# Conducting a Situational Analysis

Conducting a situational analysis (SA) is the essential first step in writing a strategic plan. The purpose of the SA is to help you assess the problems and opportunities the plan must anticipate and address. This process can easily be applied to marketing and recruitment strategies.

## Problems and Opportunities

Opportunities are internal and external factors that will advance your institution. The decision by Amazon to build a mega sorting center near your campus is an opportunity.

Problems are obstacles that the plan must address so your institution is successful. A problem might be a science building that is dangerously out of date, or the decision by a competitor to offer a major that directly competes with your institution.

## Two Steps

The SA involves two distinct steps: data gathering & data synthesis

Our next checklist will examine data synthesis and evaluation.

## Data Gathering

### Secondary Data

The following provides guidance on primary and secondary data. Secondary data is pre-existing. Potential sources of secondary include:

- ☐ Trend data from your institution and/or competing institutions
- ☐ Existing institutional market research for the last three years
- ☐ Existing institutional internal research for a minimum of the last five years.
  - ☐ Marketing outcomes
  - ☐ Recruitment outcomes
  - ☐ Application results, including yield
  - ☐ Enrollment numbers
  - ☐ Completion data
  - ☐ IPEDS
- ☐ Associations like Council of Independent Colleges or American Council on Education
- ☐ Local, regional, and federal government
- ☐ Businesses and trade associations
- ☐ Internet searches
- ☐ Published reports
- ☐ Dissertations

While considering secondary data, evaluate it in terms of:

- ☐ Credibility
- ☐ Currency
- ☐ Applicability

## Primary Data

Generated specifically for the situational analysis (SA). It typically includes quantitative surveys and qualitative interviews and focus groups of key audiences.

The audiences to consider surveying as part of a SA include:

- ☐ Faculty (full-time, part-time)
- ☐ Strategic staff
- ☐ Key departments such as Admissions
- ☐ Existing students
- ☐ Alumni
- ☐ Prospective students
- ☐ Parents
- ☐ High school influencers
- ☐ Existing donors
- ☐ Potential donors

As you consider secondary data, make sure you evaluate it in terms of:

- ☐ Credibility
- ☐ Currency
- ☐ Applicability
- ☐ Focus groups

## Prioritize

Because your situational analysis can quickly become unwieldy and expensive, here are four ways to reduce the scope and cost of your SA:

- ☐ Limit research to audiences who will have the biggest impact on your institutions success
- ☐ Be willing to spend more on research for audiences who matter most
- ☐ Use inexpensive secondary research when possible
- ☐ Set up research cycles to routinely gather information on a regular basis, such as yearly or quarterly

Once data is collected, transition to synthesizing. How does the data make sense with everything learned during the process? We will explore this topic in the next checklist.

Have questions about this checklist, or need help with planning or executing your situational analysis, please contact: **Marianne Sipe** at Stamats.Enrollment@stamats.com

## Other resources from Stamats

- Sender's Remorse: How to Recover When Student Messaging Goes to the Wrong Audience
- Refining Email Messages for Dual-Enrolled Students
- Communication Timing: Send Students the Right Recruitment Message at the Right Time

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