Steps for Marketing Professional Development

• Step One: Making a Match  
   Tool: Audience/need/service table  
   Target audience identification  
   Tool: Target audience profile worksheet  
   Conducting a marketing needs assessment  
   Example: Marketing needs assessment

• Step Two: Creating a Plan  
   Tool: Professional development marketing goals  
   Example: Professional development marketing goals
   Develop SMART objectives  
   Example: SMART objective examples
   Develop and pretest messages and materials  
   Example: Key messages  
   Tool: Key message cards
   Create a marketing timeline  
   Example: Marketing timeline for Coordinated School Health Roadmap Training and Additional PD Services (table form)  
   Tool: Marketing timeline table
   Example: Marketing timeline (gant chart form)  
   Tool: Marketing timeline chart
   Identify measures of success  
   Tool: Evaluation strategy worksheet
   Recruit partners

• Step Three: Implementing the Plan  
   Think About Resources  
   Elements of Your Marketing Strategy
### Step Three: Implementing the Plan, continued

**Tool:** What’s in Your Wheel? 41
- **Messaging for Your Tactics** 42
- **Personality and Brand** 42
  - Example: Tactical Plan 43
  - Tool: Tactical Plan 44
- **Getting Attention** 45
  - Example: Save-the-Date Mailing 46
  - Example: Healthy Kids Learn Better 47
  - Example: HIV Postcard 48
  - Example: Coordinated School Health Training Ad 49

### Step Four: Assessing Your Marketing Efforts 51

- **Evaluation Can Improve the Effectiveness of Marketing** 51
- **Evaluation Can Help Effectively Engage Audiences** 51
- **Situations Change—Strategies & Tactics May Need To Change As Well** 51
- **Evaluation Helps Allocate Resources Wisely** 51
- **Review Step Two!** 52
- **Evaluating Tactical Efforts** 52
- **Evaluation Methods** 53
  - Example: Evaluation Planning Process 55
  - Example: Evaluation Strategy Worksheet 56
  - Example: Evaluation Data Collection & Review 57
  - Tool: Evaluation Planning Process Worksheet 58
  - Tool: Evaluation Data Collection & Review Worksheet 60
  - Example: Focus Group Guidance for Evaluation of Marketing Communications 61
- **Sharing Your Data** 63
- **Let’s Market** 64
For those of you who are charged with coordinating or conducting professional development (PD), a big part of your job is to help your clients increase their skill level in an effort to improve the health outcomes of youth. For example, you might offer PD to classroom teachers to update them on youth health risk behaviors, to strengthen their skill level on effective teaching strategies, or to build their skill in teaching a particular curriculum.

However, before you can improve the skills of this target audience, they need to show up. Many professional developers adopt the attitude that “if I provide it, they will come!” Unfortunately this wishful thinking doesn’t often work. A question: are your targeted groups showing up?

It is pretty hard to get people to take advantage of PD opportunities. Busy professionals may not notice what you have to offer, don’t see the value of your services, or they aren’t committing to attend your PD events. Don’t they know how great your work is? Don’t they know how important the services you provide are to their success?

That is exactly what this toolkit aims to do—give you some ideas for marketing your PD services so the appropriate audiences access your awesome skill-building events, resources, and technical assistance to learn about the latest and greatest to prevent risk behaviors in children and youth.

This toolkit will provide information, tools, and examples to assist you as you market PD services, to include 1) identifying appropriate audiences; 2) targeting audiences with relevant and well-defined PD services (based on best practices); and 3) designing and broadcasting information to increase interest, investment, and participation in PD services.

**Toolkit Objectives**

As a result of using this marketing toolkit, readers will be able to:

- Identify the key steps to marketing PD services;
- Implement a marketing plan tailored to the needs of the target audiences; and
- Access simple and customizable marketing worksheets, tools, and resources.

We plan to make your task of marketing PD services easy and effective.
The information in this toolkit is organized to help you easily navigate key concepts and information. Here is what you will find:

- **Information** is presented with background, context, and “how to” tips.
- **Quick/closer looks** highlight/summarize the information.
- **Tools** (that you can use to implement the information).
- **Examples** of the information (real use).

Here are the icons used throughout the toolkit:

- **This is important!**
- **Quick/closer look**
- **For more information**
- **Tool/worksheet**
- **Example**
The ultimate goal of PD is the effective implementation of skills and strategies that positively impact the health and well-being of young people.

The *Professional Development Practices*, originally developed by the Centers for Disease Control Division of Adolescent and School Health, are based on research and best practice and provide optimal conditions for the implementation of new skills to occur. The PD Practices encompass the delivery of PD in a group setting (trainings, presentations, meetings) and one-on-one (general technical assistance, coaching/mentoring).

**Sustain a PD Infrastructure**
Establish a high standard of practice for your PD efforts. Provide leadership and skilled staff to implement a results-based plan.

**Design PD Offerings**
Construct distinct training and technical assistance designs that are ideal in length and based on learning theory and best practice.

**Market PD Services**
Employ marketing tactics that capture the attention of your target audience(s) and prompt them to request your PD services.

**Deliver PD**
Execute training and technical assistance designs that impact learning and create change.

**Provide Follow-up Support**
Strengthen the knowledge and skill level of your participants through continued and targeted follow-up support.

**Evaluate PD Processes**
Collect usable data throughout the PD process and use the data to inform practice and report success.
Market Professional Development Services

**Step One**
Determine the PD services that will match target audience needs.

**Step Two**
Develop a comprehensive marketing plan.
As part of the plan:

- Develop SMART objectives that describe the marketing results to be achieved;
- Develop and pretest messages and materials that will resonate with target audiences;
- Create a marketing timeline;
- Identify measures of success; and
- Recruit partners who can support and assist in achieving marketing objectives.

**Step Three**
Implement the marketing plan.

**Step Four**
Use Data

- Collect evaluation data.
- Record data in data management system.
- Monitor and adjust the marketing plan/materials/messages as appropriate.
Step One: Making a Match

If you are already familiar with your target audience and their specific PD needs, the following table will be easy to complete. If not, find the information and tools you need in the pages that follow.

<table>
<thead>
<tr>
<th>Specific Target Audience</th>
<th>PD Subject/Topic</th>
<th>Specific Training Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Teachers with advanced health ed skills</td>
<td>HIV/AIDS</td>
<td>Model/role play refusal and negotiation skills</td>
</tr>
<tr>
<td>Example: Elementary teachers</td>
<td>Coordinated School Health</td>
<td>Incorporating physical activity in the classroom</td>
</tr>
</tbody>
</table>

1.

2.

3.

4.

5.

6.

7.

8.

9.
Target Audience Identification

Target audiences are the select groups of individuals that you have chosen to reach with your important message. Marketing activities start with knowing what motivates that group of individuals. Typically, marketers “segment” a population into different groups that have similar characteristics, behave in a similar manner, or are part of a particular social or interest group. If marketers have several audience “segments,” they often develop marketing plans for each group, or they tailor different elements of their marketing plans to address each group.

An audience profile is a good place to start as you identify the individuals/groups you want to reach. The profile provides a snapshot of your target audience and is crucial to your marketing plan because it gives you 1) insight on how to impact the group, and 2) the group’s investment in the issue.

The best way to get buy-in from your target audience is to frame your message in a way that addresses their perspective, needs, and wishes. This cannot be accomplished effectively unless you know and understand your targeted group. You will be much more successful if you use the Target Audience Profile Worksheet on page 10 as a starting point for your marketing plans, strategies, and tactics.

Common Target Audiences for Professional Development

- Youth
- Teachers with advanced health education skills
- Teachers with beginning health education skills
- Public health employees
- School administrators
- Community members
- Parents
- School staff
1. Who is the target audience you want to reach?

2. What are your target audience’s three most important goals or priorities for improving the health of children and youth?

3. Why are your services important to this target audience?  
   What’s in it for them? How will they benefit?
4. Currently, do you effectively reach this target audience?  
   *If yes, how do you reach them? What evidence do you have that you reach them effectively?*  
   *Which strategies have been successful?*

   *If no, why do you think these messages aren’t reaching this target audience?*

5. What are some ideas for improving the effectiveness of your messages to reach this target audience?
Conducting a Marketing Needs Assessment

A needs assessment is a formal process to get information about how to effectively reach your target audience. In the retail world, these individuals are called “customers.” It might be helpful to think of your audiences in the same way as customers when you think about marketing your PD services. Success (meaning people contact you for PD services or attend PD events) is often directly related to how customer-centered and customer-focused you are. The needs assessment is often your first opportunity to create a relationship with the audience. The better and more long-term the relationship, the better you will “sell” what you have to offer.

Marketing needs assessments identify how to focus your marketing efforts. The information gathered helps you describe and “sell” the right PD services to the right audiences in a way that gets noticed.

Needs Assessment Categories

- **Target audience general information**
  - The best ways to reach the identified audience (e.g., phone, email, mail, internet)
  - Marketing approaches best suited to motivate the audience to act
  - PD services that are of the most interest
  - The best “windows” of opportunity for reaching the audience
  - Barriers to participate in or implement the skills learned through PD services
  - Motivators to participate in PD services provided
  - Improvements to communication about available PD services
  - Ways to capitalize on their investment in health promotion
  - How to tap the “what’s in it for me” angle of marketing messages

- **Target audience interest in PD services**
  - How to best help them reach their professional goals related to improving the health of children and youth
  - Level of comfort teaching health content issues
  - How to use a variety of instructional approaches
  - Resource needs
  - Categories of professional development/continuing education hours needed
TARGET AUDIENCE GENERAL INFORMATION

1. Contact Information
   - Name
   - School/Agency Name
   - Professional Title
   - Email
   - Phone
   - Address

2. What is/are the best way(s) to reach you with information about upcoming PD opportunities related to health education? (Check all that apply):
   - Mail
   - Email
   - Phone
   - School intranet
   - Internet (e.g., Twitter, Facebook, Website, LinkedIn)
   - Professional organization listserves (e.g., a local Certified Health Education Specialist listserve)
   - Other (please specify)

3. Which grade-level students do you teach in your school? (Check all that apply):
   - 7
   - 8
   - 9
   - 10
   - 11
   - 12

4. How many professional development hours are you required to receive annually?
   - 0
   - 1-8
   - 9-16
   - 17-24
   - 25-32
   - 33 or more

5. How many professional development hours do you participate in annually, beyond your required hours?
   - 0
   - 1-5
   - 6-10
   - 11-15
   - 16-20
   - 20 or more

E.g.

EXAMPLE: Marketing Needs Assessment
6. What types of marketing materials are most effective in catching your attention?
   - Brochures
   - Informational flyers
   - Email newsletters
   - Advertisements in professional journals
   - Information on a website
   - Social media (e.g., Twitter, Facebook, LinkedIn)
   - Other (please specify) ___________________________________________________________________

7. Describe a marketing material for professional development services that you really liked (ad, flyer, brochure, etc.).

8. When do you prefer to attend professional development events?
   - Spring
   - Summer
   - Fall
   - Winter
   - Comments: _____________________________________________________________________________

9. Is there a day of the week that works best for you to attend professional development events?
   - Monday
   - Tuesday
   - Wednesday
   - Thursday
   - Friday
   - Saturday
   - Sunday
10. Is there a time of day that works best for you to attend professional development events?
   - Morning
   - Afternoon
   - Evenings

11. What are some reasons you WOULD NOT access professional development services? (Check all that apply):
   - Never hear about them
   - They are offered when it isn’t convenient for me
   - No travel reimbursement
   - No substitute teacher reimbursement
   - I don’t understand the benefit of the PD event
   - I’m not required to attend
   - I don’t have time
   - I don’t have support from administration
   - I’m not interested in subject
   - Other (please specify)____________________________________________________________________
   - Other (please specify)____________________________________________________________________

12. What are some reasons you WOULD access professional development services? (Check all that apply):
   - I’m required to attend
   - If financial support is made available, such as substitute stipends or travel reimbursement
   - If I have a challenging subject
   - I want to make a difference in the health and well-being of students
   - I want to improve my skill set
   - I receive professional credit hours
   - Other (please specify)____________________________________________________________________
   - Other (please specify)____________________________________________________________________
13. What do you think are the three most important benefits of professional development?

14. How can we improve our communication with you about professional development services and resources?

TARGET AUDIENCE INTEREST IN PD SERVICES

15. What are your personal goals for improving health instruction this year?

16. Rank the following professional development trainings according to your level of interest in participating during the next year.

_____ Curriculum training
_____ Standards-based health education
_____ Strategies for teaching challenging health content areas
_____ How to use a variety of instructional approaches
_____ How to use local and state data to tailor your health education instruction

_____ Other (please specify)________________________________________________________________

_____ Other (please specify)________________________________________________________________

17. What else would you like to tell us about the best way to inform you about professional development services?
Step Two: Creating a Plan

Now that you have identified your target audiences, their needs, and the best ways to communicate with them, you can begin designing a marketing plan to achieve your desired professional development (PD) outcomes. Marketing includes all of the tactics you use to capture your target audiences’ attention and prompt them to act (request your PD services). A marketing plan will keep you focused on how marketing your PD services helps you achieve your program goal(s). The typical tasks for creating a PD marketing plan are shown in the sidebar on this page.

Before you get started: Set good marketing goals.
Articulating goals can help you to be specific about the SMART objectives you want to accomplish (more on this on page 20). Goal statements help you to answer the question, “How do I know I have motivated my clients to utilize my PD services to empower their skills to improve the health outcomes of youth?”

<table>
<thead>
<tr>
<th>Good goals are:</th>
<th>So it is important to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Declarative statements</td>
<td>Provide a complete sentence that describes a marketing outcome.</td>
</tr>
<tr>
<td>Jargon-free</td>
<td>Use language that most people in the field outside your own agency are likely to understand.</td>
</tr>
<tr>
<td>Concise</td>
<td>Get the complete idea of your goal across as simply and briefly as possible leaving out unnecessary detail.</td>
</tr>
<tr>
<td>Easily understood</td>
<td>Use clear language for which there is a well-defined rationale.</td>
</tr>
<tr>
<td>Framed in positive terms</td>
<td>State the outcomes in positive terms of the behavior you want audiences to take. Avoid the use of double negatives.</td>
</tr>
<tr>
<td>A framework for objectives</td>
<td>Think in broad terms for your goals so that the objectives are stepping stones to make progress toward achieving the goals.</td>
</tr>
</tbody>
</table>

An example of a good marketing goal statement might be that “School health teams will be aware of and participate in PD services that are relevant to their needs.” In the Professional Development Marketing Goals tool that follows on page 18, you can see how this marketing goal might support your program goal(s) and include targeted audiences and objectives.
Once you have completed your marketing goals, you can build your foundation for a marketing plan by relating the goal to your program goal(s) and identifying the marketing objectives that will help you achieve the marketing goal. Use this tool to begin identifying your goals, relationship to your mission, and highlight potential target audience segments within this goal.

See page 19 for a completed example of this tool!
EXAMPLE: Professional Development Marketing Goals

MARKETING GOAL

School health teams will be aware of and participate in PD services that are relevant to their needs.

RELATIONSHIP OF THE MARKETING GOAL TO OUR PROGRAM’S GOAL(S)

By achieving this marketing goal, we will increase the skills that positively impact the health and well-being of young people.

OBJECTIVE(S) THAT SUPPORT ACHIEVEMENT OF THIS GOAL

By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts.

TARGET AUDIENCE SEGMENTS FOR THIS GOAL

School Wellness Team members, which may include:
- Teachers,
- Administrators,
- PTA membership, and/or
- Community members.
A. Develop SMART objectives that describe the marketing results to be achieved.

Objectives should be SMART — Specific, Measurable, Achievable, Realistic, and Time-phased. Objectives are statements that describe the marketing results and how they will be achieved. Objectives are the basis for monitoring progress toward achieving goals and setting targets for accountability. The aim of marketing objectives is to measure the effect of your marketing efforts on awareness of and participation in PD services, not the impact of those PD services. Your marketing objectives should support your broader program objective(s) and goal(s) found in your annual workplan.

What Makes an Objective SMART?

- **Specific**
  - Specific objectives provide the who (target population) and what (action/activity) of marketing activities.
  - A specific objective uses only one action verb.

- **Measurable**
  - Measurable objectives indicate how much change is expected.
  - A measurable objective makes it possible to count or document change in order to determine whether the objective has been achieved.

- **Achievable**
  - Achievable objectives can be accomplished given your program’s existing resources and constraints.
  - An achievable objective is attainable within a given time frame.

- **Realistic**
  - Realistic objectives address the scope of the problem and propose reasonable programmatic steps.
  - A realistic objective directly relates to the marketing goal.

- **Time-phased**
  - Time-phased objectives provide a time frame indicating when an objective will be met.
  - A time-phased objective indicates when the objective should be measured.

Creating a PD Marketing Plan

A. Develop SMART objectives that describe the marketing results to be achieved.

B. Develop and pretest messages and materials that will resonate with target audiences.

C. Create a marketing timeline.

D. Identify measures of success.

E. Recruit partners who can support and assist in achieving marketing objectives.

For more information on writing SMART objectives, take a look at CDC’s tutorial “Writing Good Goals and SMART Objectives.”

http://www.cdc.gov/phcommunity/resourcekit/evaluate/smart_objectives.html
Coordinated School Health SMART Objective

- By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts.

HIV SMART Objective

- By December 15, 20XX, 90% of health teachers in the state of Colorado will report receiving promotional materials highlighting the available trainings, resources, and curriculum support from the SEA HIV staff.

Tobacco SMART Objective

- By June 1, 20XX, the total number of students enrolled in the Second Chance online alternative to suspension program will have increased by 100% from the previous year, from 30 to 60.

Asthma SMART Objective

- By June 1, 20XX, 100% of school nurses will review the online policy checklist as a result of receiving informational materials detailing medication policy changes for students with asthma.
B. Develop and pretest messages and materials that will resonate with target audiences.

_Develop Key Messages_

Key messages should be simple and easy for the target audience to grasp. They can be crafted as general messages that appeal to a number of target audiences, or specific to the needs and interests of a specific audience.

It is important to limit the number of key messages to three or four and support them with a few bullets that illustrate or enhance the message. When messaging is focused on repeated themes, it has more strength due to frequency and consistency. Most audiences need to see a message about seven times prior to taking action.

Key marketing messages contain all the important points about your service or “product” (in this case, professional development). The aim of creating key messages include:

- Attract attention and interest,
- Generate an emotional response, and
- Elicit action or alliance.

Having consistent and focused marketing messages allows you to respond to the needs of your audiences and create a “buzz” about your services or program. Key messages should focus on:

- Educating and informing,
- Explaining benefits, and
- Creating an image.

_Incorporate Data_

Use data in your key messages. However, be careful to use data that are scaled/framed to the experience and perspective of the intended audience. For example, if your target audience includes parents, use data about the financial impact of obesity on a child as he/she grows up or about the average number of school days missed by a child with asthma. Data on the national, state, or even local level may not be personal enough to connect with a parent. Similarly, consider district-wide data for superintendents, school-level data for principals, and average classroom-wide data to reach teachers.

Key messages can be incorporated into marketing materials and can help frame an issue so target audiences are compelled to act. In the examples that follow, the desired action is for audiences to sign up for a one-day training that will increase their efficacy to address this area of youth wellness. Each PD program would describe the details of the training registration within the desired action.

Coordinated School Health Key Message Examples

**EXAMPLE:**

**Topic:** Students’ ability to learn  
**Audience:** Teachers  
**Key message:** Students in your class are facing life challenges that impact their ability to learn. Supporting students in every area of life is critical to helping them succeed in your classroom.  
**Desired action:** Learn more about helping students succeed in the classroom. Sign up for a one-day training...

**EXAMPLE:**

**Topic:** Students’ ability to learn  
**Audience:** Superintendents  
**Key message:** Want to improve standardized test scores? Consider a game of tag! Research supports that active and healthy students learn better.  
**Desired action:** Learn how implementing a Coordinated School Health Model in your district can improve student performance. Sign up for a one-day training...
HIV/AIDS Key Message Examples

**Example 1:**

**Topic:** Risk of HIV/AIDS

**Audience:** Parents

**Key message:** Adolescents need accurate, age-appropriate information about HIV infection and AIDS that includes abstinence as the only 100% effective way to avoid infection. We are your partners in abstinence-based sexual health education!

**Desired action:** Learn more about talking to your child about HIV/AIDS. Sign up for a one-day training...

**Example 2:**

**Topic:** Presenting sensitive health topics (e.g., HIV/AIDS)

**Audience:** Teachers with beginning health education skills

**Key message:** Answering questions about sex can be uncomfortable. Teachers need information and confidence to reply to student questions about sensitive health topics.

**Desired action:** Learn tips and techniques for teaching tough topics. Sign up for a one-day training...

---

**Step Two**

**EXAMPLE:** Key Messages
Asthma Key Message Examples

**Topic:** Costs of living with asthma  
**Audience:** Parents and principals  
**Key message:** On average, a student with asthma misses XX days of school.  
On average, a student with asthma costs $XX in treatment.  
**Desired action:** Learn ways to manage the impact of asthma on your children and students. Sign up for a one-day training...

**Topic:** Asthma policies and procedures  
**Audience:** School staff  
**Key message:** Asthma-friendly schools have asthma policies and procedures and coordinate school services to better serve students with asthma.  
**Desired action:** Learn how to impact school policy in order to make your school asthma-friendly. Sign up for a one-day training...
The following tool provides you with the opportunity to create your own key messages for your target audiences. One way to generate a variety of creative messages is to ask your team members to draft messages about each PD topic to the target audience using this template. Sort the key messages by topic and audience, then select and refine the messages. Allow your team to review all of the messages and come to consensus on the key messages they believe are best to reach your target audience.

<table>
<thead>
<tr>
<th>Topic:</th>
<th>Audience:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Key message:**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Desired action:**

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Color Code It**

Use colored card stock to differentiate messages by type or target audience.
B. Develop and pretest messages and materials that will resonate with target audiences, continued.

Pretest Messages and Materials
Messages should be shared with a sample of the target audience as a test in order to make sure the message is understood and effective. This is an important step for quality control prior to going through the time and expense to develop materials that promote your message.

Specifically, pretesting can help you:

- Select message concepts, like style, format, spokesperson, and appeal (e.g. fear, humor, or compassion),
- Guide creative work,
- Fine tune wording and visual images, and
- Guide revisions (before spending time and money on the finished product).

There are a number of methods for pretesting, including the following:

- Focus groups,
- Individual interviews, and
- Questionnaires.

Depending on the feedback you need, the amount of time you have, the types of materials you are developing, and your marketing budget, select the pretesting method that you feel is most appropriate to your needs, resources, and audiences. Learn more about each from the website in the sidebar.

For more detail on pretesting methods, read this technical assistance bulletin from the National Clearinghouse for Alcohol and Drug Information.

http://www.orau.gov/cdcynergy/soc2web/Content/phase04/phase04_step04_deeper_pretesting.htm

For guidance on conducting focus groups, interviews, or questionnaires, see CDC’s Evaluation Briefs.

http://www.cdc.gov/healthyyouth/evaluation/data.htm
C. Create a marketing timeline.

It’s important that marketing objectives, milestones, and benchmarks, be realistic and time sensitive, and be set up in the beginning of the planning phase. Think about marketing as a journey, not a destination. While there may be particular dates you target with outreach activities, marketing should be considered as a continuous process throughout the lifecycle of your program.

As you develop your marketing timeline, put on an audience “hat” in order to be sensitive to the audience’s perspective.

- When is their need/issue most urgent?
- When is a good time to reach them?
- What dates should you avoid?
- How do you consistently reach out to them over time with information about your services?

Use a calendar or the Marketing Timeline Table tool on page 30 to create a working timeline of outreach opportunities during the year. Your timeline should include your internal communication and preparation time needed to plan for marketing, the specific outreach steps you will take, major events to plan for or market, and critical dates for your target audiences that could impact or disrupt your marketing efforts. Remember to allow for development and production time for materials you would like to use at each point in time.

The two Marketing Timeline examples that follow on pages 29 and 31 provide different visual representations of how your marketing timeline could look.
## EXAMPLE: PD Marketing Timeline (table form)

### Marketing Timeline for Coordinated School Health Roadmap Training and Additional PD Services

<table>
<thead>
<tr>
<th>Month</th>
<th>Internal Decisions &amp; Planning</th>
<th>Event Outreach &amp; Dates</th>
<th>Other PD Service Outreach</th>
<th>Critical Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>August</td>
<td>• Identify target audiences</td>
<td>• Send creative invitation to School Health Advisory Council kick-off event</td>
<td>• Email target audience quarterly newsletter</td>
<td>School starts on 8/19</td>
</tr>
<tr>
<td></td>
<td>• Review previously collected needs assessment data from that audience to direct services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>• Develop future PD event objectives</td>
<td>• Develop and produce Roadmap materials to distribute at October in-service</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Parent-teacher conferences 9/15-16</td>
</tr>
<tr>
<td>October</td>
<td>• Set date for next PD event</td>
<td>• Mail “save-the-date” teasers to target audience</td>
<td>• Distribute promotional materials at teacher in-service</td>
<td>Teacher in-service 10/22-24</td>
</tr>
<tr>
<td></td>
<td>• Identify event “theme”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>November</td>
<td>• Design promotional materials for February event</td>
<td>• Begin monthly marketing of TA to school health teams</td>
<td>• Email target audience quarterly newsletter</td>
<td>Thanksgiving week</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Open Roadmap registration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>December</td>
<td>• Create marketing plan for PD resources</td>
<td>• Advocate Roadmap PD event to the appropriate decision-makers</td>
<td></td>
<td>Winter Holiday final 2 weeks</td>
</tr>
<tr>
<td>January</td>
<td>• Produce promotional materials for February event</td>
<td>• Send Roadmap event reminder for registration</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Send “congrats” email to those who register for taking a positive PD step</td>
<td></td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>• Set date for PD event</td>
<td>• Send Roadmap event reminder to registrants</td>
<td>• Email target audience quarterly newsletter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Identify event “theme”</td>
<td>• Host the PD event: Coordinated School Health Roadmap training on 2/17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>March</td>
<td>• Review evaluation data from event to direct next PD event topic</td>
<td>• Send PD services “teaser” to interest audiences in a range of services</td>
<td>• Standardized testing at the end of the month</td>
<td></td>
</tr>
</tbody>
</table>
Map out various communication and outreach opportunities by month. Use a variety of communication tactics to repeatedly reach out to your audiences (e.g., events, presentations, mailings, etc.). Remember to include internal decision-making and planning with your team as part of your marketing timeline. You can find more about creative communication tactics in Step Three of the PD Marketing Toolkit.

<table>
<thead>
<tr>
<th>Month</th>
<th>Internal Decisions &amp; Planning</th>
<th>Event Outreach &amp; Dates</th>
<th>Other PD Service Outreach</th>
<th>Critical Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**EXAMPLE:** Marketing Timeline Chart (gantt chart form)

- **August**
  - Monthly team meeting to plan PD events and marketing outreach
  - Marketing needs assessment
  - Create PD event descriptions
  - School starts
  - Mail newsletters
  - Create event registration
  - School Health Advisory Council kick-off

- **September**
  - Update online photo/video page monthly
  - Design event promotional items
  - Select PD event venue
  - Teacher incentive
  - Distribute promotional materials
  - Marketing plan for resources

- **October**
  - SDP events and marketing outreach
  - Create PD event themes
  - Parent/Teacher Conferences
  - Produce promotional materials for event
  - B2B outreach
  - Mail Roadmap event invitations

- **November**
  - SDP and marketing outreach
  - Marketing plan for resources
  - Winter holidays
  - Thanksgiving holiday week
  - Mail newsletters
  - Promote events to administrators
  - Open Roadmap registration
  - Outreach monthly to maintain the availability of technical assistance to school health teams.

- **December**
  - SDP and marketing outreach
  - SDP and marketing outreach
  - SDP and marketing outreach
  - SDP and marketing outreach
  - SDP and marketing outreach
  - SDP and marketing outreach
  - SDP and marketing outreach
  - SDP and marketing outreach

**Critical dates for target audience**

**PD Events**

**Marketing outreach**

**Internal communication**

**e.g.**
Use this blank gant chart to begin planning your marketing outreach opportunities. Use the suggested color coding and categories, or create your own to customize the tool for your needs.

<table>
<thead>
<tr>
<th>October</th>
<th>November</th>
<th>December</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
</tr>
</thead>
</table>
D. Identify measures of success.

Without a thoughtful evaluation strategy you have no way of knowing if your marketing plan is working or whether you need to make adjustments. Knowing the effect of your marketing outreach activities and fine-tuning those areas that need improvement will help you reach the outcomes you seek.

When you wrote your SMART objectives at the beginning of the planning stage, you made sure that they were measurable. That's a great place to start when you evaluate marketing outreach.

- **Measurable objectives indicate how much change is expected.**
- **Measurable objectives make it possible to count or document change in order to determine whether the objective has been achieved.**

In this sample objective, you can see the measurement component:

*By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts.*

You can measure this objective by tracking the number of online registration clicks from an online email service or by asking participants during registration or at a training how they heard about the event.

The *Evaluation Strategy Worksheet* tool on page 34 will help you begin to identify the data you can track to measure the successes of your marketing efforts. In **Step Four** of the toolkit you will find additional information and resources about using data to track your marketing efforts.
**TOOL: Evaluation Strategy Worksheet**

Complete this tool to identify the types of data that will help you measure the reach and effect of your marketing efforts. Be sure to have your marketing objectives on hand to identify the data sets relevant to measuring outputs of your marketing activities.

1. **Determine what you will evaluate.**
   As you are developing your marketing plan, you should be thinking about how you will measure your success. List the types of information you can collect to determine whether your efforts are meeting your marketing objectives. Examples include the following:
   - Amount of PD information now visible/available to specific target groups
   - Changes in the number of requests for PD
   - Increase in number of participants at events
   - Number of emails sent, flyers distributed, or website visits

2. **Using information from your SMART objectives, define how you would like to measure the success of your marketing plan.**
   What are the short, medium, and long-term successes you expect to see as a result of your marketing activities?

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short-term successes (measure the “reach” of marketing activities)</td>
<td>e.g., Number of flyers distributed or emails sent</td>
</tr>
<tr>
<td>Medium-term successes (measure the “implementation” of the marketing calls to action)</td>
<td>e.g., Increase in visitors to your website</td>
</tr>
<tr>
<td>Long-term successes (measure the “effectiveness” of marketing efforts)</td>
<td>e.g., Increase in requests for additional services or attitude shifts around the value of PD or health content topics</td>
</tr>
</tbody>
</table>
E. Recruit partners who can support and assist in achieving marketing objectives. Marketing efforts are typically considered the most effective when word begins to spread among your audiences on its own. You know you are successful when your audience has become convinced of the value of your PD services to the point that participants begin to bring their colleagues to benefit from your services. Making information “contagious” among your target audience is dependent on involving key people. Think about who these individuals are in your sphere of professional influence and engage them:

- Decision-makers have the authority and power to “endorse” your PD so that your audience members will listen.
- Past participants who have been successful are a great partner in spreading the word about the benefits of your PD services.
- Influential professional groups, such as a state chapter of health educators, can be a persuasive force in promoting your PD services.

Review the diagram below to spark ideas about additional partners you can access in the marketing process. You may have ideas of other influential partners you can include to promote your message. Consider various ways to include their endorsement, success, or trusted voice in your marketing activities.
E. Recruit partners who can support and assist in achieving marketing objectives, continued.

Ideally, you will have access to marketing and/or graphic design professionals within your organization. However, sometimes you may need additional help or creative expertise. Outside consultants, especially those with expertise in marketing communication or design, could help in your efforts to market your PD services.

Reasons for using a marketing consultant

- To ensure objectivity and eliminate internal politics;
- To take advantage of marketing experience without adding to your permanent overhead;
- To meet a temporary need;
- To add expertise;
- To provide support to existing personnel;
- To launch new products into new markets or channels; or
- To obtain a new perspective or a new way to tackle a problem.

Marketing Consultant Hiring Considerations

- **Find the Right Consultant**
  - Ask colleagues for referrals of marketing specialists, or
  - Search recommendations online through professional marketplaces, such as LinkedIn™
- **Outline the Work Needed**
  - Outline your marketing objectives and key characteristics of your target audiences,
  - Identify the specific tasks that you are hiring the marketing consultant to complete, and
  - Describe how you will provide feedback to improve or focus the marketing consultant’s performance.
- **Seal the Deal**
  - Outline the role of the consultant and how they will work with and communicate with your team, and
  - Describe the contracting and payment process your employer uses.
**Step Three: Implementing the Plan**

You have developed your SMART marketing objectives that describe the marketing results you want to achieve, developed and pretested messages with target audiences, created a marketing timeline, identified measures of success, and recruited strategic partners who can support and assist in achieving your marketing objectives. So what’s next?

Your messages need to be communicated in a compelling and convincing way, with some frequency using different outreach tactics. There are many marketing communications tactics and tools that can help you get the word out, including advertising (paid placement), public relations, special events, and the use of collateral materials (print and promotional).

Use your SMART marketing objectives and specific timeline as guides to operationalize the specific marketing outreach or “campaigns” that you select. For example, one SMART marketing objective from Step Two detailed the following:

> By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts.

In the example timeline on page 29 that corresponds to this example objective, it was outlined to market the event using a “save-the-date” outreach in October with additional marketing outreach in January and February for the event. This means you have three unique opportunities to capture your target audience’s attention using specific tactical elements. But which tactic do you choose?

**Think about resources**

It’s important to consider the resources you have available for implementation, including financial, human, and environmental. Advertising, printing brochures, and producing promotional items cost money, so discuss the available budget to support your marketing implementation efforts.

Identify human resources—who is available to assist in outreach? Environmental resources include things such as meeting space, tables, chairs, and audiovisual equipment.

---

**Ways to Use Marketing Materials**

- Inform, educate, and invite action/participation.
- Send to those who request more information or as a way to keep in touch.
- Leave behind after appointments or meetings.
- Post on a web site.
- Place in your office as a “take one” piece.
What are the elements of your marketing strategy?
A marketing “wheel” can help you select specific tactical elements of your marketing outreach. The tactics in your wheel should reflect what makes sense for marketing your program, taking into consideration your resources and the target audiences you want to reach. Each of the wheel elements shown here are described on the following pages.

**Tactics**

*How will you communicate messages in a compelling and convincing way?*
Needs assessment
We’ve already discussed how a thorough needs assessment will provide you with the information needed to effectively communicate your message(s)—Step One. After collecting data, you have the necessary foundation to determine an effective marketing plan that will support your program goals—Step Two. However, needs assessments also allow you to connect with your audience, which is also a good marketing tactic! Your needs assessment is an opportunity to remind your target audiences that you are available to them and provide services tailored to meet their needs.

Presentations
Attend meetings where your target audience will be and request some time on the agenda to share information about your programs and services. Remember to bring targeted materials that use key messages the audience will respond to.

Strategic alliances
Building strong relationships is important for creating buzz about your professional development services. Think about who and what you need in order to create awareness and move people to action. These partnerships were also discussed in Step Two on page 35.

Event outreach
Event marketing gives you a unique opportunity to connect with your target audiences in person. Become informed about the different events happening where your target audiences gather and consider participation as an exhibitor, panelist, speaker, or partner. Your team can become “street marketers” and can distribute promotional items and messages to participants at events. Contact event planners to find out how you can participate.

Motion media
Think about using a flip camera, built in webcam, or smart phone to capture some video or photographs at one of your programs. Place those media on your website, Facebook™ page, or YouTube™ channel.

Web/internet
The web continues to grow as an important vehicle for reaching target audiences. If you have a website, use it as a strategic tool for sharing current information. Additionally, many organizations have an intranet site which could be used to reach an internal target audience to advocate for and promote the great work that you do within the organization.
Collateral & promotional items
Promotional items are a collection of materials used to support the promotion of a service or idea. These materials are intended to make the communication effort easier, eye-catching, fun, and more effective. Your organization’s logo and “look and feel” are clear on these materials. Examples include the following:

- Informational brochures
- Postcards
- Letters
- Posters, signs and banners
- Visual aids used in presentations (e.g., PowerPoint™)
- Web content
- Factsheets
- Newsletters
- Gear items (e.g., branded with a logo, phone number, and/or website address, such as stress balls, highlighters, key chains, etc.)

Social media
Learn more about Facebook™, Twitter™, LinkedIn™ and other social sharing vehicles that can be used to communicate what you are doing, to invite people to attend events, and to share resources.

Paid advertising
Advertising is a paid media while public relations is earned. In order to place an ad in the newspaper, on TV, or in a magazine, you must pay to place that ad. Advertising guarantees the placement of your message while public relations is often subject to other news that may bump your story because it’s breaking/major news.

Public relations
Public relations encompasses everything that advertising does not. Everything from a letter to the editor to a presentation to a target audience can fall under the label “public relations.”

Get to know editors and reporters; knowing your local media representatives will provide you with a unique advantage when pitching a story idea or reacting to a news article.
The tactics we listed on the previous pages may not be all that you have available to you and/or may not fit within your limited resources. Make a copy to hang in your office. Use the empty wheel provided to cut and paste the tactics and tools that you plan to use to reach your marketing plan objectives. Use the blank boxes to add your own tactics. Use the example on page 38 to guide your choices.
Messaging for your tactics
Now that you’ve selected unique tactics for each outreach, it’s time to add in the key messages you developed and targeted to each of your audience segments in Step Two! Identify the key message that fits best with the target audience, the tactic, and the action you want them to take. Be succinct and focused on what meets your target audiences’ needs.

Personality and brand
Within each marketing tactic and aligned outreach, your materials will send a specific message about your brand and “personality.” Your brand is the consistent promise about your services that you communicate to your clients. Branding includes everything from fonts and colors to logos and taglines. It is likely that your organization has branding requirements that include when and how to use your logo. Be sure that you follow your organization’s specifications in all of your marketing materials, as applicable.

The personality of your messaging is reflected in the type of language you will use with target audiences. Are your messages friendly and inviting to participants? Professional to communicate targeted value of your services to superintendents? Provocative to peak the interest of alternative high school HIV health teachers? Motivating with active verbs to relate to physical education teachers? Select the personality that both communicates respect and invites their interest and participation.

Communication Tips
- **Focus**
  Focus your message on the benefits to target audience(s).
- **Message**
  Provide enough information to captivate, persuade, and lead to action.
- **Design**
  This includes the “look” and “personality” of your materials. A good first impression goes a long way to getting attention and interest. In addition to solid graphic design, make brochures, palm cards, and PowerPoint™ presentations easy to read.
- **Credibility**
  Testimonials, case studies, correct grammar and typo-free content all lead to credibility. Credibility is very important in building relationships.
Example: Tactical Plan

This example Tactical Plan outlines marketing outreach methods used to reach the following SMART marketing objective example from Step Two: By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts. The example timeline from page 29 details three timed outreach opportunities to promote the event. However, you can include as many tactics as you find necessary to keep your marketing objective in the forefront of your target audiences’ minds.

<table>
<thead>
<tr>
<th>Month (from timeline)</th>
<th>Event outreach (from Timeline)</th>
<th>Tactic and description</th>
<th>What is the purpose of this tactic?</th>
<th>What “personality” will be conveyed?</th>
<th>Which key message will you use?</th>
</tr>
</thead>
<tbody>
<tr>
<td>October</td>
<td>Mail “save-the-date” teasers to target audience.</td>
<td>Mailing that will share the dates and location of the training, along with primary learning goals and intended participant groups.</td>
<td>To encourage target audience groups to save-the-date for the Roadmap training.</td>
<td>Fun, colorful, and health-promoting. Based on well-established relationships with this audience, the tone can be friendly and personal.</td>
<td>Students in your class are facing life challenges that impact their ability to learn. Learn how to help them succeed in your classroom through healthy choices, activities, and support. (We decided to use the same key message for each tactic to keep the message consistent.)</td>
</tr>
<tr>
<td>January</td>
<td>Send Roadmap event reminder for registration.</td>
<td>ePostcard to outline the links to registration and detailed information for the event, including objectives, session titles, and agendas.</td>
<td>To inform target audience that registration is open and to encourage registration.</td>
<td>Similar “look and feel” as the mailing to jog audiences’ memories about the event.</td>
<td></td>
</tr>
<tr>
<td>February</td>
<td>Send Roadmap event reminder to registrants. Email target audience quarterly newsletter.</td>
<td>Newsletter that includes the registration link. Since the webpage has complete accessibility to all additional event information, the newsletter can contain brief promotional information.</td>
<td>To encourage event registration.</td>
<td>Similar verbiage as the mailing to jog audiences’ memories about the event. If a picture can be included, it should include similar colors, shapes, or images as the mailing.</td>
<td></td>
</tr>
<tr>
<td>Ongoing November to February</td>
<td>Email signature that shares the event registration reminder and link at the bottom of every email sent from event planners’ email accounts.</td>
<td>To encourage event registration.</td>
<td>Similar color, font, and verbiage as the mailing to jog audiences’ memories about the event.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ongoing November to February</td>
<td>Website: with a prominent “button” on the Department of Education website that links to event information and registration.</td>
<td>To encourage event registration.</td>
<td>Similar color, font, shapes, and verbiage as the mailing to jog audiences’ memories about the event.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Now it is your turn! Add details to the tactics and tools that you identified in your tactic wheel on page 41. Describe each tactic, where it fits within your marketing timeline, the purpose, and how you will achieve that purpose. Think about the “personality” that different tactics will convey and the key messages you will use to inform the verbiage you select. You should have a few different key messages to pick from that you developed in Step Two.

<table>
<thead>
<tr>
<th>Month (from timeline)</th>
<th>Event outreach (from Timeline)</th>
<th>Tactic and description</th>
<th>What is the purpose of this tactic?</th>
<th>What “personality” will be conveyed?</th>
<th>Which key message will you use?</th>
</tr>
</thead>
</table>
Getting attention
How many marketing and advertising messages do you think people are exposed to each and every day? The surprising answer is 5,000.* That’s a lot of messaging through billboards, buses, TV, cable, radio, internet, social media, signage, overheard conversations, word of mouth, email, e-newsletters...all suggesting what to buy or what to do.

Out of those 5,000 messages, on average, a person can only pay attention to about 100.* You need to think about what will make your message stand out in all that information. You can’t expect people to just notice. You have to be strategic and innovative to be seen and heard.

People remember things best when their senses are engaged—when they see, hear, and are stimulated to think about something. It’s really about how the brain works to process information, and from a marketing perspective, you can help that process along by using some “brain grabbers” such as:

- Emotion
- Color
- Photographs
- Illustrations
- Novelty (an unusual perspective/look at something)
- Humor


The following marketing example, used by PDP for the 2011 Institute, demonstrates one creative way to implement a save-the-date mailing by providing basic information, using a colorful and friendly personality, and incorporating key message language. This is just one way to operationalize the tactic, but through creativity, you could take a similar mailing in many different directions! Can you think of other creative ways to get this message across?

**EXAMPLE:** Save-the-date mailing

Everyone who is anyone will be there.
(Well, maybe just you PD types, but that’ll be lots of fun.)

**April 27 to 29, 2011**
Omni Interlocken Resort | Broomfield, Colorado

You’ve got to save it.
The date that is, for the 2011 Professional Development Partnership Institute.

This annual, three-day Professional Development event is amazingly designed just for you. You have to be there. You can’t miss it. It just won’t be the same without you.

Who is “you?” CDC DASH-funded Professional Development Coordinators and your team members.

Please save the dates, **April 27 to 29, 2011**, and join us at the Omni Interlocken Resort in Broomfield, Colorado.

**For more information, visit pdp-rmc.org**

Just in case you happen to be in the neighborhood, watch for PDP at “Healthy Students...Successful Learners,” October 15 to 16, and “Follow the Tracks to Program Success,” October 16 to 19, in Kansas City, Missouri. For more info visit ashaweb.org and dashpartnersmeeting.org

Stick these stickers someplace to help you remember that you need to be there. We won’t judge. Well maybe just a little. We’ll probably ask you to share with us your sticky spot choices, just to start a conversation.
Case Study: Healthy Kids Learn Better Partnership (HKLB)

Oregon’s Coordinated School Health (CSH) program developed an external communications video to enhance awareness within the business community in Oregon related to CSH programs. The video showcased three schools that are successfully implementing CSH to address physical activity and healthy eating. The video’s key messages included the following:

- Coordinated School Health Programs (CSHP) are integrated, planned, school-based programs that are designed to promote the physical, emotional, social and educational development of students.

- CSHP’s can help improve and maintain the health of students so that they fulfill their learning potential.

- CSHP’s are designed to enhance the health and education of students in preschool through the 12th grade through the following eight core components: healthful school environment, health services, health education, physical education, counseling and social services, nutrition programs, family and community involvement and staff health promotion.

- CSHP’s can help improve the health and educational achievement of students, which may help prepare a healthy and productive workforce for the future.

- CSHP’s develop skills such as decision-making and problem solving that are important in the workplace.

- Local business and the community can make an important difference in the lives of children and young people by getting involved with Healthy Kids Learn Better.

They wanted to create a message that tugged at the hearts of those viewing the video, increased awareness of the benefits of CSH through the perspective of school communities, and engaged participants enough to contact the state department of education, or go directly to their local schools and begin developing meaningful partnerships.

The video was disseminated to strategic partners, curriculum specialists, businesses, and organizations. Additionally, the video can be accessed online for continued use in promotion of the CSH programs.

For more information on this project, visit www.hklb.org or http://www.ode.state.or.us/search/page/?id=1540.
The following marketing examples use different tactics, messages, personality, and branding to reach each program’s specific marketing objectives. Use these examples to spark ideas about the creative use of tactics to market your PD services.

Material Sample: HIV postcard

Many teachers lack detailed information about HIV and the confidence to raise the issue about behaviors that put youth at risk for infection.

If you are one of them, come learn more about current practices in HIV awareness and prevention.

COURSE TITLE
DATE TIME PLACE
PHONE NUMBER/WEBSITE ADDRESS

e.g.
Health: The Essential Tool for Success in School

Supporting kids and addressing health issues such as self-esteem, achievement, hunger, depression, stress, harassment, abuse, substance use, pregnancy, eating disorders, unsafe living conditions and obesity can greatly improve their ability to learn.

You Can Help.

Attend a coordinated school health training and learn more.

<table>
<thead>
<tr>
<th>Course Title</th>
<th>Time</th>
<th>Place</th>
<th>Date</th>
<th>Phone/Website</th>
</tr>
</thead>
</table>

ENGAGING/INVITING PHOTOGRAPH.

TARGETED TO A SPECIFIC AUDIENCE (TEACHERS).

ACTION ITEM.

e.g.
Step Four: Assessing Your Marketing Efforts

Have you ever wondered if the money you spent on producing creative promotional items for your PD services paid off? Did your online strategy reach your audience(s)? Do your key constituencies perceive your organization the way you want them to? Evaluation can help you answer these questions and more.

Evaluation improves the effectiveness of your marketing efforts
Knowing the effect of your marketing activities and fine-tuning those areas that need improvement will help you reach the objectives in your marketing plan.

Evaluation can help you effectively engage with your audience
How do you identify and connect with your audiences and ensure that your messages are resonating with them? Evaluation is key. Even if you tested your key messages already, as outlined in Step Two, your audience needs and the messages that resonate may change. Throughout implementation, evaluation can help you find ways to gather feedback from your audiences and learn how they are responding to your messages.

Situations change—strategies and tactics may need to change as well
In working to generate response to your PD marketing, you will inevitably face unexpected events, opportunities, and threats that affect your work. Evaluation helps you collect valuable information at these critical moments so that you can make marketing adjustments. It can also help you determine whether your changes are putting you back on the path to success.

Evaluation helps you allocate resources wisely
Everyone works with limited human and financial resources. Evaluation can help determine whether your marketing investments could be redistributed more effectively to achieve the desired results.


About Assessment
No one wants to travel a long distance, spend a lot of money, and somehow end up in the wrong place. Evaluating your marketing along the way can help you to stay on course and reach your destination.

It is difficult to evaluate every aspect of your work. If you have a comprehensive marketing strategy, select the components that are most critical to its success.

Or, you may choose to evaluate a tactic that your organization is using for the first time.
Review Step Two!

When you completed Step Two of this toolkit, you spent some time identifying “Measures of Success.” Those measures are an ideal starting point for thinking about your marketing evaluation strategy in more detail.

As a reminder, when you wrote your SMART marketing objectives at the beginning of the planning stage, you made sure that they were measurable. That’s the place to start when you evaluate marketing outreach because:

- Measurable objectives indicate how much change is expected.
- Measurable objectives make it possible to count or document change in order to determine whether an objective has been achieved.

In this sample objective, you can see the measurement component:

*By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts.*

Evaluating tactical efforts

Online registration clicks and survey questions to participants are both valuable data sets to collect in relationship to the success of the marketing objective. However, you likely used a variety of tactics in Step Three to promote the training to target audience groups. Each of those tactics has a data set that might be useful to track but the details of which were not reflected in your initial plan on page 34 of Step Two.

Data on each of your tactics can help you shape and refine future strategies and to monitor progress and make corrections during implementation. The idea is to prepare up front and evaluate as you go along so that you may adjust your tactics to ensure success.

Here are some things to consider as you think about the data sets available for each of your marketing tactics:

- Message dissemination (how well your messages are spread to others by your allies/key stakeholders, such as teachers).
- Public relations (the relationships you build with target audiences, your internal team, and allies/stakeholders).
- Quality of communication exchanges with your audience (satisfaction with direct communications from your staff/team).
- Print, online and other communications (newsletters, presentations, webinars, brochures, e-mails).

Make sure the data sources you spend your time evaluating tie back to demonstrating the success of your marketing objectives from Step Two and the implementation of your marketing tactics from Step Three.

This is not a comprehensive list, just some ideas to get you thinking!
Evaluation methods

*Interviews*
Interviewing consists of selecting a handful of individuals who represent the base of your audience and asking targeted yet open-ended questions. This will allow you to receive better insight into how people are responding to your marketing activities.

*Focus Groups*
You may want to bring together a group of people from your audience to test new messages or have a directed group discussion about your communication activities. Unlike interviews, focus groups are moderated by a facilitator and allow people to bounce ideas off one another, building a richer set of data. An example of guiding questions for a marketing focus groups follows on page 60.

*Surveys (online, face-to-face)*
Using simple and inexpensive technology, you can administer an online survey consisting primarily of multiple-choice questions. While you may be able to ask some open-ended questions, surveys are best for “checkbox” answers that garner quantitative data. Surveys can also be administered in person, allowing you to also observe the respondent and gather additional data based on his or her reactions to the questions.

*Quantitative Data Collection*
Websites, blogs, and other social media allow you to collect useful data. For instance, on a website, you can track the number of daily or monthly visitors, downloads, and page views. For blogs and social media, you can track number of subscribers and number of comments left by visitors.

Evaluation methods, continued

Promotional Item Distribution Tracking
You can track the reach of your promotional items by tallying distribution numbers for mailings, emails, brochures, flyers, and materials disseminated at conferences. Though this data does not assess the value of your marketing materials, it does demonstrate reach and effort to contact target audience groups.

HTML Email Response Rates
Most HTML email providers collect data on the numbers of emails sent, percentage opened by recipients, the numbers forwarded or shared with additional partners, and the quantity of website links or downloads clicked on by each recipient. These data, which can be separated by each individual target audience member, gives you clear information on the types of emails that get noticed, forwarded, and the specific information within the email perceived as most valuable to the recipients.

Action Research
You can alter the messaging and/or timing of your tactics to see which specific marketing outreach provides the most significant response rate from participants. For example, to promote a webinar, try four different provocative or informational subject lines in your email invitations, and send each one to a separate test list. Using your HTML email provider response rate data, see which email subject line stimulates the highest “open” and “click” rates from the target audience group. Use this version to send the invitation out to the remainder of your target audience list.
In the example below and on page 56, we are demonstrating an evaluation planning process as applied to one specific training event: in this case, the Coordinated School Health Roadmap training used throughout Step Two and Step Three.

1. We listed example data source options in the last column that will assess the accomplishment one example marketing objective below. The example data sources were gathered using the responses to the first and second questions on the Evaluation Strategy Worksheet on page 34 of Step Two and the Example Tactical Plan on page 43 of Step Three. Each of the example data sources applies to the following example SMART marketing objective:

   By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts.

   The data sources listed in the matrix on the next page are not a comprehensive list; they provide a reference to outline the marketing evaluation planning process.

2. See the answers for the following questions for each of the identified example data sources in the right column of the matrix on page 55:

   - How will you collect baseline data?
   - How will you collect post-marketing data?
   - Where will data collection be kept so that each team member can contribute data as gathered?
   - How often will you review the data to determine needed strategy adjustments?
<table>
<thead>
<tr>
<th>Data Source</th>
<th>Evaluation Process and Collection</th>
</tr>
</thead>
</table>
| Number of participants at events    | **Baseline Data:** Refer to participant training lists/numbers from previous year.  
**Post-Marketing Data:** tally participant training lists/numbers during marketing timeline.  
**Data Collection Location:** All training lists will be placed in a shared file for evaluation.  
**Data Review:** Team will review data after each training to discuss participant numbers and marketing methodology. Based on data review, the team will determine whether or not additional evaluation should be used to assess causality for changes in participation levels. |
| Website visitors                    | **Baseline Data:** Refer to web analytics data from the previous year.  
**Post-Marketing Data:** Monthly web analytics reports will tally changes in web access during the marketing outreach timeline.  
**Data Collection Location:** Monthly web analytics reports will be downloaded and kept in the shared file for evaluation.  
**Data Review:** Team will review data monthly and look for spikes in website hits tied to the timing of marketing outreach. Based on data review, the team will highlight and replicate successful website marketing techniques. |
| Emails distributed                  | **Baseline Data:** No baseline data available since using new HTML email service. Average “open” and “click” rates can be referenced if needed for comparison.  
**Post-Marketing Data:** HTML email “open” and “click” rate reports can be saved after each email marketing campaign.  
**Data Collection Location:** HTML email reports will be downloaded and saved in the shared file for evaluation after each email marketing campaign.  
**Data Review:** Team will review data after each email marketing campaign to compare and look for changes in “open” and “click” rates between campaigns. Based on data review, the team will highlight and replicate successful email marketing techniques. |
| Tactic that participants identify as successful to market the Roadmap training | **Baseline Data:** No baseline data available since we have not asked participants to identify how they heard of trainings previously.  
**Post-Marketing Data:** Quantitative report from online registration asking for checkbox response of how participants heard about the event: email from Dept. of Ed., email from colleague, physical flyer, save-the-date mailing, Dept. of Ed. website, Dept. of Ed. newsletter, Other________.  
**Data Collection Location:** Data will be tallied in online survey tool used for event registration. Reports will be downloaded and saved in the shared file for evaluation after registration is closed.  
**Data Review:** Team will review data after each PD event to compare marketing tactic success that led to participant registration. Based on data review, the team will highlight and replicate successful tactics. |
In the following example, you will see an outline of a realistic process of data collection, comparison, and review. The example *Evaluation Planning Process* on page 54 outlines the steps that you would take prior to a marketing campaign to identify how you will collect and review data. This example of *Evaluation Data Collection and Review* outlines the process of actually collecting, tallying and reviewing the data to make informed marketing decisions and determine your rates of success. The same example data sources were taken from page 57 and created example baseline and post-marketing data points and modeled a decision-making process to determine the success of the SMART marketing objective:

*By year two of the project, 75% of school wellness teams who attend the Coordinated School Health Roadmap training will report that their attendance is a result of the SEA staff’s marketing efforts.*

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Baseline</th>
<th>Post-Marketing</th>
<th>Notes from Data Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of participants at events</td>
<td>2009-10 Roadmap training: 130 participants.</td>
<td>2010-11 Roadmap training: 200 participants.</td>
<td>2010 marketing only included one email campaign. 2011: 90% repeat attendees. 42% new participants. Marketing included 3 separate outreaches, advocacy to superintendents, and new website access. Causality can’t be determined by increased numbers alone.</td>
</tr>
<tr>
<td>Website visitors</td>
<td>2009-10 Roadmap Website visitors: average of 35 visitors monthly.</td>
<td>2010-11 Roadmap Website visitors: average of 75 visitors monthly.</td>
<td>114% increase in website visitors. Largest one-month increase was January 2011, with 370 visitors—coincides with the email marketing campaign for the Roadmap training.</td>
</tr>
<tr>
<td>Emails distributed</td>
<td>2009-10 emails: CSH team sent one marketing email from personal account to 1200 educators statewide. No data available on “open” or “click” rates.</td>
<td>2010-11 HTML email campaign: 1300 recipients. 35% “open” rate for email. Of those that opened, 75% (or 340 recipients) clicked on the registration link.</td>
<td>140 completed registrations within 2 weeks of the email campaign. “Open” and “click” rates are approx. 35% higher than the HTML email provider’s averages. Timing of registrations coincides with email campaign.</td>
</tr>
<tr>
<td>Tactic participants identify as successful to market the Roadmap training</td>
<td>2009-10 No data available from participants.</td>
<td>2010-11 Registration responses indicate 30% save-the-date 48% HTML email 13% colleague referral and 9% other.</td>
<td>More than 75% indicated a CSH tactic as the successful marketing effort to promote registration. Opportunity to leverage collegial relationships in future marketing messaging.</td>
</tr>
</tbody>
</table>
Instructions: Identify an evaluation process for each data source identified as a data component of your SMART marketing objectives.

1. Using your responses to the first and second questions on the Evaluation Strategy Worksheet on page 34 of Step Two, list each of the data sources identified in the left column of the matrix below. These data sources should be tied to determining the success of each of your marketing objectives. Additionally, include data sources from each of the tactics that you want to evaluate, outlined in your Tactical Plan on page 44 of Step Three. You may have to prioritize the data collection and review only a few marketing tactics based on your time and available resources. Consider prioritizing data review of the tactics that have the widest reach within your target audience or those tactics that have a significant development cost to be sure you are receiving a return on your marketing investment.

2. Answer the following questions for each of the identified data sources in the right column of the matrix below:
   - How will you collect baseline data?
   - How will you collect post-marketing data?
   - Where will data collection be kept so that each team member can contribute data as gathered?
   - How often will you review the data to determine success of your marketing tactics or needed strategy adjustments?

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Evaluation Process and Collection</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Baseline Data:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Post-Marketing Data:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Data Collection Location:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Data Review:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Evaluation Process and Collection</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Baseline Data:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Post-Marketing Data:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Data Collection Location:</strong></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Data Review:</strong></td>
</tr>
<tr>
<td>Data Source</td>
<td>Evaluation Process and Collection</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Baseline Data:</td>
<td></td>
</tr>
<tr>
<td>Post-Marketing Data:</td>
<td></td>
</tr>
<tr>
<td>Data Collection Location:</td>
<td></td>
</tr>
<tr>
<td>Data Review:</td>
<td></td>
</tr>
<tr>
<td>Baseline Data:</td>
<td></td>
</tr>
<tr>
<td>Post-Marketing Data:</td>
<td></td>
</tr>
<tr>
<td>Data Collection Location:</td>
<td></td>
</tr>
<tr>
<td>Data Review:</td>
<td></td>
</tr>
<tr>
<td>Baseline Data:</td>
<td></td>
</tr>
<tr>
<td>Post-Marketing Data:</td>
<td></td>
</tr>
<tr>
<td>Data Collection Location:</td>
<td></td>
</tr>
<tr>
<td>Data Review:</td>
<td></td>
</tr>
<tr>
<td>Baseline Data:</td>
<td></td>
</tr>
<tr>
<td>Post-Marketing Data:</td>
<td></td>
</tr>
<tr>
<td>Data Collection Location:</td>
<td></td>
</tr>
<tr>
<td>Data Review:</td>
<td></td>
</tr>
<tr>
<td>Baseline Data:</td>
<td></td>
</tr>
<tr>
<td>Post-Marketing Data:</td>
<td></td>
</tr>
<tr>
<td>Data Collection Location:</td>
<td></td>
</tr>
<tr>
<td>Data Review:</td>
<td></td>
</tr>
<tr>
<td>Baseline Data:</td>
<td></td>
</tr>
<tr>
<td>Post-Marketing Data:</td>
<td></td>
</tr>
<tr>
<td>Data Collection Location:</td>
<td></td>
</tr>
<tr>
<td>Data Review:</td>
<td></td>
</tr>
</tbody>
</table>
Using the data sources identified in your *Evaluation Planning Process Worksheet* on pages 57 and 58, collect data from each source for your baseline and post-marketing timeframes. Compare the data, looking for significant changes. Don’t hesitate to collect data even if you do not have a baseline report. You can use these data as a baseline for the following year’s marketing efforts.

Reflect on your marketing objectives and use these guiding questions for data review:

- Does your data demonstrate that the measurable component of your SMART marketing objectives has been achieved?
- If you have fallen short of the achieving the outcome stated within the objective, does the data give you a hint about the reasons the objective was not successful?
- What information can you use to improve future marketing efforts?

<table>
<thead>
<tr>
<th>Data Source</th>
<th>Baseline</th>
<th>Post-Marketing</th>
<th>Notes from Data Review</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*TOOL: Evaluation Data Collection & Review Worksheet*
Overview
The state department of education’s CSH team will conduct two informal discussion groups to obtain feedback on our marketing communication efforts for the Coordinated School Health Roadmap training, including the marketing items that we have produced in the past two years. The discussion questions are aimed at participants’ awareness and use of marketing items and are designed to generate informal discussion and not formal data.

The participants will be a convenience sample selected to represent different target audience groups, such as health teachers, administrators, school wellness team representatives, and so on. Informal recruiting for the sample will occur via email and in person at the Annual Meeting. The goal is to conduct two discussion groups, with up to eight participants per group.

The discussion groups will be held over lunch at the hotel during the annual meeting. Jane Doe and John Smith from the state department of education will each facilitate a discussion group, and there will also be a note-taker for each group (e.g., administrative assistant or other staff person).

The discussion questions will concern participants’ awareness of the state department of education’s CSH program and its services, and participants’ feedback on the following Coordinated School Health Roadmap training and other professional development marketing items:

- School Health Advisory Team welcome packet;
- Coordinated School Health Roadmap training save-the-date mailing;
- Three Coordinated School Health Roadmap newsletters; and
- Template for announcing new Coordinated School Health Roadmap training tools via blast emails.
Focus Group Questions

1. Have you heard of the state department of education’s Coordinated School Health (or CSH) Team before today?

2. If yes, how did you first learn about the CSH Team?

The next questions concern some marketing items that the CSH Team has produced. We will give you a copy of each item, and we will ask you some questions about the item.

Coordinated School Health Roadmap training save-the-date mailing

3. Have you seen the item before today? (If you have not seen the item before today, but would like to provide input, please do so.)

4. What, if anything, did you learn from this item?

5. Did this item prompt you to seek out additional information about the topic that the item addresses?

Template for announcing new Coordinated School Health Roadmap training via email

6. Have you seen this type of announcement before today? (If you have not seen the item before today, but would like to provide input, please do so.)

7. Did this item prompt you to seek out additional information about the topic that the item addresses?

Thank you!
Sharing your data

For the most part, your marketing evaluation data will help you know how to improve future marketing efforts. However, you may consider sharing your evaluation findings with funders and administration, which can help you to:

- Demonstrate the results of your program;
- Garner support for future program activities and improvements; and
- Support the need for continued or expanded program funding.

There are many different ways to share evaluation results with stakeholders. Tailor the type and amount of information you share with your audience. Detailed reports are appropriate for internal program staff, agency administrators, contractors, and funding agencies. However, the key to engaging a broader group of stakeholders outside your agency is to share a succinct, clearly written report on primary evaluation findings and explaining how they will be used for program improvement.

Use guidance from CDC DASH’s Evaluation Research Team on communicating your data.
http://www.cdc.gov/healthyyouth/evaluation/share.htm
Let’s market!

We hope that you found guidance to make your marketing work easy and effective through the resources and templates in this toolkit. Effective marketing makes your PD services more successful by getting the right audiences to participate. Our objectives throughout this toolkit were to provide you with the skill to:

- identify the key steps to marketing PD services;
- implement a marketing plan tailored to the needs of the target audiences; and
- access simple and customizable marketing worksheets, tools, and resources.

Marketing can certainly be more complex than indicated in these pages. What is important now is that you act in a systematic and creative manner to promote your PD services to the right audiences, always making data-driven decisions as you update your messages and tactics to keep your audiences’ attention. Your marketing needs assessments and continuous evaluation of your objectives and tactics will provide you with the data you need to be successful!

If you ever feel stuck, pay attention to the marketing messages that grab your eye. Why did you look? What did you notice? And why did you care about the message or product? Take those answers and return to your own marketing plan. Infuse it with new and creative ideas. Congratulations, in advance, for the great marketing work you will do!