- Display common characteristics of Generation Z: proficient with technology, value authenticity, and seek personalized experiences

## Graduate WPI students

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### Geographic

- Most either live on-campus or commute
- Many (39%) are from outside of the United States, primarily India and China

### Demographic

- Typically between the ages of 22 and 29
- Majority (67.5%) are male, 32.5% are female
- 39% identify as white, 14.6% belong to minority groups

### Psychological

- Interested in STEM
- Typically exhibit ambition, strong problem-solving skills, and intellectual curiosity
- Many hold research or teaching positions

### Behavioral

- Innovative and interested in new technologies
- Display common characteristics of millennials and older members of Generation Z: seek occupational fulfillment and value autonomy

To further understand how undergraduate and graduate students may differ, let's examine some **personas**: hypothetical depictions of individuals within our target audiences. These personas help us understand consumer preferences by **combining target audience traits with a touch of individuality**.



### The Busy Senior

**Name:** Jacob

**Gender:** Male

**Age:** 21

**Hometown:** Haverhill, MA

**Year and Major:** Senior computer science major

- Very involved on campus, including a varsity sports team, a fraternity, and multiple clubs
- Trying to spend as much time as possible with his friends before graduation
- Conducting a survey for his HUA seminar about WPI students' favorite musical artists

Jacob uses the WPI PEP to reduce the time it takes to distribute his HUA survey. Now, he has more time and energy to focus on his friends and on-campus involvement!



### The Learning Freshman

**Name:** Anya

**Gender:** Female

**Age:** 18

**Hometown:** Orlando, FL

**Year and Major:** Freshman civil engineering major

- Overwhelmed by the transition to college, especially all of WPI's websites and resources
- Tends to ask a lot of questions
- Currently taking a GPS where her team wants to survey fellow WPI students about their recycling habits

Anya is initially apprehensive about trying out the WPI PEP. She decides to attend an informational session about the portal, where the presenter answers all of her questions. Now, Anya feels confident that the WPI PEP is just what her team needs to distribute their survey!





## The Helpful TA

**Name:** Lucy

**Gender:** Female

**Age:** 23

**Hometown:** Albany, NY

**Year and Major:** Graduate robotics engineering student

- Recently earned her bachelor's degree in robotics engineering from WPI
- Used the WPI PEP to distribute a survey for her IQP
- Works as a teaching assistant for an undergraduate robotics course, where the students must conduct a survey to determine their design

Lucy shows her students the WPI PEP and explains how it can help them distribute their surveys just like it helped her during her IQP!



## The Group Leader

**Name:** Krish

**Gender:** Male

**Age:** 26

**Hometown:** Bengaluru, India

**Year and Major:** Graduate data science student

- Tends to be an early adopter of new products, especially technology
- Takes on the "leader" position in group projects
- Currently working on a project with 3 older students who do not keep up to date with WPI news

Krish introduces his group mates to the WPI PEP, which they had heard of but were not very familiar with. After hearing Krish's explanation, the group is on board with using the portal to distribute their survey!

# Goals and objectives

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The following goals are meant to guide the marketing strategy and tactics of the WPI PEP. Each goal is accompanied by corresponding objectives that offer clear benchmarks for success and direction.

Goals	Objectives
<b>1.</b> Get students to post surveys to the WPI PEP	<b>1A.</b> Publish at least 6 new advertisements per term
	<b>1B.</b> Collect at least 8 student testimonials and pieces of user-generated content (UGC) per year that highlight the benefits of the WPI PEP to use in advertising campaigns
	<b>1C &amp; 2C:</b> Form a WPI PEP Student Ambassadors organization to promote the portal among the student body
<b>2.</b> Get students to respond to surveys on the WPI PEP	<b>2A.</b> Increase survey participation by 50% using tangible rewards
	<b>2B.</b> Ensure that 70% of students respond to at least 1 survey per term by the end of the WPI PEP's third year
<b>3.</b> Enable professors to be advocates for the WPI PEP	<b>3A.</b> Educate professors on how the WPI PEP works and how to best assist students with the portal
	<b>3B.</b> Partner with at least 2 professors of research-intensive courses (i.e., GPS or ID 2050) to integrate the WPI PEP into the curriculum
	<b>3C.</b> Platform at least 2 professors to showcase their survey-related research per year

# Marketing tactics

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Goals 1 & 2: Get students to post and respond to surveys on the WPI PEP

## Advertising and awareness campaign

The advertising and awareness campaign will consist of messages, infographics, and videos explaining the WPI PEP, highlighting the portal's beneficial aspects, or encouraging students to post and respond to surveys.

Advertisements for the WPI PEP should emphasize its value to all students, whether they post surveys, respond to surveys, or both. For survey posters, the value of the WPI PEP resides in its role as a centralized platform for reaching fellow students and garnering survey responses. For survey respondents, the portal's value lies in assisting their peers with research and contributing to academic initiatives across the student body.

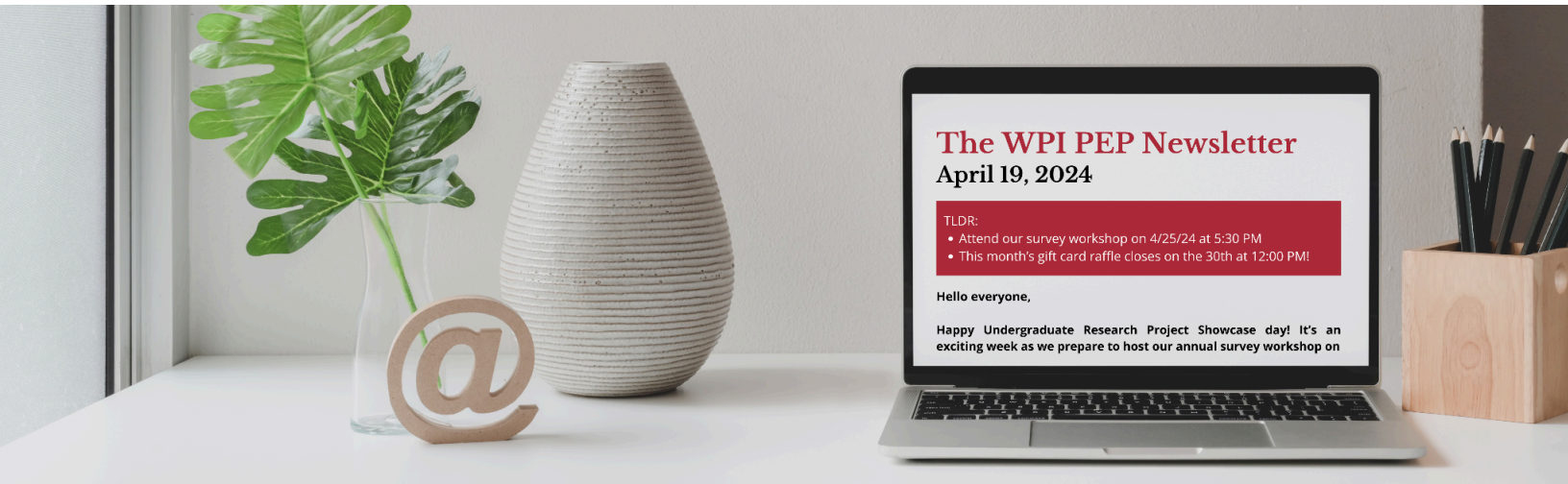
### Channel:

- Email (sent to all WPI undergraduate and graduate students)
- WPI's social media accounts: Instagram, Facebook, X (formerly Twitter), and TikTok
- Signage posted on bulletin boards and screens throughout campus, especially high-traffic areas such as Unity Hall, the Campus Center, and Innovation Studio

### Consistency:

- Email: 3 issues of the biweekly "WPI PEP Newsletter" per term
- Social media: 2 new posts per term—the WPI PEP Team should aim to create content that can be posted on at least 2 social media channels
- Signage: 1 new physical or digital poster per term

**Goals 1 & 2:** Get students to post and respond to surveys on the WPI PEP



## WPI PEP Newsletter

The WPI PEP Newsletter will be a biweekly newsletter sent to all undergraduate and graduate students. The newsletter will provide useful information and tips about the portal, highlight surveys that need responses, promote the monthly raffle and any upcoming informational seminars or events, and showcase student testimonials and user-generated content.

**Channel:** Email

**Consistency:** Every other week

**Goals 1 & 2:** Get students to post and respond to surveys on the WPI PEP



## WPI PEP Student Ambassadors

The WPI Student Ambassadors program should consist of highly involved students who will promote the WPI PEP to the student body. Ambassadors will assist with organizing, promoting, and running promotional events and developing content for advertisements.

The program should be open to all WPI students. To recruit ambassadors, the program will be advertised to students via email, WPI social media accounts, and signage around campus. Students will be able to apply to join the organization by filling out a form. The form will consist of the following questions:

1. What is your grade level? (First-year, sophomore, junior, senior, or graduate)
2. What clubs and organizations are you involved with on campus? Please include if you currently or previously have held any leadership positions.
3. Have you used the WPI PEP to post or respond to surveys before? If so, what for?
4. Why are you interested in becoming a WPI PEP Student Ambassador?

Based on form responses, at least 10 ambassadors should be appointed to ensure sufficient representation across student communities. Ambassadors should be encouraged to promote the WPI PEP, table-sitting sessions, and live events to their peers and members of organizations that they are a part of as much as they see fit.

**Channel:** N/A

**Consistency:** Ambassador meetings will occur once per week

**Goals 1 & 2:** Get students to post and respond to surveys on the WPI PEP



## Table-sitting sessions

WPI PEP Student Ambassadors will set up a booth in the Campus Center or by the fountain to promote the WPI PEP and answer any questions about it. Free snacks, merchandise (including WPI Superfan t-shirts and WPI PEP stickers/pens), and informational flyers about the portal will be offered to attract students who pass by.

**Channel:** N/A

**Consistency:** Once per term

**Goals 1 & 2:** Get students to post and respond to surveys on the WPI PEP



## Live events

The WPI PEP Student Ambassadors will work alongside the WPI PEP team to organize live promotional events. Ambassadors should be encouraged to brainstorm creative event ideas that may entice students to attend. Examples of possible events include guest speaker sessions featuring professors or researchers who have conducted interesting surveys, workshops on how to optimize surveys, or interactive sessions on survey analysis techniques. Free snacks and merchandise (including WPI Superfan t-shirts and WPI PEP stickers/pens) will be offered at these events to attract participants. Informational flyers with details about the WPI PEP should be available to attendees.

**Channel:** N/A

**Consistency:** Once per term

**Goals 1 & 2:** Get students to post and respond to surveys on the WPI PEP



## Informational seminar for students

This seminar will teach students about the purpose and benefits of the WPI PEP, show them how to use the portal to post and respond to surveys, and answer any of their questions.

### Channel:

- In-person live session accompanied by a PowerPoint presentation (an online option should be available via Zoom)
- A recording of the session will be sent to students via the WPI PEP Newsletter and accessible via the WPI PEP

**Consistency:** Once per academic year, preferably in A term



**Goal 2:** Get students to respond to surveys on the WPI PEP



## Gift card raffle

Every time a student responds to a survey on the WPI PEP, they should be entered into a monthly raffle. Each response should count as one raffle entry to encourage students to respond to multiple surveys for a greater chance of winning. Prizes will consist of \$25 gift cards to stores and services that are popular among college students, such as Starbucks, Dunkin', Amazon, DoorDash, Uber, Target, and Chipotle. At the end of the month, one winner will be selected and highlighted in the WPI PEP Newsletter. The gift card raffle will commence in September and end in August, so there will be 8 raffles per academic year.

**Channel:** The gift card raffle will be promoted in advertisements (including the WPI PEP Newsletter), table-sitting sessions, live events,

**Consistency:** Once per month

**Goal 3:** Enable professors to be advocates for the WPI PEP



## Informational seminar for professors

This event will teach professors about the purpose and benefits of the WPI PEP, show them how to assist students with the portal, and answer any of their questions.

**Channel:**

- In-person live session accompanied by a PowerPoint presentation (an online option should be available via Zoom)
- A recording of the session will be sent to professors via email and accessible via the WPI PEP

**Consistency:** Once per academic year, preferably in A term

**Goal 3:** Enable professors to be advocates for the WPI PEP



## Professor partnerships

The WPI PEP Team should partner with professors of research-intensive courses, such as the Great Problems Seminar (GPS) or ID 2050, to integrate the WPI PEP into the course curriculum. This may involve teaching the students about the WPI PEP during class or requiring students to post a survey for the course to the portal. To develop these partnerships, the WPI PEP Team should reach out individually to GPS professors, ID 2050 professors, or any other professors who may be willing to participate via email.

**Channel:** Undergraduate and graduate courses

**Consistency:** Seek out at least 2 partnerships during the first year and an additional professor each year that follows

**Goal 3:** Enable professors to be advocates for the WPI PEP



## Professor research spotlights

For live events that include guest speaker sessions, the WPI PEP Team and the WPI PEP Student Ambassadors should reach out to professors who are either familiar with survey design, distribution, and analysis or have conducted an interesting survey. Platforming WPI professors emphasizes the importance of surveys within the community and may attract students who admire these professors.

**Channel:**

- In-person live session in a lecture hall with at least 100 seats (an online option should be available via Zoom)
- A recording of the session will be sent to students via the WPI PEP Newsletter

**Consistency:** At least once per academic year

# Implementation controls

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## Contingency plans

The following contingency plans address the most plausible **potential obstacles** that would necessitate deviations from the intended marketing plan.

**Low initial adoption rate during the first year:** Although it is unlikely that the WPI PEP will be an instant success, we expect at least 10 surveys will be posted on the portal per month during its first year (excluding A term and summer months). If that is not the case, additional marketing efforts should be implemented:

- The “WPI PEP Newsletter” should become a **weekly** publication
- Conduct a **survey** to collect feedback about the WPI PEP to determine how the portal can be better presented to the student body
- Explore offering **incentives for posting surveys**, such as a separate gift card raffle
- **Increase** the amount of promotional signage around campus and promotional social media posts

**Low faculty engagement:** If professors are hesitant to promote or integrate the WPI PEP into their courses, **personalized outreach efforts** can be made to address their concerns and demonstrate how the portal can facilitate the survey distribution process. This may include utilizing **testimonials** from students or members of the WPI PEP Student Ambassadors program. Additional resources for professors, such as a **dedicated WPI PEP newsletter for faculty members**, should also be implemented.

**Technical issues:** If the WPI PEP experiences an unexpected and prolonged technical issue, **promotional activities should be paused until the issue is solved**. Major updates on the portal’s state should be communicated via the WPI PEP’s landing page.

## Itemized budget

This budget represents the expected **annual cost** for the WPI PEP marketing campaign. The WPI PEP team should be allotted the total cost (\$1,446.50) each year to ensure effective promotional outreach.

Initiative	Item	Cost per item	Quantity	Total cost
Printing (physical ads)	Poster	\$0.60	40	\$24.00
	Informational flyer	\$0.30	75	\$22.50
Raffle	Gift card	\$25.00	8	\$200.00
Live events	Food & merchandise	\$200.00	4	\$800.00
Table sitting	Food & merchandise	\$50.00	4	\$200.00
<b>Total cost:</b>				\$1,446.50

# Schedule

The following Gantt chart outlines when promotional tasks should be completed. "Year 1" represents the first year that the WPI PEP is made available.

Task	Year 1							Year 2				
	June	July	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	April	May
Write WPI PEP newsletter			█	█	█	█	█	█	█	█	█	
Send WPI PEP newsletter				█	█	█	█	█	█	█	█	█
Design new posters	█	█	█		█		█		█			
Print and hang new posters			█		█			█		█		
Gift card raffle				█	█	█	█	█	█	█	█	
Select raffle winners					█	█	█	█	█	█	█	█
Recruit student ambassadors			█	█	█							
Meet with student ambassadors			█	█	█	█	█	█	█	█	█	█
Table sit					█		█		█		█	
Plan live event				█	█	█	█	█	█	█	█	
Live events					█		█		█		█	
Plan informational seminars	█	█	█	█								
Informational seminar for students				█								
Informational seminar for faculty					█							
Organize professor partnerships	█	█	█									

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