How to Market Prevention Programs

Strategies for Successful Promotion of Programs and Activities

California Department of Alcohol and Drug Programs

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"Defending yesterday is far more risky than creating tomorrow."

–Peter Drucker

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A Quick Introduction To Marketing Terms And Concepts

> "Marketing, after all, is really theater. It's like staging a performance. The way to motivate people is to get them interested in your product, to entertain them, and to turn your product into an incredibly important event."
>
> – *John Sculley, CEO, Apple Computer*

Like any other skill or art, marketing is best learned by doing. For this reason this chapter will be short, and will focus on providing meaningful definitions of marketing terms and concepts. When you move on to the next chapters the meanings of these concepts will be reinforced by their practical application to your specific marketing needs. It's important to learn these definitions, because many human services professionals have a negative response to some of the terms—a response that is too often rooted in a poor understanding of what the terms are about.

What is MARKETING? Simply put, marketing is the process of getting customers to buy your products or services. Since your product has to do with promoting healthy decisions and lifestyles, you can use strategic marketing practices to do some real good. You may also find, as have many others, that marketing is a fun way of thinking; fun because it increases effectiveness, supports creativity, and provides avenues for continually tinkering with your services to improve upon them.

Marketing is also about EXCELLENCE. The marketing mindset seeks to understand the needs of beneficiaries *as seen by them*, and to address those needs in an effective manner. Among the challenges faced by those who market prevention programs is how to reconcile the needs of beneficiaries as seen by them, with the demands of other constituencies, who may have an entirely different view of what beneficiaries need. A classic example is parenting programs. Two constituencies, staff experts and the funding source, may believe that certain parents need training to become more effective and nurturing. That vital third constituency, the parents themselves, may have an entirely different perception of what they need. Virtually any seasoned prevention professional can think of similar examples from their own experience.

This manual is going to show you an approach to marketing that fits the field of prevention alcohol and other drug problems. It will help you to reconcile the needs of beneficiaries with the needs of other constituents, and to create programs which are seen as relevant by all critical groups.

The assumptions we have made in developing this manual include:

- Your agency is a nonprofit or government agency;
- You are providing services which are intended to prevent problems related to alcohol and other drug use;
- Your agency relies more on grants and government contracts as sources of funding, than on client fees;
- Someone in your agency has substantial marketing savvy, or you wouldn't have survived long enough to attend this workshop;
- But, your agency has no formal *marketing function*, and those who are skilled at marketing are ***unconsciously*** skilled.

- Even if these assumptions miss the mark, your agency will benefit from applying the principles explored in this manual—*if* you *use* them.

What This Manual Covers

By the time you have completed working through this manual, you will have gained an appreciation of the art and power of marketing. We think you will have several "Aha!" experiences, in which you say, "That's what I've been doing all along!" You will be skeptical of some of the ideas and concepts, but will eventually become convinced that most of them are not only useful, but exciting. You will learn to weave your natural marketing inclinations together, creating an integrated fabric known as a *strategic plan*. And we predict that you will become impatient to put what you are learning to practical use immediately.

You will learn:

- Key marketing *concepts* and definitions;
- How to *segment* your market;
- How to define a *niche* for your product;
- How to *package* your product for more effective marketing;
- A process for *strategic* planning;
- A method of creating a *tactical plan* for immediate use;
- A way to develop a *budget* for marketing costs;
- How to *evaluate* your marketing efforts;
- And more.

Marketing And Prevention

Prevention *is* marketing. It is the marketing of health-enhancing behaviors. There is a special term for this type of marketing: *social behavior marketing*.

Traditionally marketing has focussed on methods of convincing consumers to exchange money for goods or services. Marketing *goods*, and marketing *services* are two important categories of marketing, and they are the categories upon which this manual focuses. Getting your program to beneficiaries (or getting beneficiaries to your program) *always* involves marketing your products and/or services. After your beneficiaries are engaged with your program, you begin social behavior marketing through your day–to–day prevention programming.

The reason the primary focus of this manual is on program marketing, rather than social behavior marketing, is because the science and art of prevention *is* social marketing. Any time you read an article, manual, research report, or book describing a prevention program and how it works you are reading about social behavior marketing. If you are a prevention professional, you are an expert in social behavior marketing. As you develop your expertise in program marketing you will find that you become better at marketing social behaviors also.

How Important Are You, Anyway?

> "Prevention is an important task. The future of our children and our society depends upon our success."
>
> *- A Prevention Specialist*

> "When I left the prevention field and returned to classroom teaching, it was like a breath of fresh air. I had forgotten what a small part of the world prevention is, and how irrelevant it seems to most people."
>
> *-An Ex-Prevention Specialist*

It is easy to lose perspective about how intense the competition is for the attention of those who you would like to participate in your program. Powerful social forces support values, priorities, and behaviors that conspire to deflect almost all of the interest your participants might potentially have in your services. Yet many prevention professionals we know suffer from at least some of these faulty assumptions:

- Because the public is so aware of the drug crisis, and polls show that drug abuse is major concern of voters, members of the public value prevention as much as prevention professionals do;
- Potential beneficiaries will go to great lengths to inform themselves of the activities and opportunities presented by prevention programs;
- Once informed about an agency's prevention services, virtually every decent, reasonable community member will want to support the program in some way;
- Furthermore, they will ignore any inconveniences that are built into program design, such as materials which are poorly written, irrelevant, or difficult to use, lack of parking space, uncomfortable facilities, long driving distance, and so on.
- Those who use the program will be tolerant and forgiving of errors, shoddy service, and poor standards — because, after all, the *cause* is so important.
- Competition is not a very important consideration for program planning and service delivery. After all, our intentions are pure; we are collaborators, not competitors.
- People, both prevention professionals and those who use our services, are essentially healthy themselves, and can be expected to be open, honest, and supportive of our efforts.

As you develop your marketing savvy, you will be less influenced by this kind of faulty reasoning. You will learn to see your services as your clients might see them. This skill—seeing your services as others see them—will contribute to a steadily growing professionalism in: a) how your agency plans its services; b) how competently they are managed, and c) how effectively they help the agency to achieve the goals specified in its mission statement.

Marketing Concepts and Definitions

Marketing: The process of getting your clients and customers enthusiastically involved with your products or services.

That's what we say marketing is. It is the definition that this manual is based upon. To create a broader context, here are a few definitions from other sources:

For-Profit Business Sources Say:

> "A tightly integrated effort to discover, create, arouse, and satisfy customer needs."
>
> –Theodore Levitt, *The Marketing Imagination*

> "Marketing is everything you do to promote your business, from the moment you conceive of it to the point at which customers buy your product or services and begin to patronize your business on a regular basis. The key words to remember are everything and regular basis."
>
> – Jay Conrad Levinson, *Guerilla Marketing*

Not For Profit Organization Sources Say:

> "One manager we know likes to describe the marketing department as "the conscience of the organization," since its work includes determining the needs and concerns of the various constituencies served by the organization, and ensuring that those concerns are addressed in the design and delivery of programs."
>
> –Christopher Lovelock and Charles Weinberg, *Public and Nonprofit Marketing, Second Edition*

> "Marketing is the process by which an organization changes itself to what people will pay for."
>
> –Robert Blackwell,

Quoted in the NonProfit Times, August 1990

Humorous sources say:

"The Science of Peddling. Prior to it's invention, manufacturers made and lost fortunes without knowing how they did it. They still make and lose fortunes, but at least they know exactly what they're doing and can count upon professional expertise to do it."

–Steve Ende, *How To Talk Marketing Real Good*

Market (noun): A group of customers and/or potential customers, and/or the geographic area in which a product is sold. When a market is very highly defined so that it refers to a small subset of clients, it is referred to as a market *segment.*

Market (verb): The act of implementing a marketing strategy.

Advertising: Use of print or electronic media to promote your products. Private–pay alcoholism and drug addiction treatment programs are among the most aggressive advertisers on the American business scene. So far, prevention programs have taken a lower-key approach to advertising. Some of the tactics which are used are direct mailing of promotional materials, promotional bumper stickers ("D.A.R.E. to keep kids off drugs"), and newsletters. In the future we think there will be increased use of the yellow pages, advertisements in trade journals for specific target populations (such as school administrator association newsletters and prevention oriented periodicals), and more aggressive public relations campaigns which incorporate higher-profile advertising strategies.

Communications: This can be broken into four topics, which include promotion, advertising, publicity, and public relations. Each is discussed separately below, but for a quick definition, here's a description that's hard to beat:

"...If the circus is coming to town and you paint a sign saying, 'Circus Coming to

> Fairground Saturday,' that's advertising. If you put the sign on the back of an elephant and walk him into town, that's promotion. If the elephant walks through the mayor's flower bed, that's publicity. And if you can get the mayor to laugh about it, that's public relations."
>
> – *Readers' Digest*

Competition: You are in a competitive business. On a strictly financial level, you compete for grants and contracts, for client fees, and for donations. But competition goes far beyond this. You are also competing for the attention of people who are daily inundated with far more information, facts, opinions, images, ditties, and pitches than can possibly be absorbed. And you can bet your socks that some of the sharpest marketing minds in the country are among your competitors.

It is important to recognize that your competition is not limited to other prevention agencies. They are merely the tip of the iceberg. *Any* product or service that lays claim to the same piece of your customer's budget, time, commitment, or attention that you are after is a competitor. For example, school–based prevention agencies have faced increasing competition from state-mandated proficiency examinations. Schools must be increasingly attentive to "the basics," and are spending much of their discretionary budgets on such programs. Savvy school-based prevention marketers have responded by positioning their services as a support to school proficiency goals —"Stoned students don't learn as well," is their refrain.

As this manual is being written there is an unprecedented surge of new funding being allocated to prevention efforts. Do not make the mistake of thinking that this creates a "sure thing" for funding existing programs. Where there are new opportunities, there will be new providers. Entrepreneurs will enter the prevention business as they have every other field where there were dollars to be won. And among them will be marketing savvy competitors who will blow complacent, established firms right off their turf. If you haven't taken care of the needs of your funding sources in the past, they aren't likely to throw "new" money your way. As with other aspects of the prevention business, your marketing must be proactive if it is to make a difference.

We wish to stress that your competitors can help you to achieve excellence. We urge you to remember to learn from them, not to sabotage them; to outperform them, not to denigrate them; and to in every way endeavor to achieve superiority in goods, services, and program outcomes. If you respond to competitors in this manner, their presence will continually *strengthen* your program.

Here is an interesting quote to consider, from an individual who is responsible for distributing a great deal of funding for prevention programs: "If a service provider has bad things to say about other service providers, I consider that a threat to building a cohesive system... I will look elsewhere to spend my money."

Customer: The person who makes the decision to purchase your product. In this manual—and in the prevention field—several terms are used interchangeably; all mean approximately the same thing as "customer." These include: beneficiary, participant, client, fundors, target population, high-risk group, constituents, and so on.

Distribution: One of the four elements of the "Marketing Mix." How do customers gain access to your product? Do customers come to you, or do you deliver the product to them? If you provide counseling services, customers may be required to come to your facility. How accessible it is may be as important as any other single factor for predicting your success.

Most prevention work seeks to take services to the customers. This is not as simple as it sounds. You may, for example, take counseling services to a school site as a component of an early intervention program. That's fine, but there are many distribution problems still to solve: how to coordinate referrals, deal with confidentiality, get students to attend, and so on. Or for another example, your prevention program may be making educational presentations in support of a public initiative that would affect distribution of alcohol. Where are your most influential audiences? If you are gathering signatures on a petition, where can you gain the best access to large numbers of registered voters?

Distribution problems are critical, and must be considered when you design a marketing program.

Exchange: What you give to your customer and what your customer gives to you in return. "Exchange Theory" is considered one of the foundations of modern marketing:

> "(The exchange concept) focuses our attention on the quid pro quo of any given marketing activity: what is in it for marketer and customer, or for marketer and donor? ...what benefits do consumers seek to obtain and what costs (of all kinds) are they prepared to incur to get them?"
>
> —*Christopher Lovelock & Charles Weinberg*

Four P's: See "Marketing Mix."

Image: A working definition of your image is *how your customer perceives your organization*. One of the most important goals in your marketing efforts will be to secure customer *confidence*. The confidence that a customer places in your products is largely based on your organizational image. Your image includes such intangibles as professionalism, trust, reliability, relevance, responsiveness, impact, and sociability. This image is formed over time by many small impressions. A favorable image is an invaluable asset; an unfavorable one will usually cripple the effectiveness of your program and have a negative impact on future funding.

Leveraging: Leveraging means gaining credibility and impact for your marketing efforts by associating them with an entity which has established credibility in the minds of your prospects. An example is gaining co-sponsorship for a workshop from one or more other organizations with a higher profile and well-established credibility. Project DARE has leverage built in through it's association with law enforcement.

Marketing Information System (MIS): Any systematic effort to gather and maintain useful information for the purpose of developing your marketing strategies. A partial list of components which might be included in the MIS of a small to medium non-profit include:

- Client files, detailing services provided to each client;
- Competitor files, containing intelligence gathered on competitors, such as product samples, promotional materials, and so on;
- Statistical and research data which can be used to support the approaches your program uses;
- Fiscal data and staff time use studies for establishing the costs of your services and for use in cost–control measures and pricing strategies;
- Evaluation data, including program effectiveness, and evaluations of marketing strategies (two very separate, yet fundamentally related evaluations);
- Grant proposal files, including successful and unsuccessful proposals, and materials analyzing potential grantors.

Marketing Mix: The marketing mix is the interaction between four main components of a marketing strategy. These components include product, pricing, distribution, and communications. Each is discussed separately in this section. By considering the components together, and designing a campaign so each component interacts harmoniously with the others, it is possible to create a synergistic effect, maximizing the impact of your marketing effort.

Many marketing workshops for the prevention field have described the marketing mix as "The Four P's.:" Product, Price, Place, and Promotion. Because two of these terms are limiting, we don't use the "Four P's." "Place" is only one part of the distribution component of the marketing mix. And "Promotion" is just one of several approaches to communications;

Media: The media are important avenues for communication with your customers and prospects. Effectively using the media is an art unto itself. Media include print media, such as newspapers, billboards, magazines, and so on; and electronic media such as television, radio, videotape, and interactive computer programs. Typical uses of media in marketing include: appearances on radio and television interviews and talk shows; distribution of media releases (also known as press releases) about important events; making public service announcements about program services; and so on.

Niche: The position in the local economic ecology that your product occupies. As in a biological system, niches are always subject to threats by predators. They can be occupied only if they are suitable for your organization; a fish should not attempt to occupy a bird's nest, unless it first grows wings. Environmental changes (such as new technologies, changing demographics, updated research findings, etc.) may affect the niche occupied by your organization, requiring an ***adaptive response***. Failure to appropriately choose, adequately defend, and dynamically adapt to environmental changes in one's niche has led to the extinction of many species—and many organizations. If you have become too comfortable, beware! There are many predators lurking about.

Packaging: There are several parts to packaging. One is how you dress your product up to make it visually appear desirable to your customers. Another part of packaging is concerned with distribution; is your product of a convenient size, shape, and weight to display and to move to where it will actually be used? (Please note that if your product is your individual expertise, then *you* —your appearance, manners, and demeanor—are part of the package).

Yet another part of packaging is how you fit your product into the context of other products, including other products of yours, of other vendors used by your customers, and even of your competitors. (This concept is explored in more detail elsewhere in this manual.)

Point of Purchase: The physical location at which a customer makes a decision to buy your product. In retail marketing the point of purchase is usually in a store; you have seen many "point of purchase displays," usually large cardboard structures touting the benefits of a particular tortilla chip or brand of vodka.

For prevention, the point of purchase is usually of an entirely different sort. In fact, it is frequently in the customer's office. Therefore, your point of purchase display must be of a different type (unless you think that mailing cardboard cutouts of your executive director will do the trick). Brochures, price lists, product descriptions, and sample materials must be of high quality and must demonstrate that they meet a need of the prospects. In addition, the person representing the agency must be *genuine*, and communicate *trustworthiness* and the flexibility to respond to the concerns of the customer after the customer decides to make the purchase.

Your office should also have point of purchase materials. These are display items intended to increase client confidence, demonstrate your competence, and, if possible, provide an opportunity to examine your products. You might therefore create a reception area in which awards you have received are displayed, photo albums featuring staff and clients working together are displayed, sample curricula or educational materials are provided for examination, and a well-informed, personable receptionist is available to steer customer's attention to these materials. If you have created such an area, you might consider walking your clients through the display prior to or after meeting with them

Positioning: Establishing a product's image in relation to the images of competing products and services. The position of your program or service is the psychological niche it occupies in a customer's mind. Is it an expensive, "premium" product; or is it an economical, "sensible" alternative? Is it for the many, or for the few? Can it be described as "cutting edge," or is it "a proven, reliable" method? If there were a Positioning Hall of Fame, it would include these famous statements:

- The computer for the rest of us.
- You've come a long way, baby.
- We try harder.
- Tastes great, less filling.
- The Pepsi Generation.
- Ten days and a couple of two-day follow-ups.
- D.A.R.E. to keep kids off drugs.

In the prevention field, an example of an organization that has staked out a clear position is the California Prevention Network. This fairly loose-knit coalition of prevention workers states in its membership brochure that it "...stands at the cutting edge of prevention thought; ...dedicated to improving the quality and effectiveness of prevention programs." The first clause establishes the organizations position *in relation to* the rest of the field; the second establishes the mission of the organization.

Promotions: Activities which directly expose prospective customers to a sample of the product, or which promote the name or image of a product, usually without a direct appeal to buy. Examples include the Goodyear Blimp and use of advertising specialties such as coffee mugs with a logo imprinted on them. If your program has a curriculum, a manual, or a training you wish to promote, you might consider giving free copies to key opinion leaders, decision makers, or journalists.

Pricing: The act of ***strategically*** setting a price for a product; that is, choosing a price in relationship to the other factors considered in developing a strategic marketing plan.

> "Costs, competition, and market demand are the foundations of a pricing strategy. The costs to be recovered set a floor to the price that may be charged; the value of the product to the customer sets a ceiling; and the price charged by competitors may determine where the price should actually be set.
>
> *-Christopher Lovelock and Charles Weinberg, Planning and Implementing Marketing Programs in Nonprofit Organizations.*

Product: Any item that your agency sells. Products may include services; a partial list includes consulting, training, educational presentations, and counseling. Products may be concrete items, such as books, videotapes, and so on.

Fundamental to all marketing efforts is a *quality product*. If you have an inferior product, or one that is not relevant to the needs of your customers, you may be able to sell it – once. But if you want to thrive as an agency, and for your programs to have real impact, you would do well to make sure you have a quality product. The tradition of playing the "numbers game," emphasizing quantity in order to compete successfully for government funding, may have insidiously weakened your product quality. It is important to educate your funding source on the relationship between "quality" and "program success"—and to discuss just what "success" means. We suggest you take a long, hard look at this. Opportunity may be knocking!

Production is the process by which you create your products, and is an important element of marketing. In the prevention business, production may include staff training, allocation of tasks, supervision, design of educational materials, and the quality of the media that educational materials are produced on, to name just a few production variables.

Prospect: A potential customer. If you treat everyone you encounter as a prospect, your marketing efforts may succeed in some surprising directions.

Public Relations activities are those which are intended to present your agency to the public in a favorable manner. The goals are to build ***name and product recognition,*** and to get your customers to view your products as compatible with their own values and needs.

Among examples of good public relations tactics are those agencies which responded to the San Francisco earthquake emergency with around-the-clock crisis services—and ***intentionally*** arranged for favorable press coverage of their efforts. An example of poor public relations is the decision by Exxon executives to prematurely halt clean up efforts after the Valdez disaster in Alaska.

On a smaller scale, public relations includes how your agency responds to customer concerns and complaints, and participation by your staff as official program representatives to various community functions and as panel members. Remember, the first two letters of prevention are "P.R."

Research: Research is considered a large part of the science of marketing. What it boils down to is: ***understanding*** the needs, desires, resources, and values of your ***customers***; the social trends which are shaping their thoughts and values; and the ways in which you can develop, package and position your products responsively.

Sales: Prevention is a battle for the hearts and minds of a people who are daily torn apart by others who stake the same claim. Salesmanship is not an incidental part of prevention; it is a core skill. The programs which have the greatest impact are conceived, orchestrated, and delivered by staff with sales skills.

> "Selling is getting rid of what the organization has. Marketing is getting the organization to have what it can get rid of."
>
> –*Robert Blackwell*

Segment: A tightly defined portion of the universe of your potential customers. For example, the QUEST program focuses its prevention curriculum on grades 7 & 8 in the United States—a marketing decision which was influenced by research indicating that these are the ages when most drug users begin experimentation.

Careful segmentation of your market has remarkable focussing effects on your marketing. You can form more accurate assessments of the needs and values of your prospects. You can tailor your efforts much more carefully, set more specific objectives, and more accurately evaluate effectiveness. For example, the Friday Nite Live program targets a very specific segment: high school students who drive. This targeting has a profound effect upon program design: the media used, the sound system chosen, the music, the models in the slide show, and so on. The result is a product that appeals to its intended audience, and is therefore effective.

For some prevention goals, your segmentation may at times be narrowed down to a single decision maker who controls access to a customer group, or has a great deal of policy making influence.

Strategic: Long-term; Over a year in duration. Here's an analogy, courtesy of the Pentagon: a *strategic* weapon is one that is intended for use on a target very far away, such as a different continent. A *tactical* weapon is intended for relatively nearby use on a battlefield. (Marketers use a lot of terms borrowed from the military; it's open war out there!)

Testing: Testing means doing a reality check of your product by exposing it to people who are representative of those who you hope to sell your product to. Here are some examples:

- For a grant proposal: Have a few people read it and give you feedback; the more similar they are to the proposal reviewers, the better.
- A curriculum: Enlist several teachers to present a near-final draft of the curriculum to their classrooms while your prevention staff observes the reactions of students.
- Prevention legislation: Run your drafts by lobbyists, local legislators, legislative committee members or other experts for feedback.
- A brochure: Have a few "comps" made of your camera-ready copy, and get members of the target audience to react to it. Don't ask them to read it; observe them and see if it is well-enough designed to do the job itself.
- A survey form: Convene a "focus group" of representatives from the group to be surveyed. Ask this group to explain what they think each item on the survey is about. Try alternative phrasings of questions until ***your*** assumptions about the language you are using matches ***their*** assumptions about the language you are using. Further, compile the results from a test run of a limited number of surveys to ensure that the forms used are easily scored and that the data generated are meaningful. For any of this to succeed, however, you must first be very clear about exactly what questions you want answered in the first place.

It is said among marketing pros that the three most important components of product development are testing, testing, and testing.

For More Information

Once you start looking for it, you will become aware that there is a flood of marketing information available. In general, we recommend that you avoid textbooks; the ones we have seen are boring and have a poor word count/relevance factor (a measure we invented while doing the research for this manual). Instead, check out the paperbacks in the business section of any of the chain bookstores. Also, examine the magazine racks for publications offered to business people and entrepreneurs.

We have listed those materials which we find most readable, informative, and practical, in the bibliography at the end of this manual. ***This*** manual is pretty well packed also—read it.

2

Segment Your Market and Position Your Product For Success

This chapter is designed to be interactive; that is, it presents a series of activities for you to complete as you read through it. Doing so should take several hours. You should be able to complete the activities on your own; however, they are designed to be completed in a seminar setting, where you can benefit from exchanging ideas with facilitators and peers.

One goal of completing this chapter is to help you learn to define your services in ways that naturally support creative thinking about marketing. Doing so will prepare you for developing a concrete set of marketing tactics that you will use to enhance the impact of a single prevention strategy used by your program. This enhancement may include: greater reach, impacting more individuals or a greater variety of target audiences; increases in revenue and other resources; and improvement in materials and/or delivery resulting in improved effectiveness. Each of these is a legitimate goal of a marketing campaign.

Your success will be enhanced by focusing on a single product offered by your program, rather than the entire scope of program services. The concepts contained in this chapter are easier to learn when applied to a single product. More importantly, if your agency does not have a formal marketing function established, successfully marketing a single product will help you to demonstrate the importance of marketing within your agency. Nothing is so convincing to skeptics as success;

your focus on marketing a single aspect of your program will lay a foundation for a comprehensive marketing effort for the entire agency.

What This Chapter Covers

When you have finished working through these activities, you will have completed:

- Selection of a *single product* to build a marketing campaign for. Most agencies have several program components, which can often be thought of as separate products;
- An examination of the *identity* of your agency;
- A detailed description of one or more *segments* of your market for the product you have selected;
- An examination of your *niche* in your market, and identification of competitors for that niche;
- An examination of your current *pricing strategy;*
- A *projection of future conditions* which will affect your product;
- And finally, a *position statement* which integrates the findings from completing this chapter. Your position statement will compare the current positioning of your product, with the position you would like your product to occupy in the future. This comparative approach will help you to develop a strategic plan for marketing your product. The strategic planning process itself is covered in Chapter Four.

The chapter is organized into sections, designated by a letter, e.g. "Section A." At the end of the chapter is a section where you will pull together a summary of each section. This summary will form a sturdy foundation upon which your marketing strategies can be built.

A

Choose A Single Product To Market

A.1: Make a list of five products your agency provides.

The term "product" includes services. A product is *any item or activity which your clients exchange their time, money, or other support for.* To ensure your success in developing a marketing plan, these products you list must be those that you have some degree of control over, whether as an executive, project manager or as a line staff responsible for implementing the service or selling, delivering, or maintaining the product.

1.

2.

3.

4.

5.

A.2: Considering the products you have listed above, choose the one that will best lend itself to a successful marketing campaign.

Look for the best combination of: growth potential; solid conceptual foundation; linkage and access to resources which will support implementation of a marketing plan; and potential for integration of this product with other products offered by your agency. This is a *partial* list of factors to consider; you will probably think of others. As you work through this manual, you will develop a marketing plan for the product you choose.

The product you have chosen is:

B

Agency Identity

Your best bet for initiating a successful marketing campaign is to start from where you are. As you learn more about marketing, you will begin to identify times in the history of your agency where great marketing opportunities were missed. It will serve no purpose to try to turn back the clock and work as if you were rebuilding your program from the ground up. The fact is, you probably already have an existing organization that has its unique culture, strengths, and weaknesses. Build from these.

By looking at where your agency, program, and specific product is positioned at this moment, you can begin to gain the sense of perspective that is required for planning sound marketing efforts.

B.1: What Is The Mission Of Your Agency?

In the space below, write down as much as you can remember of the formal *mission statement* (sometimes called *statement of purpose* or *charter*) of your agency.

B.2: How can you restate this Mission using a maximum of seven words?

The purpose of this question is to help you become more concise, and improve your focus. Using gutsy, down-to-earth language may help.

B.3: What is your *personal* Mission Statement?

This is *the* big question, and you either already know the answer, or you probably won't be able to answer it here (at least not quickly). By *personal* mission, we are referring to your sense of vocation, of what your calling or purpose is for your life.

The reason for considering this question is that if there is conflict between your *organizational mission* and your *personal mission,* your marketing efforts will be notably hampered. To be a marketing ace, it helps to sincerely believe in what you are promoting.

B.4: How Does the Product You have Chosen Further The Mission of Your Agency?

Another way of phrasing this question is, "What difference does the product make, and to whom?"

C

Market Description and Segmentation

When you have completed this section, you will have a clear description of one or more subgroups, or *segments*, of your market. This segmentation will help you develop a well-focussed marketing plan.

C.1: Who benefits from this product, and how?
The life circumstances of one or more groups of persons should benefit as a result of your agency providing this product. List these groups, and describe the *benefits* of your product as *they* see them:

Group ***(Market Segments)***	*1.*	*2*	*3*
Benefits of your product or services, as perceived by members of each group			

C2: Demographic/Psychographic Segmentation

Modern marketing frequently employs the concept of *psychographics* instead of demographics. A **demographic** approach identifies segments which are homogenous in terms of income, occupation, race, education, age, geographic location and so on. A **psychographic** approach identifies segments which are homogenous in terms of values, use of leisure time, fashion preferences, musical tastes, and so on. The two methods often identify very different segments.

Chances are, you unconsciously applied one of these methods when you identified the market segments listed on the previous page. It is important to make an effort to explicitly describe the precise characteristics shared by individuals within each segment. Doing so will help you to tailor your products and services to better meet the needs of consumers.

Psychographic Characteristics

Segment (from previous page)	1.	2.	3.
Shared *psy-cho-graphic* charact-eristics (e.g. values, political leanings, use of leisure time, goals, and so on).			

Demographic Characteristics

Segment (from previous page)	1.	2.	3.
Shared ***demo-graphic*** charact-eristics (e.g. age, income, race, religion, education)			

Note: How well is your product matched to the demographic and psychograhic characteristics of each market segment? List any *mismatches* you identify below:

D

Your Market Niche and Competitors

Your niche, or *position* in the market, is generally defined by comparing your services and marketing strategies with those of your competitors. Competitors may be organizations or individuals offering a product similar to yours, or a product which is not similar to yours but which meets similar needs.

For example, your product may be student assistance program development. Direct competition may come from another agency, which may even be located in another state but which is able to effectively compete against local agencies because it has traditionally used a more muscular approach to marketing than your agency has, and as a result enjoys better *name recognition* and higher *credibility*.

Another competitor may be offering a product which consumers feel meets the same needs that yours is designed to meet, although using very different methods. An example might be placement of a policeman on a high school campus, rather than initiating a student assistance program.

Ideas and philosophies are also competitors. For example, relatively unsophisticated analysts commonly agree that more information about the harmful effects of alcohol and other drugs will dissuade youths from using them. This idea easily gains popular support, and can compete very effectively against approaches (such as student assistance programs) that seek to intervene through systemic changes.

D.1: Who are your competitors?

Complete the lists below (they may be read as two separate lists, rather than two columns on a single list):

Agencies/Entrepreneurs	Ideas/Philosophies
____________________	____________________
____________________	____________________
____________________	____________________
____________________	____________________
____________________	____________________
____________________	____________________
____________________	____________________
____________________	____________________

Which of the competitors listed above are of the greatest concern to your agency? **Rank order** the top five by placing numbers next to them.

What *features* of your product compare most favorably to the principal products of your top–ranked competitor? (It can also be helpful to complete this list for *all* competitors.)

☐ Customer Service	☐ Staff Expertise	☐ Evaluation Design
☐ Research Support	☐ Staff Sociability	☐ Cost/Benefit
☐ Attractive Packaging	☐ Ease of Implementation	☐ Prestige of Product
☐ Documentation/Reports	☐ Demographic Fit	☐ Psychographic Fit
☐ Training Support	☐ Political Acceptability	☐ ____________

D.2: In the table below, choose three competitors and consider their relationship in the market to your agency.

This will help to further define your *position*.

Competitor	**1.**	**2.**	**3.**
Segment(s) Affected by Competitors			
Comparison of Cash Cost to Client			
Emotional, Social, Time Cost Comparison			
Client Benefits Comparison			
Agency Credibility Comparison			

D.3: In what geographic area is this product made available? Define recognized geopolitical boundaries. This is your present geographic market area:

D.4: What are the advantages, for marketing purposes, of these geographic boundaries?

D.5: What are the disadvantages, for marketing purposes, of these geographic boundaries?

D.6: How was the decision to work within these geographic boundaries made? Who made the decision, and when? Are the reasons for remaining within them still relevant, or have they become obsolete?

E

Pricing Strategy

Pricing strategies have a profound influence on decisions consumer make about purchasing products. They affect how a client perceives the *value* of the product, and by extension how a client perceives your organization.

There are four main variables to consider when establishing a pricing strategy for cash client fees:

1) *What it costs* your agency to provide the service. This determines the minimum amount you must charge, after other sources of income have been subtracted.

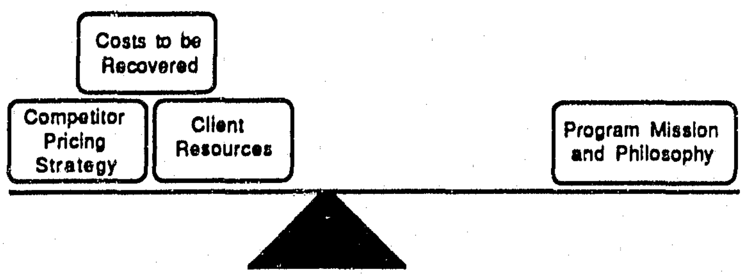
2) *Client resources*. The maximum amount you can charge is determined by the limits of the client's resources.

3) *What the competition charges*. The final price you set will be influenced by the fees your competitors charge.

4) *Your mission and philosophy*. Non-profit organizations are supposed to be low-cost. Furthermore, many non-profit managers, staff, and board members are sincerely motivated by a service ethic. Keeping cash costs to clients as low as possible is a legitimate and perhaps even crucial endeavor.

Many program managers have learned that the agency's ability to accomplish the program mission is in some cases easier when the program charges a moderate fee. Clients may value the services they receive more highly if they have paid for them. Organizations are more likely to be influenced by the recommendations of paid consultants, than by free advice. Staff may strive to achieve higher standards of professionalism when they know that the client is paying cash for the services they are providing.

The trick is to balance program philosophy with the first three criteria:



E.1: Costs to Be Recovered (Your Agency Costs):

Here is a way to estimate the unit *cost to your agency* of providing the product. An example is provided on the next page.

a) Unit description:______________________________

b) Units provided annually:________________________

c) Total annual expenses:__________________________

d) Cost per unit (expenses ÷ annual units):______________

The cost per unit is the minimum fee you must charge. However, this fee can be spread between subsidizers (such as county contracts) and clients.

e) Percentage subsidized (grants and contracts): __________

f) Minimum percentage to recover from client

(100% - *e*): __________

g) Cost per unit to recover from client (*f* x *d*): __________

Example

a) Unit description: Prevention consultation, one hour

b) Units provided annually: 1,152

c) Total annual expenses: $120,000

d) Cost per unit (expenses ÷ annual units): $104.00

e) Percentage subsidized (County Contract @ $80,000): 66%

f) Minimum Percentage to recover from client: 33%

g) Cost per unit to recover from client: (33% x $104): $34.32

E.2: Client Resources

This is where in-depth research into demographic characteristics of your client is important. How much can they afford to pay, and how much are they willing to pay? The answers determine the ***maximum*** amount that you can charge. Here are some of the question you might research:

- If your client is an **organization**, which budget line item will they pay from? How much funding is allocated to that line item? What other services must be paid for from it, and what are the costs of these services?

- If your client is an individual, how much "disposable" income does a member of their **demographic** market segment typically *have available* for products similar to yours?

- If your client is an individual, how much "disposable" income does a member of their **psychographic** market segment typically *decide to spend* on products similar to yours?

E.3: Competitor Pricing Strategies

How much do your competitors charge each market segment for products and services which compete with yours?

	Segment:	Segment:	Segment:
Competitor: Product: Price:			
Competitor: Product: Price:			
Competitor: Product: Price:			
Competitor: Product: Price:			
Competitor: Product: Price:			

E.4: Agency Mission and Philosophy

Will your agency mission and philosophy be best served by minimizing, maximizing, or moderating client fees? Review the table below and place a check in the box next to each consideration that fits with the vision, mission, and goals of your agency. Be sure to incorporate what you learn into your final pricing strategy.

Minimum Fee	**Maximum Fee**	**Moderate Fee**
❑ Accessible to poor ❑ Avoids competition with private enterprise ❑ Lower costs than competitors ❑ Best case for support from community donations ❑ Other:	❑ Maximum client commitment required ❑ Enhanced prestige of participation ❑ May appeal to high-level decision makers ❑ Maximum performance pressure on program staff and management ❑ Psychologically positions product as *of **superior** value* to competitor's products ❑ Other:	❑ Accessible to middle class; sliding fees can be used to increase access to poor ❑ Some client commitment required ❑ Moderate performance pressure on program staff and management ❑ Psychologically positions product as *of **equivalent** value* to competitor's products ❑ Best case for support from grants and contracts ❑ Other:

E.5: Hidden Costs (non-cash costs)

Even if you decide not to charge any *cash* client fees, there is *always* a cost. The checklist below provides some examples of costs *as seen by the client*.

Group:	1.	2.	3.
Costs and Liabilities (as perceived by group members):	❑ Stigmatization ❑ Time away from work or school ❑ Time away from family ❑ Traffic; other transportation costs ❑ Emotional Drain ❑ Unpleasant environment ❑ Risky environment (high crime area) ❑ Adminstrative hassles ❑ Political vulnerability if partnership fails ❑ Increased workload ❑ Social or Occupational Stress from trying something new ❑ Other:	❑ Stigmatization ❑ Time away from work or school ❑ Time away from family ❑ Traffic; other transportation costs ❑ Emotional Drain ❑ Unpleasant environment ❑ Risky environment (high crime area) ❑ Adminstrative hassles ❑ Political vulnerability if partnership fails ❑ Increased workload ❑ Social or Occupational Stress from trying something new ❑ Other:	❑ Stigmatization ❑ Time away from work or school ❑ Time away from family ❑ Traffic; other transportation costs ❑ Emotional Drain ❑ Unpleasant environment ❑ Risky environment (high crime area) ❑ Adminstrative hassles ❑ Political vulnerability if partnership fails ❑ Increased workload ❑ Social or Occupational Stress from trying something new ❑ Other:

F

Forecasting the Future–Market Conditions and Opportunities

By forecasting the future we can anticipate changes in market conditions, and plan a *proactive* response to these conditions. The best marketers develop campaigns that work with other trends to help shape the future. It is interesting to note that shaping the future is precisely the business of prevention programs. Since shaping the future is what prevention is about, we must learn to forecast the conditions which will affect our services.

Forecasting inevitably has some of the characteristics of crystal ball gazing: what we can see is hazy and murky at best; and our most accurate predictions are those which are based on acutely observing what already exists at the moment. The next sequence of questions will help you to do so.

F.1: What trends are driving organizational change within your agency? Consider funding sources, political shifts, personnel changes, leadership style and vision, client response to present services.

F.2: What are the trends which will affect the demographic and psychographic segments you are targeting? Consider changes in economic status, age distribution, immigration, education, political and values orientation, and so on.

F.3: What are the trends in the *prevention field* which will affect your product marketing strategies in the future? Consider current research, political climate, staffing qualifications and patterns, emerging organizational trends (e.g. collaborative efforts, increased private industry involvement), and legislative trends.

F.4: What are the *broad social and cultural trends* in the United States which will affect your product marketing strategies in the future? Consider shifts in values, priorities, uses of leisure time, types of industry, and socioeconomic trends; particularly as these factors affect alcohol and other drug use and social responses to such use.

F.5: What trends have you noticed in your *personal journey/vision,* both as a prevention professional and as an individual, which will affect your drive for marketing your product? Consider how your philosophical orientation may have changed over the years. Also, what approaches to prevention programming you support, and how these approaches have changed or not changed.

F.6: How will your *product itself* shape the market in your region?

Consider trends in customer loyalty, especially as they relate to the degree of investment current customers will make as they use your product. Will you be offering upgrades or other support for your product? Each time you do, you create another opportunity for your customer to increase their investment, and therefore their loyalty.

F.7: What are the trends *within the organizations of your competitors* which will affect both yours and their product marketing strategies in the future?

Consider how responsive these organizations have been to the demands for change. Have they been flexible about what products they offer, and how they are packaged? Has the "style" of their products changed, or do they tend to stick to a product and a particular style? Have they been able to respond to research on the state-of-the-art? Is their packaging sophisticated? How about staff qualifications and skills—any trends in how competent their people are?

F.8: Extract the *five factors* from among the trends above, which will have the greatest impact on your marketing efforts. List them below:

1.______________________________________

2.______________________________________

3.______________________________________

4.______________________________________

5.______________________________________

Marketing Strategy: Look for Opportunities

There is *always* a chance to improve upon your marketing. Here are several common avenues to do so:

- Your *products and services* could be improved;
- Your *physical presentation* (dress, social skills, office location and decor) could be improved;
- Your *market segmentation* could be improved. For example, you may be able to identify new groups to whom you have not previously marketed; or you may be able to identify a very narrow segment of a few decision makers who you could become the focus of your marketing strategies. Remember this rule: 80% of your success will come from 20% of your clients. Focusing 80% of your marketing energy on that 20% could make a big difference.
- Your *packaging* could be improved. Dressing your product differently, or presenting it in a different context (e.g. linked with other products, such as offering a curriculum only to those who attend a 3-day training, or positioned as a solution to other problems, as in "family life" curriculum rather than "sex education.");
- Your *communication* could be improved. You may have an excellent product which is languishing simply because your market is unaware of it.
- Your *pricing strategy* could be adjusted. A significant increase or decrease in costs to clients will strongly influence their perception of the quality, accessibility, and credibility of your product and (more importantly) of your agency.
- There may be one or more "wild card" ideas for how you can market your product—strategies, segments, and positions—that are so far removed from tradition that they do not easily occur to you. For example, a scientist at 3M company developed a glue that didn't stick very well. The company was going to throw the product out, but someone noticed that workers in company offices were using the glue to

temporarily hold notes in place. A new product—Post-It Notes—was born.

F.9: List seven ways you can improve upon your product —it's content or how it is presented. *Little things count.*

1.____

2.____

3.____

4.____

5.____

6.____

7.____

F.11: List *accessories* that you could develop for your product, or other products that it could be linked to, in a repackaging strategy:

1.____

2.____

3.____

4.____

5.____

6.____

7.____

F.10: Identify the segments of your market that have used your product the most in the past. Be specific; use names if you know them:

1.____________________________________

2.____________________________________

3.____________________________________

4.____________________________________

5.____________________________________

6.____________________________________

F.12: Are there any groups that might be receptive to your product (with or without modification), but who you have not attempted to market the product to?

Group	Potential Fundors	Product Modification Required (if any)

Section G - Product Positioning Strategy

In the next few pages, you will summarize the information from this chapter into a *positioning strategy.*

Based on the tables you completed in the preceding pages. This strategy will include where you are *now*, as a foundation to build upon; and where your product should be positioned for best success *one year from now.*

Product

G.1: Describe the *Product* (refer to page 21):

G.2: State how this product furthers the *Mission* of your agency (refer to page 23):

Segmentation

G.3: Who benefits from your product, and how? (refer to page 24):

G.4: What are the chief demographic and psychographic features of your market segments (refer to page 25 & 26):

G.5: What are the geographic limits within which your product will be marketed? (refer to page 30):

Competition

G.6: What are the *main sources of competition* against your product? (refer to page 29):

G.6: What *features* of your product compare most favorably against your competitors product? (refer to page 28):

Pricing Strategy

G.8: What are the *costs to be recovered* by your agency? (refer to page 32):

G.9: What *cash costs* can your clientele afford to pay? (refer to page 33):

G.10: How much do your competitors charge? (refer to page 34):

G.11: Considering the factors above and your agency mission and philosophy, what cash cost strategy will you use? (refer to page 35):

G.12: How will you *control non-cash costs* to clients? (refer to page 36):

Trends and Opportunities

G.13: What *trends* are affecting market conditions? (refer to pages 37–40):

G.14: How will you continue to *improve on* and *accessorize* your product? (refer to page 42):

G.15: What *market segments* will receive the most *focus* from your marketing efforts? (refer to page 43):

Conclusion:

In Chapter Two you have developed some basic information to guide your marketing strategies. Section "G", Product Positioning Strategy, summarizes this information. We suggest that you use section G as an outline to create a brief narrative (one typed page maximum) that outlines your marketing strategy in simple terms.

In the next chapter, you will read about 100 marketing tactics. As you read, evaluate each tactic to see if it can be used advantageously for establishing the position of your product in the market, and for enticing potential clients to become involved with your program.

3
One Hundred Tactics

This chapter describes useful and effective marketing tactics. The chapter title is somewhat misleading because within these 100 tactics there are over 250 practical, proven ideas you can put to work immediately.

We recommend that you use the *Tactic Rating Sheet* (see Appendix A, pages 168 & 169) when reading this chapter. As you review each idea, note on rating sheet how useful you think it will be. This will help you to select those you want to include in your annual marketing plan. Here they are:

Section A: Tactics For Positioning

1
Carefully Choose Your Program Name

Does your program name communicate the image that you desire? There are many names available, some of which are good, and some which are not so good. Factors to consider: Is your present program name well known, and if so, what is the reputation associated with it? Does the name of your program indicate anything about your services or purpose? If you use an acronym, is it awkward and forced, or does it make a clear point? Has the range of services offered by your organization expanded beyond the scope of your original name? Changing a program name should not be taken lightly, but in some instances it can be an important and helpful strategic decision to do so.

Some of the best names are those that say exactly what the purpose of the program is. One good example is *Western Center for Drug Free Schools and Communities.*

2

Show Your Strategic Plan

The first time we used this approach we were genuinely surprised at how positive the response was. We had developed a simple timeline chart which showed how we believed our services would develop over the next four years, and which included the history of our services for the three prior years (this is part of the strategic planning process which is incorporated into this manual). At a meeting of school administrators we put this on an overhead projector, and provided the same chart as a handout to those in attendance. We then explained each service on the chart, and gave a clear, honest rationale for why we thought our services would evolve the way we predicted.

For example, our strategic plan included an increase in treatment services over the next four years, while decreasing consultation to schools. Our rationale: as schools developed the student assistance programs we had helped them to create, referrals for early intervention and recovery programs would increase. If we were successful consultants, the schools would eventually "own" the S.A.P.s and our presence would not be required. However, the present level of treatment resources would be grossly overloaded if not expanded.

By placing our services in context, we helped our audience to see a bigger picture—one in which our recommendations *made sense* to them. And the (unusual) fact that we were operating from a well–thought–out plan genuinely impressed them.

3

Choose "Blue Chip" Clients As Goals

Ask yourself, "Who are the most desirable clients in my area?" You should be able to identify two or three clients who can:

- provide you with the best access to the most beneficiaries;
- join you as a partner in program planning, promotion, and implementation;
- commit funding to your agency to help you succeed;
- be willing and able to take over the prevention programs you begin, and to run them effectively;
- provide a point of leverage to help you gain access to more beneficiaries through additional client contracts.

Examples of such clients might include major employers, large school districts, and government agencies. These clients may seem completely inaccessible to you, especially if you are fairly new on the block. That's the whole point. Because they are inaccessible to you now, serving them can become an agency goal. A goal of this kind can guide marketing strategies in many subtle and powerful ways.

4

Dress For Success

Part of the appeal of working in human services is that we can escape some of the restricted conditions found in the for-profit sector. Dress codes are generally more relaxed in community-based agencies. But the way your staff dresses makes a lasting impression.

Around our office, staff still joke about the training they attended over three years ago, where the presenter wore shoes but no socks; the content of his presentation is long forgotten. This may be an extreme example, but it illustrates an important point. If people are put off by your appearance, they may never hear your message.

We are not advocating a rigid dress code; that works for IBM, but we operate in a different sphere. What we do recommend, however, is that at a minimum staff have an opportunity to discuss dress and other behaviors related to appearance.

Some other alternatives are:

- Have a "Dress for Success" seminar, presented by a clothing consultant (many department stores will provide a staff member for this service);
- Hire a color consultant to "do colors" for each of your staff. This can not only improve appearances, but can *boost self-confidence,* which itself may dramatically benefit your marketing efforts by the manner in which subtle body language is affected.

5
Be Carefully Colorful

Think about the colors associated with your agency. Colors can strongly affect the perception that others have of your agency. They can help communicate warmth, professionalism, and competence, and to establish attitudes towards your programs. And associating your services with colors will help some individuals to remember more about who you are and what you offer.

To generate a feeling of excitement, the promoters of Friday Night Live developed posters that have very strong, bright colors on a black background. The look is contemporary, and the image communicated is action.

6
Have A Creed

Maintaining the marketplace momentum of your agency, programs, services, and staff can be easier if you have a *creed.* A creed is a simple statement which summarizes the *guiding philosophy* of your agency. Many of the most successful entrepreneurs wrote out a set of beliefs early in their careers, and credit their success at least in part to an unswerving commitment to following these creeds.

For example, one organization we have worked with has this very simple creed:

1. We only accept work and provide services which we *believe* in—our *hearts* will be in our work;

2. We *do* what we say we are going to do;

3. If our clients are not satisfied, we find out *why* and we fix the problem;

4. Our associates are committed to personal *growth*, personal *integrity*, and an approach to *professionalism* in which *humanness* is primary.

The process of developing a creed will usually involve some creative soul–searching, and can be both invigorating and centering. We have suggested the use of small–group brainstorming processes to accomplish many of the ideas in this manual; this is an exception. The creed should be developed by a visionary leader, usually the person who was the founder of the agency. Only these leaders have the dynamic personalities needed to inspire others to adopt the creed.

Section B: Develop Your Niche

7

Know Your Niche—And Fight To Keep It

If you can identify a unfulfilled need for a service or a product, you will identify a natural product *niche.* For example, no one may be offering technical assistance to develop student assistance programs for high schools in your area. *There* exists a natural opportunity for product development.

Think of each of your services as a product, and carefully define what niche within the local prevention system that product occupies. Ask yourself these questions:

- Who is it intended to benefit (beneficiaries)?
- Who has to support it in order for it to be of benefit (customers or clients)?
- Within what geographic area will this service be offered (market area)?
- How is it to be funded (financial resources)?
- What fee will customers or beneficiaries be charged (pricing)?
- Who competes for the niche (other agencies, ideas, political pressures, and so on)?
- How much demand can you competently respond to? How do you assess real limits on availability of staff time, and on levels of staff competence?
- What sales strategies will be used to gain the support of customer?
- How does your product interact with your other products and services, and with the products and services of your competitors?

If you think in ecological terms, you will realize that any niche is open to aggression from a competitor who will try to occupy it at your expense. In marketing lingo, this can result in ***niche warfare***. It's sink or swim time, as the fittest thrives while the less fit merely survives ... if they are lucky.

Pay close attention to your niche. Carefully note when another party stakes a claim. In the health promotion business, they may become a partner with whom you can collaborate and strengthen your position. Your best bet is to link up with them early, while they are in the planning phases of their programs; this will give you an opportunity to influence the shape their services take, often to your advantage.

When a competitor is completely intent on occupying your niche and casting you out, your only alternative is to be better at marketing than your competitor. Sometimes, the difference in quality between your products and theirs is decisive in itself, reinforcing the notion that the *best* marketing strategy is to have a *high quality product*. Comprehensive Health Education Foundation has established a very strong position in school based prevention curriculum. They have done this by creating a very high quality products (*Here's Looking At You 2,000* and *Natural Helpers*, among others), and periodically updating them to maintain that quality.

8

Know Your Clients and Their Needs

Surveys have many uses in marketing. They can monitor client satisfaction, provide input on client needs, and help to identify future needs of clients. They can help your agency to develop a new working relationship, or strengthen and existing one. When repeated on a regular basis they can help to evaluate the effectiveness of your programs and of your marketing strategies. They are a way to help maintain an ongoing *relationship* with your customers.

Comparison of results of an identical survey implemented annually over a period of several years may help to identify trends that could affect your planning. These data can be presented to clients to assist them with program planning By having the data *you* become the authority, and are perceived as an entity with something of immediate value to your client.

There are many types of surveys, ranging from informal conversations, to structured telephone or personal interviews, to questionnaires, and covering diverse topics such as customer satisfaction, response to test products, factual knowledge, and perceptions of your program. Each of these has an appropriate role. The key to their usefulness is strategic planning. When designing a survey, you should be very clear about what data you are looking for and why.

What your survey amounts to is low-cost marketing research—all you pay for is the postage, printing, and staff time to tabulate and analyze the results. You can ask as many questions as you wish, even personal questions as long as the survey is anonymous (which you won't want if you are using the survey to help build your mailing list). The tighter you target your survey, the more useful it will be for marketing research. If, for example, your principle market is schools, you wouldn't conduct your survey at a shopping mall. Instead you would hand out questionnaires at conferences attended by educators from your area, or you would distribute questionnaires directly to the faculty mail slots at a local school.

If your questionnaire is well designed, analysis of the results will tell you exactly what kind of people your target audience is: the magazines they read, what services they want, how they spend their leisure time, why they would want your services, and so on. Actual design and administration of surveys is a science in itself, and requires expert assistance. In addition it is necessary to plan adequate staff time for administration and scoring of the survey results; good design and use of a computerized data base can help immeasurably here.

TIP: Include an introductory paragraph at the top of your questionnaire telling people exactly why you are interested in their answers. The rationale you give should be completely honest; there is no reason to hide the fact that you are trying to give people the best possible and most relevant services to meet their needs!

TIP: Create several different versions of your survey and test each version with groups of at least 10, but no more than 30, respondents. Score each version and analyze the data. This procedure will help you to avoid errors which might otherwise have reduced the usefulness of your survey.

TIP: The Japanese, who are such extremely competent marketers, have a favorite way of doing market research. It is quite simply, and quite elegantly, this: *talk to customers*. Lots of them. On a regular, frequent basis.

9
Offer A Single Solution

The process of marketing your program will often include a meeting at which you are asked, "What do you recommend?" If you haven't thoroughly analyzed the needs of the prospect, you can begin by requesting a period of time to study his situation prior to making a recommendation. Once you feel you have a good handle on what is needed, you can strengthen your presentation by making a single, clear-cut recommendation for action. This will help to define and determine exactly what niche you are filling in the marketplace.

Avoid giving a menu of choices which places the burden back on your client; he is looking for a solution, not another problem to solve. You will improve your standing as an expert by making a single recommendation, and will find that prospective clients are much more willing to contract with you. They will have a better sense of your identity, and this will help to build confidence and unambiguous working relationships.

10
Monitor The Competition

Keeping track of what your competitors do can be extremely helpful both to your marketing efforts and to your overall program management. For one thing, competition can keep your motivation to improve upon your services high. You can also get good ideas from your competitors—after all, they are probably smart and creative people also. Roy Kendall was the leader of PepsiCo during the Cola Wars of the 60's and 70's, from which underdog Pepsi emerged as the leading soft drink producer. He said, "It has always been my goal to know my competitor better than he knows himself."

How do you get to know your competition? Here are several suggestions:

1) Purchase the products of the competitor; go to their workshops and other public events; observe carefully and dissect what you see, try them out, and brainstorm ways you can improve upon them.

2) Get on their mailing list. If they have several lists, get on all of them.

3) Maintain a file on your competitor, and develop a useful way to organize the information on it. Review it periodically to consider what you can learn from them, and how you can use this knowledge to continue your campaign for program excellence.

4) Informally survey your competitor's clients to determine how satisfied they are with the services they are getting, and why or why not. Listen to what to they say, and be determined to be responsive. Responsiveness to client needs and concerns is a hallmark of programs that excel.

5) Have a social lunch with your competitor; you can learn a lot about how a competitor thinks, and even about their strategic planning, over a lunch. You may even want to frankly exchange ideas about where your agencies are heading, if the mutual respect for each other's professionalism is strong enough.

11
Be Selective About Your Clients

When you begin your marketing campaign, it may not seem wise to be selective about which clients you work with. It is tempting to jump at any opportunity to build a new program, especially when you are accountable to the "numbers game" of annual objectives. But if you have taken the time to carefully identify your primary market, some opportunities may turn out to be liabilities.

Each time you say "yes" you commit a portion of your most precious commodity—staff time. Do this enough, and the day will come when the client you have most wanted to serve asks you for assistance, and you are unable to deliver it without breaking other commitments. Resist the temptation to assign staff to projects which have little potential for meaningful impact. A better use of staff time would be wooing the "blue chip" client who can provide the best access to the most beneficiaries, and who will commit additional funding to your program to help it succeed.

Section C: Production Tactics

12

Make A Strong First Impression

A first impression is usually lasting. People usually form their opinions of you during the first three or four minutes after you meet. Therefore, it is important that you use this time to your advantage, to form a strong, positive first impression.

Like any art, the first impression can be improved with practice and conscientious application. Phyllis George, former Miss America, reminds herself before going into any room to "flash them pearly whites." It works for her; it can work for you also.

Part of your job as a program marketer is to help your staff become aware of how they impress others, and to help them learn to *use* the first impression *strategically*. To accomplish this, you might consider these group exercises:

1. Remember a person who immediately made a favorable impression on you when you met. What did that person say? What did that person do? Describe body language, clothing, setting, and so on.

2. Brainstorm a list of specific behaviors (body language, social behaviors, words, and phrases) which would tend to make a good impression on someone.

3. Take turns role playing a first meeting. What feels congruent, and what feels forced and artificial?

4. Discuss whether "artificial" behaviors are worth practicing until they feel natural. Identify a skill that each participant has which at first felt artificial, but which now feels natural (e.g. Driving a car, making eye contact when shaking hands, etc.)

If you frequently make presentations at conferences or to public audiences in your community, have a strong presentation. For many in your audience, your presentation will be their first contact with your agency or the service you have to offer. They will evaluate the entire agency, or the benefits of your service, largely upon how well you present.

13

Remember and Use First and Last Names

An awkward moment which you have probably experienced recently: greeting someone who you have previously met, but whose name you have forgotten. This awkwardness can so sour a situation that your marketing efforts towards the individual involved become more likely to fail.

There is a simple way to avoid this: until you are absolutely certain that the other person knows your name, ***begin each conversation with a reintroduction.*** Use your first and last names. It may be helpful to offer a business card as you do so, especially if the spelling or pronunciation of your name is difficult or complicated. Not only will your prospects remember your name better, but they will probably repeat theirs as well.

14

Build A Modern Toolbox

Computer technology has given us new tools which not only simplify many marketing tasks, but provide us with the opportunity to implement strategies which were previously inaccessible. If you do not have someone with computer expertise on staff, you would do well to begin cultivating it in yourself or in a technically–inclined staff person. You should become competent in these types of applications:

1. Word processing: Useful for bulk mailings, for creating a professional appearance in documents, and for standardizing formats for business letters, billings, and other documents. Absolutely essential for serious grant writing efforts.

2. Databases: A simple ("flat–file") database is essential for mailing list management. A good one will dramatically decrease the time needed to keep a list up–to–date, and will provide tremendous flexibility for creating different kinds of mailing labels and mail–merge set–ups.

   With a *relational database* you can develop comprehensive information management systems which include data on clients, staff time analysis, and automated billing procedures. Relational databases are complex, and are not usually necessary. If you *do* need one, it is often more cost–effective to hire a consultant to develop one for your needs, than to invest the training and time in having a staff member learn how to structure and program one.

3. Spreadsheets: For creating financial models, such as program budgets, and maintaining financial records. We have seen spreadsheets used to track staff time, help to determine how to allocate resources, and to track client billings. Some generate excellent graphs

from the data you enter, and these graphs can be used to generate visual aids for workshops and seminars.

15
Master Desktop Publishing

In the last four years a new, extremely powerful communications phenomenon has swept the country—desktop publishing. There are several ways in which the marketing strategies of service-oriented agencies have been affected.

• Print material which has been produced in—house (rather than at a printer) looks much more professional when done on a desktop publishing system with good page–layout capability and a laser printer. So many agencies are using these systems now, that documents not produced on a desktop publishing system tend to look unprofessional by comparison. These include business letters, funding proposals, flyers, forms, overhead transparencies, slides, workshop handouts, and so on.

• Programs with desktop publishing systems are able to dramatically increase production of printed promotional and educational materials. This affects not only the marketing strategies of an agency, but also it's service objectives and the way in which these objectives are accomplished.

• A new set of skills is now required within a prevention agency. There should be at least one person on staff with these skills, which include knowledge of typography, graphic design, and computer software and systems. At least one prevention agency, the Prevention Resource Center of Boulder, Colorado, has a full–time desktop publishing specialist on staff.

• If you are not using a desktop publishing system, you are at a competitive disadvantage. You should seriously consider investing in one. A good system can be purchased for about $9,000, including computer, monitor, hard disk drive, laser printer, and software. Training expenses will boost this figure, but will be much lower if you invest in an Apple Computer system than if you invest in an IBM or IBM–clone system. Visit a local computer retailer and ask for a demonstration of desktop publishing.

16

Test Products And Services

This is a fundamental rule of marketing: *Always test your products.* What this means is that prior to commiting yourself to offering a particular service or distributing a specific product, test it out on a few clients or prospects first.

If possible, test several different versions. This applies to virtually any service you offer:

- Newsletters and brochures: design and content
- Logo
- Program Name
- Fundraising Letters
- Workshops and Seminars
- Curriculums
- Visual Aids
- Consulting Approaches
- Sales Pitches
- Surveys, Tests, and other data collection instruments.

As a part of the contract under which this manual was produced, we conducted a needs assessment survey. Prior to mailing the survey instrument to our entire mailing list, we created three versions of it and sent each version to a different set of ten randomly-chosen names from our list. This allowed us to determine which version yielded the best return rate. By entering the data from each version into a computer database, we were also able to make adjustments to the form which saved us a lot of time later when we had hundreds of responses to tally.

17
Formally Set High Standards

We have observed repeatedly that many prevention programs have low standards. They hire substandard staff with substandard skills, produce substandard products, and provide substandard services. Their impact is, naturally, substandard as well. Suppose you are able to create a great marketing plan and successfully conduct the promotional phase of a marketing campaign. What will the long–term outcome be if you then provide sloppy or ineffective services?

Recommendation: Ask yourself how your program measures up. Compare it to other prevention programs you are familiar with—both local and remote. Do you find that you have a list of reasons why the quality of your services is not as high as those of others? List your reasons—write them out in detail. Once you have a list completed, put a heading at the top: EXCUSES FOR MEDIOCRITY.

Granted, you may be saddled with circumstances that you cannot easily control; local funding politics can provide many examples of this. But if you are a dedicated program marketer, you will systematically create opportunities to overcome each excuse you have listed. It may take years to do it, but you will, because you know that in the long run, it is the quality of your programs, products, and services that will determine how effectively you serve as an agent for positive change.

Areas to focus on for quality control:

- Staff skills and professionalism
- Products (sound theoretical foundation, practical to implement, built-in evaluation opportunities, packaging, training and upgrade support, aesthetic appeal, etc.)

- Services (workshops, seminars, consulting, etc.)
- Client Service (response to expressed needs, complaints, requests, etc.)
- Record Keeping
- Receivables Billing

18
Package Your Products

Packaging is one of those intimidating words that marketing professionals with MBA degrees from Stanford use. Don't let that put you off. For drug prevention programs, packaging simply means how you create a context for the success of your product. We recommend that you carefully define how each service that your organization offers is packaged, and see if you can improve upon it.

For example, an effective curriculum package might include:

- Careful attention to design details, including typography, paper printed on, choice and use of colors, graphics, binding, visual aids, and other learning tools;
- Informative and compelling advertising;
- Research during curriculum development to verify effectiveness and practicability;
- Training for teachers and other curriculum implementers;
- An upgrade policy to give curriculum users access to new materials as they are developed (which, of course, implies commitment to continuing development of the curriculum);

- Guarantees and recourse for complaints about the curriculum training (e.g. "Your money back if not completely satisfied");
- Feedback instruments (e.g. postage–paid, mail–in surveys) to solicit input and evaluation from those who use the curriculum;
- Free "Demonstration Packets" which contain one lesson with visual aids, and a supply of order forms; these packets could be mailed upon request, and a toll-free number provided to make such requests easier;
- and so on.

The Friday Nite Live Program has developed a very strong package. Not only is the graphic design excellent, the logo has helped to build identity. Research has supported the program's claims of effectiveness, and the equipment used to make audio–visual presentations is top–notch. In addition, the program offers a variety of ways for youth and schools to become involved, easing access to the program.

You can see how a strategic approach to packaging a single product will increase it's attractiveness and the likelihood that it will be widely received and implemented. It is important to point out, however, that there are some points listed in the example above which are so important that failure to achieve any one of them practically guarantees failure of the whole enterprise. And that's why you cannot afford *not* to carefully consider your packaging strategies.

19
Use Research To Build Credibility

The most fundamental component of your marketing strategy should be *program effectiveness*. If you say you are going to prevent drug abuse, your actions should in fact contribute to this goal. But let's face it: as a profession, we don't have much of a track record. As one prominent prevention consultant delights in reminding us, "Prevention specialists are experts at failure."

Well, that's changing. A plethora of new research is emerging which is guiding the field by demonstrating what works, and what doesn't. A difficulty is that the credibility of many of the traditional, "common sense" prevention approaches is not surviving the scrutiny of research. For example, prevention programs that rely solely on school-based "drug education" curricula generally have no significant impact on drug use related behavior. Often these are the programs which are most appealing to those who lack prevention sophistication.

Three suggestions:

1) Regularly *review the research*. Make sure you and your staff are up-to-date. There are publications which summarize research and make this easier—the *Prevention Pipeline* published by the Office of Substance Abuse Prevention is an excellent and affordable example. You might assign an individual staff member to be your "resident scholar" and allocate a portion of time to reviewing research and reporting findings at staff meetings. Conferences can also be excellent sources of information.

2. Plan your programs accordingly. This is common sense, but it can take substantial courage to do so. Strategies which work tend to be more complex to implement, and to require greater commitment of time, money, and other resources. Because of this, the task of convincing clients and fundors to use them can be formidable. This task is even more intimidating when part of your message is that the programs in which they already have a great deal of investment are of questionable value. Yet it is our professional and ethical obligation to provide true leadership in prevention. And that means giving up the occasional sacred cow. Be guided by the conviction that, in the increasingly competitive

prevention market, those who are guided by research will in the long run prevail over those who aren't.

3. Incorporate prevention research findings into your marketing materials and sales presentations. This enhances your credibility and helps guide the decisions of those who your programs benefit.

20

Train and Evaluate Staff

Well–run organizations have products that are in many ways similar. Your program may be providing a school–based prevention program, and will therefore be in direct competition with other competent and capable concerns that offer competing products. In this case, the winning factor is often the people.

It is the *people* in your organization who provide the details that add up to create your image. So naturally it is important to pay very close attention to your recruiting and hiring process to make sure that you get good people.

However, simply having a good hiring process is not enough. You must also build some *quality control* into this very important part of marketing. That's why marketing pros insist on *effective employee evaluations*. These evaluations must be based on clear performance objectives, and must be conducted on a regular basis.

There was once a program in my area that offered excellent services. When their prevention specialist left, they hired a replacement who was very personable and seemed quite competent. The trouble was, he never delivered what he said he would. Clients all over the county were getting burned by his empty promises and half–finished products. The supervisor saw that some effort was being made, but she never set any concrete performance criteria, and since the employee was so personable she found it difficult to mount any real pressure to change his performance standards. Predictably, clients eventually started looking elsewhere for services.

21

Integrate Evaluation Into Your Program

A vital element of marketing is the continual gathering of information to assist with making marketing decisions. One important arena of data is evaluation of your program effectiveness. You should include in your marketing and management plans an effective strategy for program evaluation.

There are many resources which describe the "how–to" of program evaluation (see bibliography). Once you have gathered and analyzed evaluation data, you must decide how to use it. Naturally, you will seek ways in which your programs and services can be improved.

For marketing purposes, program evaluations present some unique public relations opportunities:

- You can mail an evaluation report to your client mailing list, highlighting the positive findings;
- You can frame negative findings as "opportunities for continued program development," this strategy turns potential liabilities into marketing assets.
- Local media are likely to be interested in some of your evaluation findings. Prepare a media release to share them.

TIP: A meaningful evaluation can be very time–consuming, and therefore expensive if you are using paid staff time to conduct it. Check with a nearby community college or university to see if you can locate a student who would be interested in conducting your evaluation as a Senior Project or a Masters Thesis.

22

Create Aesthetically Pleasing Products

The *aesthetics* of your products are what create the subliminal impressions which guide the purchasing decisions of many of your clients. Steve Jobs, who led the team which created the Macintosh computer, spent many hours studying the designs of luxury cars and other high-ticket consumer items. He was dedicated to the idea that a product should not just be easy to use, but should be designed to *give the user the pleasure of the art connoisseur.*

If you can apply this idea to your services and products, they will practically sell themselves. Consider the "look and feel" of a Friday Night Live show. It's not just a powerful and effective message; with its powerful visuals and moving soundtrack audience members enjoy it aesthetically as well as intellectually. How many other prevention programs can make the same claim?

Because of this, the many details which go into the composition of your whole product should be carefully selected so that they are complementary, visually appealing, and ergonomically useful.

The art and science of typography offers many useful lessons in this regard. Typographers are driven by the goal of creating a printed sheet which will maximize the chances of capturing and sustaining the attention of a reader. Of course, good copy is needed to achieve this. But even the best copy can be rendered unreadable if it is poorly set. So typographers have learned how to control the most minute details of the printed page. You can learn from them.

When production of the *California Prevention Network Journal* began, the editor spent many hours studying the craft of typography, page layout, and basic graphic design principles. He then applied what he had learned to the design of the journal. He knew that my investment of time had paid off when he received a call from a colleague, a substance abuse librarian who is inundated daily with materials relating to substance abuse prevention. She told him that she picked up a copy of the journal with the intention of skimming it rapidly. However, she ended up reading it cover to cover. This was a tribute not just to the quality of the articles the *CPN Journal* contained, but also to the details of design which were completely subliminal to the reader. The unifying factor in these design elements: quite simply, aesthetics.

23

Be The Real Thing

Be who you really are. Everybody is tempted at times to put on act to try to impress someone else. But in program promotion that is a deadly mistake. People will see right through you, and will learn *not to trust* you.

Some of the marketing ideas in this manual may seem contrived to you; perhaps these are the ideas that do not "fit" who you are. However they may be opportunities for you to broaden your skills. Smiling does not come naturally to me. When I sat before a photographer for a recent portrait, the photographer required that I smile into the camera lens, and that felt very forced and ungenuine. But as I practiced, the smile began to come more easily and naturally.

What is not genuine today can be tomorrow if we intentionally seek to broaden our skills and enhance our personal resources.

Section D: Pricing Tactics

24

Keep Records of Expenses and Activities

It is common in counseling programs to maintain client charts which detail a treatment plan and progress made by the client towards goals. This excellent system can be adopted by prevention programs. You can make a file for each client, and organize a filing system which all prevention staff can have access to. Among the many items this file could include:

- Records of sales contacts;

- Copies of correspondence;
- Memos of telephone conversations;
- Copies of contracts for services;
- Intelligence, such as documents describing the client organization (brochures, annual reports, etc.).
- A "Personal Profile" form which contains information on key decision makers, such as resumes (ask for them) and notes on birthdays, children, hobbies, etc. This include pet projects, pet peeves, and notes on language to use when working with them. For example, in our area some people insist on using the terms, "alcohol and other drugs; program participants; primary prevention." Others respond only to the terms, "substance abuse, clients (or patients); health promotion." Choice of terms is frequently made for political or philosophical reasons; when this is the case, you would do well to respect the choices which have been made.
- Names of receptionists and others who control access to decision makers.

Develop your own system, be creative, and keep it clean and ethical (e.g. do not include information about individuals that you think they would prefer to remain confidential—apply the golden rule!). You will find that your staff feel better prepared, that details are more coherently and accurately remembered, and that your services to your clients become better organized and therefore more effective.

25
Know Exact Costs for Each Service

We have found it very helpful for our marketing strategies to know exactly *where our resources are being used,* and what the *costs* are *for each type of use.*

One procedure for tracking this information is based on a daily time study completed by each staff. The staff person completes a simple form which indicates how many quarter hours are spent on what kind of activity, and under what contract. The form is fashioned so that the data from it can be easily entered into a computer spreadsheet. This spreadsheet is formatted to provide a monthly summary of time allocation and client billings.

The benefits: when you know what your costs are, you can be sure that the fees we charge are within a reasonable range. And you can spot those programs and services which don't pull their weight by producing a reasonable amount of revenue compared to the expense of providing them. This doesn't mean you must automatically abandon those programs, but it does help you to evaluate exactly how they fit within your mission statement, program goals and the scope of services which you provide.

26

Encourage Client Investment: Charge A Fee

Prevention veterans remember the old days when prevention was almost entirely school-focussed, yet we practically had to beg and pass a loyalty test before we would be allowed on a school campus. We were perplexed when we saw the very same schools hiring consultants who charged substantial sums for similar services (although related to different, "safer" subjects).

An important principle was being overlooked: people in our culture tend to *value more* that which we must *invest in;* that which comes for free is seen as of little worth. And the more we spend, the more we value the product. A corollary is *the more you charge, the more valuable your product will appear.* This is so important that one top consultant claims that pricing is the *most important* single act of a change agent.

In the 1980's many prevention agencies began to charge fees for services. Those that did immediately discovered many benefits, only a few of which are listed here.

- Increases in program revenues;
- Enhanced client commitment to prevention projects;
- Enhanced sense of client ownership for program management and effectiveness;
- Simplified transfer of project management from agency to client;
- Improved staff moral and commitment to professionalism;
- And, surprisingly, much greater access to clients.

A caveat: When you charge a fee, the client expects quality and professionalism. Deliver it. You will only sell an inferior product one time.

27
Pricing—A Key Strategic Marketing Act

Setting a specific price for your product is difficult. It is also one of the most important marketing actions you will ever take. For this reason, it must be done *thoughtfully* and *strategically*. There are many factors to take into account, and you must have a clear marketing strategy to guide your decision if you are to be effective.

Among the most important of these factors are:

- What segment of your market is the specific product geared to?
- What do similar products cost?
- What amount of funding is available to those who will make the decisions about purchasing your product?

- Is what you are selling intended to be a one-time purchase, or is it intended to be purchased as part of a package of continuing services and products?

- Must your product pay it's own way, or do you have other funding which subsidizes it?

Charging a premium price is not necessarily a problem. It can help to build a perception of quality. It can also help to maintain standards. For example, the audio visual equipment used for Friday Night Live presentations costs local chapters in excess of $10,000. The program's promoters provide the specifications, so there is no scrimping on this item. This built-in pricing factor helps to guarantee the program's success, as it results in uniformly quality presentations. Kids like their rock and roll loud, and Friday Night Live can deliver the volume.

TIP: Most products sell better if the price is slightly odd—for instance, $105.60 instead of $100.00. This includes set fees for seminars, consulting services, and other curriculums and other common products of prevention programs. The same principle applies to negotiable fees. Say you are negotiating with a school to provide one day per week of prevention consultation for a 35-week period. Your goal is for the school to reimburse you at least $150 per day. Rather than beginning negotiations with a nice round figure like $200, begin with $207. You will fare better in most cases, and may come away with a better agreement than you had hoped for, provided your negotiating skills are effective.

28
Renegotiate Contracts

Timing is of critical concern when renegotiating or extending a contract. Here are some proven tips:

- Renegotiate when your client is happiest—not when the contract is due to expire. This may be very early in the life of the contract.

- Do a "mood check" prior to introducing the subject of renegotiation. If you have reason to believe that your client is under stress or unhappy, be patient and postpone and reschedule the discussion.

- Take advantage of failures or poor work by your competitors by approaching your client when they are most disappointed, and thus more likely to consider changing providers.

- Choose your place carefully when you are closing a deal. The worst place is your client's office; a better place is in a coffee shop or during a lunch engagement.

- Do not require a written agreement at the time you negotiate the contract. Some details will remain fuzzy; that is natural. However, you can seize the initiative by following up with a letter in which you detail your understanding of the agreement you reached. While this leaves the door open for further negotiation, chances are the final deal will substantially follow the details as you set them forth in your letter.

- When a key contact within a client agency is leaving that agency, try to extend your contract before the contacts departure. Also, ascertain whether your contact will provide you with new marketing opportunities in his or her next job.

- When a client agency hires a new executive, approach him or her about a new contract, or extending an existing one. New executives are often anxious to assert themselves and make a mark, and may be particularly receptive, especially if their reference checks on your organization confirm your excellent reputation.

29

Accept Credit Cards

Make it as easy as possible for your clients to purchase your services. If you provide workshops or seminars, or if you sell educational materials, you will increase your clientele by allowing them to pay by credit card. This strategy requires fairly significant volume before it becomes cost–effective. Contact your bank to learn how to get started. An additional tip: if you design *simple registration forms* and provide a *postage–paid* envelope or card, you will increase your clientele even more.

30

Accept Barter

When negotiating a contract, remember that cash revenue is only a part of the equation. Do not miss out on other opportunities for your program to improve it's resources.

For example, a contract with a school district could include many kinds of non-cash payoffs to your agency. You could ask for them to allow your staff to attend district in-service trainings. A local district in our area has repeatedly covered costs for our staff to attend multi–day prevention conferences in distant cities. A district may be able to supply office services, such as reproductions and typing pools. You may be able to obtain surplus furniture (graciously decline if they are offering junk!) or office space. For one of our publications, we realized that our client could not afford to increase the amount they were paying for our services. What they could provide, however, was advertising space. We renegotiated so our fee included three columns of advertising in each issue.

This approach allows a client to spread the cost of contracting with your program across several line items. It also helps to build deeper partnerships than a purely cash contract would.

31

Know When to Cut Your Losses

Sometimes an idea just doesn't work. For example many prevention professionals have attempted to capitalize on research findings which show how effective parenting can prevent substance abuse. Many a parenting workshop has been planned, prepared, and promoted, only to die a spectacular death.

Why?

Perhaps it is because it is very difficult to get any but the best parents to attend parenting workshops—and they are not the target group. Yet many of these agencies keep trying, perhaps because a few have succeeded and the others hope to capture the successful formula which the few apparently applied. However, it is important to remember: there are many strategies which can be used, and if your staff are spinning their wheels with little positive outcome it may be time to cut your losses and walk away from failure. By financial criteria it makes sense to do so. By marketing criteria it more than makes sense—the last thing you want the public to do is to perceive you as a failure.

Are your present programs working, or not? If they are not, you need to make a judgement call. They may simply need better marketing, in which case just one or two of the ideas in this manual might make the critical difference. Or they may be dead horses, and all that you will accomplish by beating them is to stir up the flies.

32

Know When To Resign A Contract

There are several situations in which resigning contracts can benefit your overall marketing posture. It is important to know *when* to resign a contract, and how to *resign* a contract. Equally important is the *will to do so.*

When to resign a contract:

1. The best time is *before entering into an agreement.* If you know that all of your resources are already

committed, and that the new contract will not provide you with the necessary funds to purchase new resources, then "just say no." This is also important if the services required are outside of your area of expertise, making it difficult for you to meet your own quality standards.

2. When completion of the contract demands behaving in a way that conflicts with your ethics, or contradicts your vision of the purpose of your program. Continuing in these situations sends mixed messages to your clients at best, and at worst can seriously compromise your best resource—your reputation.

3. When you find that you are overcommitted, and that there is no possible way to either renegotiate the contract or to deliver on your promises.

How to resign a contract:

1. First, try to renegotiate; you may be able to come to a new agreement which is more favorable to you.

2. If renegotiation is not possible, resign promptly and in writing. Of course, it is important that any written contract you enter into contain an escape clause which allows you to do so.

33

Diversify Your Services And Income Sources

Many agencies start with a single contract or funding source. If you are in this position, it will benefit you to develop new funding sources. By doing so, you avoid becoming dependent, giving a single funding source the power to make or break your agency. The cost of this dependency is loss of freedom—freedom to criticize, to experiment, to try new ideas, to be creative, and to be cantankerous. Effective prevention requires all of these at times. When you have a single funding source you constantly risk becoming a fawning, subservient entity.

34
Budget for Marketing Activities

This idea is so basic, so fundamental, and so essential, that it bears repeating. *If you are serious about marketing, you must support your marketing efforts with a budget.*

It is not necessary to budget a huge amount of money; as Jay Conrad Levinson points out in *Guerilla Marketing Attack*, "Others can outspend you in every arena of marketing that money can buy. But they can't outspend you in marketing arenas that money can't buy. They can't always out-think you. If you can put up the time, the energy, and the imagination, you can gain the same marketing leverage that others get by putting up megabucks."[1]

That's an important concept to remember and to apply. But do not be fooled into thinking that this means you can get by with no budget. Use the annual marketing plan form in this manual to help you build a budget to support your plan. Research every single cost item—usually it only takes a phone call—and then manage your marketing campaign so that you stay within budget. But *have a budget!*

How much is reasonable? Five percent of your total program budget is minimum. Ten percent is better. A really aggressive amount would be 15% or higher. You will have to create a budget which fits your situation, your mission, your program goals, and your marketing campaign.

35
Establish A Foundation to Build Assets

Your agency can benefit by establishing a separate foundation. The Turning Point Foundation, established by Turning Point

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1: Levinson, Jay Conrad: *Guerilla Marketing Attack*. Houghton Mifflin Company, Boston, 1989.

of Central California, Inc., was established for the sole purpose of supporting Turning Point programs.

Here's how it works: first, most cash donations go to the foundation, rather than any one of the agency's 19 programs. Second, whenever a program needs expensive equipment (which most funding contracts won't allow) the foundation purchases it and leases it to the program. This way the money spent on leases strengthens the agency by building an inventory of equipment, which, when paid off, can continue to be leased to programs, thus building cash assets. Third, when a program needs to purchase a facility or property the agency can acquire it through the foundation. This way the agency builds its real assets, instead of building the assets of landlords.

Be sure to work closely with an attorney who is knowledgeable about non-profit corporations and charitable foundations when you establish your foundation. It will take some time for the assets of your foundation to build to a significant amount, but once they do the increased access to resources will benefit not only your marketing efforts, but the financial security of your agency as a whole.

Section E: Distribution Tactics

36

Coordinate Planning With Other Agencies

No agency can do everything. If we are to be effective we must learn to plan our services so that they fit into a bigger picture. And that bigger picture includes other prevention agencies, including those with whom you are in direct competition for funding and other resources.

Yet competitors can simultaneously be *collaborators.* Often turf issues can be settled through a series of meetings, and as a result agencies can define how the services of each *complement and strengthen* the services of others. Once that has been settled, you may be able to collaborate on promotional materials. For example, most areas have an agency which produces a directory of programs, services, and access information. This concept can be expanded to include brochures, awareness campaigns such as billboards, and even telephone listings and yellow page ads. Success requires mutual respect, the ability to negotiate, and a real commitment to "the big picture."

In California, the coordination of resources at the state level has resulted in the Department of Alcohol and Drug Programs, the Department of Education, and The Attorney General's Crime Prevention Office working together to have a positive influence on school-based prevention programs.

37
Offer Solutions, Not Prevention

It is axiomatic among marketing professionals that prevention is almost impossible to sell to Americans—we want *solutions.* So when you are promoting your services, think in terms of how your client benefits—that is, ***what problems your services solve*** for your client.

Often you can find research which provides lists of concrete benefits. For example, the TRIBES program promoted by The Center for Human Development is a very powerful drug abuse prevention strategy. But it is not promoted to prospective school staff merely as drug prevention. Instead the benefits of the program are clearly listed: improved academic achievement, decreased classroom discipline problems, and so on. In a similar manner, student assistance programs could be promoted on the basis of increased average daily attendance (which translates, in school administrator language, as "more operating money"), and lower drop-out rates.

Suggestion: As part of the overall development of your marketing plan, you should certainly make comprehensive lists of how your clients benefit from each of your services. Do this in a brainstorming session with staff—and with a few clients. At the end of this session you will have some excellent lists to include in your promotional materials.

38

Be Patient

Be willing to take the long view. A marketing campaign can take months or even years to achieve the goals that set it in motion. In fact, some of the best–designed campaigns are built to be run for up to 10 years.

Many of the goals of marketing drug abuse prevention are long-term goals by nature. Gaining access to target populations; developing community networks and coalitions; identifying and reducing environmental risks; changing public policies; reducing problems related to alcohol and other drugs...there are no immediate miracles. Be willing to quietly, consistently, and persistently campaign to gain that blue ribbon contract, or to win funding for a special project. Remember the story of Richard Bach: 52 publishers refused the manuscript of Jonathan Livingston Seagull. It was because of Bach's patience and commitment to marketing his product that the manuscript eventually became a phenomenal best-seller that has touched the lives of millions of people.

39

Begin A Mail Order Business

People love to shop by mail; that's why so many mail–order businesses are thriving. If you have built a good mailing list of your clients you may be able to establish a mail–order business. Not only may you increase your revenues, but you will simultaneously be providing an important educational service—access to up–to–date information.

There are several excellent publications which can guide you through the process of establishing a mail-order business (see appendix). Because most community-based agencies are non-profit, you will want to seek advice from your attorney on how to handle your "profits" and related details, such as taxes.

We tested this idea by buying small quantities of books from a popular mail order house. Because we purchased quantities, we received a 15% discount. We then created a one page "catalogue" which listed our offerings and provided an order form. This catalogue was mailed to 400 names on our list. The result: within four weeks we were sold out of some titles, while others sold only a few copies.

We learned several things from this experience:

1) It is important to allocate significant staff time to managing a mail order business. When orders come in, they must be filled, and that means someone has to be available to work on them.

2) People *will* buy, and a huge mailing list, fancy catalogue, and so on are not necessarily requirements for success;

3) Inventory management is a key to successful mail order—overstocking items which don't sell is a costly mistake.

40

Offer A Grant Writing Service

If you have a talented grant writer on staff, here is a marketing idea which can give your program a tremendous boost. Write grant proposals on behalf of school districts and other community based organizations that lack the capability to respond themselves. Offer this as a free public service; you can do this if you negotiate including this service under your contract objectives with your present funding sources. After all, writing successful grant proposals can help build effective programs and healthier communties.

The grant writer has a tremendous amount of influence over program design, and that means that you can influence other institutions to adopt state-of-the-art strategies, and to build programs which include effective linkages with the services your agency offers. In addition, you will find that each proposal you write offers opportunities to include subcontracts back to your agency. For example, if you were to write a proposal for peer helping programs on behalf of a school district, the proposal could include a line item for consultants to help develop the program. You and your staff would, of course, be happy to provide the consulting services.

At Turning Point Youth Services, we brought over $1 million worth of new prevention programs into the county over a three year period, and enjoyed over $250,000 of subcontracts along the way. We also developed a reputation for consulting effectiveness, and have become firmly positioned in our market area as an important resource for prevention program development.

41

Deliver On Promises

Deliver on promises. If you make a commitment to provide a certain service or product by a certain date, do it. If you have to spend nights at work, and pull a couple of 80-hour weeks, so be it. Nothing breeds success like success; on the other hand, failure can build a reputation which breeds more failure.

All of your marketing efforts will be worthless if the programs which they support and promote cannot deliver the goods when the time comes. It is true that you can sell an empty promise—once. But if you want to build a program with *lasting presence* and *maximum impact*, you must *do what you say.*

Section F: Advertising Tactics

42

Pay For Excellent Design

The appearance of your letterhead, business cards, brochures, advertisements and presentation materials (slides, transparencies, etc.) communicates a powerful message about your professionalism. That is why *high–quality graphic design* should be an important element of your marketing plan.

You may have someone on staff who is a talented designer; in that case, it is worth considering allocating enough time, tools, and training to use that asset effectively. However, most agencies use the services of a graphic design firm. When you have a marketing plan completed, call your designer and make an appointment to review your design needs. Be prepared to detail what your mission is, who your target audiences and beneficiaries are and how you want your publications to affect them. Be very clear that you are asking for a design which will help you to meet your marketing goals.

Ask for help on getting all of your publications to *work together,* through consistent use of design elements, theme statements, and color. If you do not presently have a good working relationship with a designer, look around at the promotional pieces that other local agencies produce. When you see something that you like, find out who designed it, and arrange a meeting. You will soon benefit from an important boost to your overall marketing campaign.

It is helpful to create a design that will appeal to your specific audience. When Friday Night Live staff were developing their design themes, they spent some time browsing in a local record store. They noticed which albums kids were buying, and realized that these kids (this applies to adults also) were in a habit of responding to certain types of graphics. Now, if you carry a Friday Night Live card entitling you discounts from local merchants, the typeface on the

TIP: A strategy for saving money is to hire an excellent (and therefore probably expensive) graphic designer to do your initial creative design, and then work with a less expensive shop for your ongoing production needs. Tell the less expensive designer to use the themes that were established by the more expensive firm.

43

Pay Attention To Detail In Business Letters

Business letters written by you and by your staff are evaluated on far more than their content. Do they look neat? Is the format an accepted business format? Are there typographical errors and misspelled words? Is the writing style clear, concise, and grammatically correct?

These "little things" may make a much greater impression than what your letter actually says. And it is the impression made by them that will be lasting. This is why the business letter can accidentally become a major liability. You could be doing everything right, and then send a sloppy letter to a prospective client, who then sends you back to square one.

Some suggestions:

1. Brief your staff on letter writing, and brainstorm reasons why format, spelling, and grammar are important.

2. A program manager (or marketing director) can personally screen all outgoing correspondence (or a random, limited sample). When there are problems use the opportunity for coaching the individual. After a period of screening correspondence, give recognition to competent staff by allowing them to send letters without previous screening. Monitor quality by requesting copies of all correspondence.

3. Type up a *sample letter* which *models a consistent format* for all correspondence from your office. It

should describe and visually demonstrate margins, indentation, typeface and size, and other details.

4. Send staff whose work relies heavily on writing to workshops on business writing.

44

Mini–Brochure Business Cards & Other Tips

Your business card can be an extremely flexible, inexpensive, and effective marketing tool, if you know how to use it to it's full advantage. Here are a few tips:

- As a miniature brochure: simply list the services you offer on your card. Some organizations resort to a double-sized, folding card to accomplish this, but with good design and a measure of austerity it is not necessary to do so. You can also put a brief mission statement on your card.

- Clip your card to your correspondence. That way people will place it in their card files, and you will therefore be more accessible to them.

- Suggest a response on your card, such as calling a telephone number to receive a complimentary copy of a brochure or a sample of a product.

- Many companies produce business cards in Rolodex form.

- Have your cards prominently displayed in your reception area.

- Always take plenty of cards to business meetings and conferences. Don't wait for someone to ask you for your card—take the intiative to hand them one as you are being introduced.

- When someone else gives you their card, find a convenient moment to jot a few notes on the back of it to help you remember what you learned about that individual.

- Accept the extra expense of printing your card in two colors; this alone will help you to stand out from the crowd.

45

Be Smart With Classified Advertising

Whenever you run a classified ad, use it as an opportunity to strengthen the image of your program in the community. Classifieds, especially "Help Wanted," are read by thousands of people every day, including some of your clients. Take advantage of this fact.

For example, when you are recruiting staff you could run the standard boring ad, which reads:

> "Counselor. MA Pref. Works in Schools, Knowledge of Drug Prevention Req. Resume to ABC Prog. EOE."

Or, you can run an ad which shows your marketing savvy:

> "Opportunity to join award-winning team of prevention professionals creating state-of-the art programs in area schools. Competitive salary, creative working environment. Send resume and cover letter to: ABC Programs. Our mission: drug-free communities. EOE."

It is true that the second ad costs significantly more. But is it worth it? That's a call that you have to make. Consider this: the second ad affects not just public perception of your agency, but also the attitudes of prospective staff. You will hire someone who knows it is a privilege to work with your organization, and this will positively affect the *esprit de corps* of all of your staff. And that *esprit* can be tremendously infectious and can carry a lot of marketing mileage.

46

Use The Yellow Pages

If your competition is in the yellow pages, you should be there also. The larger your ad, the better. The yellow pages are expensive, but they present yet another opportunity to let prospective clients know who you are and what you provide. A good ad can include your mission statement, a listing of your services, a line about credibility ("serving Smith County for 12 years") and provide contact information (address, phone number, office hours). If you have a logo, display it in your ad.

For an additional fee you can have a second color (usually red) included in your ad, and this will dramatically increase readership and response to your ad.

One of the few free services offered by the telephone company is assistance with designing yellow pages ads; consider taking advantage of this service.

Idea: Because of the expense of yellow pages ads, you may wish to consider collaborating with other agencies and running a joint ad together. If you do so, design your ad carefully and test it on several people to be sure that it does not create confusion.

47

Always Include Response Devices

Make sure every promotional piece that you produce, from newsletters to brochures to annual reports, contains a *response device.* Also known as a "call to action" the response device consists of a coupon to mail in, a toll free number to call, or some other task to get readers involved with your agency and on your mailing and marketing lists.

For example, a curriculum or an annual report could contain a postage–paid card providing an opportunity to give you feedback on how effective the piece was. This helps you to build the quality of your mail list by adding the names of individuals who you know have enough interest to respond—in other words, good prospects.

TIP: Any time you create a flyer to promote a workshop or seminar, you probably already include a registration form. To increase the usefulness of your registration form, add a space where a person can indicate that they are *not* interested in attending the workshop, but would like to be placed on your mailing list to be informed of future events.

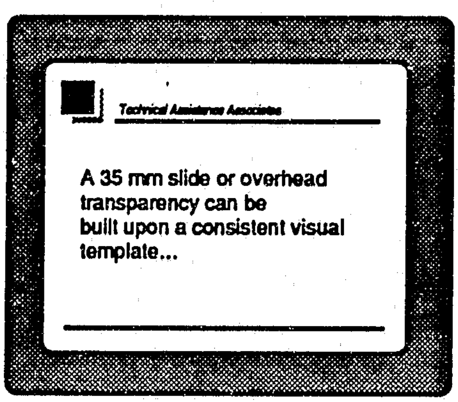
48

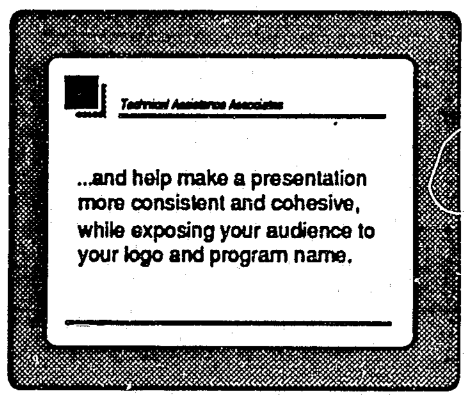
Advertise with Visual Aids

The visual aids you use when planning a workshop are critically important in two ways. First, effective visual aids greatly enhance the amount of information that your audience retains. Second, and of great importance for program marketing, the way your visual aids are *designed* and *presented* communicates subliminal, but powerful messages about your competence and professionalism. Poorly designed or implemented visuals can backfire and cause significant damage to your credibility.

The principle types of visuals are charts, transparencies used with overhead projectors, and slides. Each has a particular strength. However, rapid changes in technology are creating a climate where transparencies and slides are favored. TRANSPARENCIES work best with smaller audiences who can sit fairly close to the screen upon which they will be projected. SLIDES are great for large audiences. Either must be well produced and the text and graphics on them should be of high resolution, or they will look out-of-focus when projected to cover a large screen area. Service Bureaus will help you produce excellent slides at a cost ranging from $2.00 to $15.00 and up each. Transparencies are considerably less expensive.

In any workshop we do, we prefer to use visual aids which have a common design theme, featuring our program logo:





49
Exhibit At Conferences

Whenever there is a health promotion event or conference which is heavily attended by your clients and prospects, your program should be represented. You can have an effective presence by simply having staff attend, mingle, and pass out business cards and promotional materials.

In many cases having a booth is an excellent idea. Booths are especially appropriate if you have a product or service which can be purchased at the booth, such as a membership, subscription, or educational materials. An audiovisual presentation orienting viewers to the purpose and services of your agency can be displayed at your booth. Your presentation should be very brief however, since conference participants do not generally visit a booth for more than a couple of minutes.

Perhaps the most effective use of a booth is for networking. Your staff should introduce themselves to visitors, and be able to give a brief, succinct summary of what your program does. Exchange business cards with all of your visitors; it can be helpful to attach these cards to 3 x 5 cards and make notes to help remember pertinent facts about each individual. But the most potent tools are a warm, sociable smile and genuine friendliness.

TIP: Have a gift drawing sponsored by your program. If you announce the drawing at the beginning of the conference, you will increase the traffic at your booth. To enter the drawing, have participants drop their business card in a fishbowl, or fill out a small form. Then hold the actual drawing at the end of the conference, so you can announce a winner to participants before they leave. This will help to build your mailing list (remember to keep all of those cards in the fishbowl!) and will create pleasant associations with your program name. If your gift is carefully chosen it can even promote a specific prevention strategy (example: your gift could be a library of 5 books about student assistance programs or delinquency prevention).

TIP: Do you think that booths are too expensive? Not necessarily so! Some conference promoters rent booths space for only $50 or $100 more than the price of a registration—*and include full registration for one in the booth rental price.* If it's a conference you wanted to attend anyway, this can make booth rental a very practical and cost–effective proposition.

50

Use Grocery Store Bulletin Board Advertising

Supermarkets, delicatessens, churches, and other neighborhood gathering places often have bulletin boards where you can place a 3 x 5 card which advertises program activities. These bulletin boards increase confidence in your program by positioning you as a member of the community. The tiny signs which you post can be used in a variety of ways. They can simply introduce your program, or they can focus in on a very specific topic, such as advertising a community gathering to be held at certain time, place, and on a certain topic. Be creative.

This approach can be especially useful if you are facilitating a community organization process which is intensively focussed on a specific neighborhood.

Most bulletin boards are time–limited, so you must remember to keep your cards updated. Remember that consistency and long–term exposure will build confidence, and take advantage of this by promptly replacing your cards each time they expire.

Flyers posted on storefronts can serve similar purposes, but are more suited to one–time special events which involve entertainment of some sort.

51

Use Advertising Specialties

Advertising specialties, like T–Shirts, coffee mugs with your logo or program name, etc., serve to *remind* people of your availability. It is difficult to use them to explain the purpose of your program, or sell clients on a particular service that you offer. But they build confidence through the principle of repetitive exposure to your program name.

Suggestion: When you are hosting a conference, create a conference T–Shirt; build the expense of doing so into your registration fee, then give a "free" T–shirt to each participant. This will encourage more people to register. It will provide a lasting tactile and material memory "bridge," linking participants to the conference for a year or more after it ends; and each time one is worn it will serve as a walking billboard for your program. We suggest that you hire a good designer for this project, as effective T–Shirt design is an art form that benefits from some experience. Figure the designer fees into what you charge for your T–Shirts.

When we host our annual *Central Valley Peer Helpers Conference* we have a few extra T–Shirts made to give to advisory board members, school personnel, and other key clients.

As for other advertising specialties, we prefer the coffee mug over most other alternatives. A coffee mug lasts for years, is used frequently, and can include your phone number, making a call from a prospect that much more likely. An advantage of some of the more consumable specialities, such as pencils and pens with your organization name, is that they can be included with your correspondence (and workshop handouts) as a way of making the contact with the client last beyond the time the letter is filed.

52

Use Repetition: Commit To Your Campaign

This is a brief description, but it is important, so give it careful consideration. When you create a promotional flyer, brochure, or other device, remember to *give it plenty of time* to work for you. Repetition is the key to success. Researchers have found that when a person sees a message nine times, he or she unconsciously begins to believe the message. But a person really sees a message in only one out of three exposures. Therefore, you should plan promotional campaigns that expose people to your message at least 27 times.

53

Put The 80/20 Rule To Work For You

The 80/20 rule is the principle that 80% of your services are provided to only 20% of your clients. Why? Because these clients are the core of your customers, and as such have generated as much revenue, contacts, and success for your agency than the other 80% of your clients. Because of this, they are extremely important accounts and should be treated as such.

Here are some steps which you can take to keep these valuable clients satisfied:

- Identify who your 20% are, and list their names; if you are listing agencies, include also the names of the principal contacts who influence that agency to purchase your services.

- Analyze your marketing contacts. What portion of these contacts are with your principle clients?

- Create a calendar of personal contacts. Include all kinds of contact—telephone, letter, business meeting, and social or quasi–business meeting. Balance this calendar so you are giving your key clients the attention they deserve.

54

Make Multiple Uses Of Your Marketing Materials

With the limited marketing budgets of community–based programs, it pays to think in terms of multiple uses. Each promotional item you create has the potential to be used in several different settings. If it doesn't, you should reconsider whether it is worth your investment.

For example, a newsletter can be used far beyond it's initial distribution to your mailing list. It can be included in promotional packages, copies can be left in reception areas of your offices or even of your client's offices, and it can be distributed at public meetings of groups which your agency seeks to influence. Planning for multiple uses will affect the content of your newsletter, and of most other promotional materials you create. You will want to create extra copies, and thus benefit from the economies of scale that accompany bulk printing.

Remember to think ahead, and to examine every promotional item with an eye on the future of your program and the other eye on your clients and prospects.

55

Advertise With Your Answering Machine

If you don't have an answering machine to take your calls during off hours, either get one or subscribe to an answering service. We prefer an answering machine, and here's why: You can control your message better. And in that fact lies yet another marketing opportunity.

There is no reason to restrict your message to the standard, "Sorry, leave a message, we'll call." You can dress it up quite a bit. For example: "You have reached prevention programs incorporated, bringing state-of the art drug abuse prevention programs to the entire Smith county region. Let us know how we can help you; one of our consultants will return your call as soon as we're back in the office."

You can experiment with your message, including short "research bulletins" (Recent surveys show that cocaine by

Smith County high school students has declined by 3% during the last 12 months); program news (In addition to our regular services we are now able to help Smith County schools build effective student assistance programs), and other data. Try changing the message often.

A caveat: some kinds of answering machines frequently malfunction, and outgoing message tapes become mysteriously garbled or fail to "beep." When you turn your machine on at the end of a day, call in on another line and leave a test message to verify that it is working properly. Otherwise, you are sure to eventually end up irritating—and possibly alienating—a client or prospect.

56

Advertise With Your Annual Report

Many non-profit organizations, including drug prevention programs, create an annual report. The annual report can be a simple one-page flyer, or an elaborate booklet with four–color process printing and high–gloss paper. Whatever approach you take, the annual report can be very effective as a marketing tool—if you plan it with marketing in mind.

To get started, begin collecting all the annual reports you can get your hands on. All corporations which sell shares to the public are required by law to produce annual reports, and will generally provide a copy upon request. Many non-profits will also, and these will provide a better quality gauge by which to plan your own report. By looking through the reports of others you will be able to extract ideas and design features that will work for your agency and your marketing goals. You will also learn what data to collect, and this will help to begin a file on ideas and information for your annual report.

Before assembling a draft of your report, decide exactly who you want to see it, how you are going to get it to them, and what information you want your audience to receive. Let these decisions guide your planning. Work with a designer to create an attractive, professional report. The annual report can serve as a marketing tool for an entire year, and can make a very effective attachment to consulting or training proposals, grant proposals, press releases, and other documents.

> TIP: You can save expenses if you design your report so that it can be reused from year to year with relatively minor changes.

Section G: Sales Tactics

57

Know Objections In Advance

There are always at least two good objections to buying your particular service from your particular agency. Know what they are, and be ready to respond to them when a prospect brings them up.

A good approach to this is to ask, "Compared to what?" A student assistance program, compared to a standard drug abuse curriculum, is outrageously expensive in terms of cash, time, and effort. Compared to the costs of hiring a full-time police officer to reduce vandalism and drug abuse, it is relatively inexpensive in terms of cash, student morale, and it's promise for long-term beneficial effects. The key to overcoming the objections of your clients is not to argue with them or to try to prove that they are invalid; it is to change the frame of reference within which they are evaluated, as in the example above. By knowing what your client's objections are likely to be, you can be prepared to acknowledge them and then to present the strengths of your offering in a new frame of reference.

58

Refine Your Pitch

How do you explain the benefits of your program or service to a potential beneficiary? Many successful sales people know exactly how they present their product —they use a script.

We encourage you to have a meeting where your staff brainstorm a script for presenting your programs. Make your script *brief* and *clear*, and write it out in a *conversational style*. It should be as short as it can be, but as long as it must be to make your point. Once you have developed a script, practice it—and keep practicing it until it feels natural. Staff can role-play real-world situations, like interruptions in their presentation, and can discuss how to determine when it is best to stick to the pitch, and best to abandon it.

Sound contrived? Well, it is, but so are manners. And good scripts, like good manners, really work.

The benefits of using a script for your program are many. It promotes consistency of the messages that clients hear, which increases their confidence; increases accuracy of their knowledge about your services; and avoids of miscommunication regarding costs, contracts, and related issues. A good script might include:

- The mission of the program;
- A brief history of the program, or what need led to the development of the services;
- A description of what the services are;
- An explanation of who the services will benefit and how;
- How the client's needs will be met by purchasing the services;
- What the services will cost;
- What the procedure is for purchasing the services.

Be prepared to close the deal immediately, with a verbal agreement and a handshake.

TIP: Mention the features of your offering, and always follow a feature by describing a benefit. For example, you might say, "Student Assistance Programs get help to students early, before their problems get out of control. And that means they do better in school, and are less likely to cut class or to drop out."

59

Tactics for Long-Term Sales

In the prevention field, to make a "sale" often means getting an organization or an individual behind a particular tactic. Frequently this requires many contacts over a period of time ranging from a week to several years.

In some cases, staff turnover may create a situation in which the sale is handled by several people in sequence. This can create a good deal of confusion and mixed messages, not to mention lost opportunities, as succeeding "sales reps" each give their own version of what they are selling—and with prevention programs that can mean a great deal of variation between versions.

You can manage this effectively by *using a script* (see next idea) and by strategically *planning your contacts* with individuals within client organizations. Make a chart; on one side list the individuals who influence the decision to buy into your services. Across the top, leave spaces to list the dates on which they were contacted—or to schedule future dates on which they will be contacted. Use the chart to keep track of all contacts, specifying who made the contact, what the purpose was, and what type of contact it was (e.g. phone, letter, face-to-face). This way you can actually plan out an entire sequence of contacts including which staff member initiates the contact and what the purpose of the contact is.

60

Provide Sales Training To Staff

In the health promotion field, we don't usually think of ourselves as salespeople. Yet much of what we do is in fact sales. We are selling *new ideas* and *new behaviors*. More concretely, we are selling *specific programs and strategies* to *specific individuals.*

Salesmanship is not merely a minor ancillary skill for a health promotion specialist; it is a core technology, the mastery of which could significantly enhance our effectiveness. Yet few prevention specialists have had training in sales techniques. Why not send your staff to a sales training seminar? You can discuss sales techniques at staff meetings, and when you develop a new service one focus for discussing how you are going to promote it should be specific sales strategies. Sales strategies include promotions, pitches, and pricing. Each of these are listed as separate ideas.

61

Maintain a Marketing/Sales Library

You probably have a decent library in your organization, with a number of titles related to social work, drug abuse, delinquency, and so on. You are also likely to subscribe to newsletters and journals which are related to the field of health promotion or drug abuse prevention. How about expanding your library during the next year by adding a marketing section? With regard to the prevention of alcohol problems, your staff will become very enlightened by the alcohol industry journals—particularly in the areas of advertising, promoting, lobbying, and influencing legislation.

We have listed in the appendix those titles which we feel are most helpful to our continuing efforts to become effective program marketers. The emphasis in these is definitely on the "how-to" rather than on theory. If you buy even one, and only browse through it, you will get a couple of good ideas. But if you really *study* several, you will find that you have gained insights and tools which will significantly aid your efforts to improve your marketing and management approaches.

Section H: Promotions

62

Deliver a Series of Strategic Newsletters

A newsletter can be a powerful marketing tool, especially when it is used strategically. Plan a series of newsletters in advance so that they can be used to *develop a theme* and to *reinforce each other*. That way, you get the most impact for your investment.

Carefully choose your subjects so that they speak to a specific target audience. Have in mind *exactly* how you want to influence your target audience. For example, your goal may be to promote student assistance programs in a county where schools have committed all of their resources to other strategies which you know are ineffective. You might plan a series of newsletters which target decision makers in school districts. Articles could include explanations of various components of student assistance programs. A "Research Update" column could summarize research which supports your offering, and could also highlight research which supports your claim that alternate strategies are ineffective.

Remember to provide an opportunity for "donor" subscriptions, even if you intend to mail it for free. You can generate increased revenue this way.

During a master planning process, Tulare County Alcohol and Drug Division staff created a newsletter that was very specifically aimed at decision makers and opinion leaders. They began by asking a few questions about their audience: What would they be interested in? How much time could they reasonably be expected to invest in reading a newsletter? How often would they need to receive a newsletter to maintain a sense of excitement and continuity? What resources are available to devote to creating and mailing a newsletter? In response to these questions, staff developed *Flash!*, a one-page newsletter that was mailed two to three times a month. They provided an attractive binder to each recipient of the newsletter, and placed dividers in the binder to categorize information related to the master plan. Flash was a great success.

The point of this story is that newsletters are a communications tool, and if you publish one, it should communicate. Consider carefully what you want to say, who you want to say it to, and what action you want them to take as a result. Then, if a newsletter still seems like an appropriate strategy, tailor it to your needs, not to tradition.

Resource: *Editing Your Newsletter,* by Mark Beach. Everything you need to know about the technical aspects of designing and producing a newsletter.

63

Offer Free Consultation/Needs Assessment

One of the services your agency might consider offering to schools, businesses and other organizations, is a free needs assessment. This can be especially useful if your present funding sources support needs assessments as a service provided under your contract.

If you offer this service be sure you have a *clearly defined method* for conducting the needs assessment. At a minimum, your approach should include a planning stage, data collection, data analysis, and a written report which includes specific findings or recommendations.

For marketing purposes a needs assessment can accomplish several goals:

1. You will develop a *working relationship with decision makers* in the organization whose needs you are assessing.

2. You will *demonstrate the expertise and skills* of your staff.

3. You will *gain valuable data* which can be used in funding proposals, in promotional presentations, and in education-based prevention strategies.

4. If everything goes well, your client may become convinced that they should contract with your agency to help them build a response to the needs whose existence your assessment has demonstrated. Be careful for conflict of interest issues on this one, however. Your professional reputation, and the confidence that customers have in you, is one of your most valuable assets; don't squander it for the sake of short-term gain.

64
Offer Public Workshops and Seminars

The *expertise of your staff* is the source of your *credibility* and of the *confidence* which your beneficiaries place in your program. Show it off. Providing workshops is a natural way to do so. Your staff can present workshops at conferences hosted by other agencies. Or your staff can organize and present training workshops hosted by your own program.

If you present a workshop specifically for local legislators (for example), you are communicating a powerful message that *you are the expert* to whom they should turn. And when you charge a fee, that message is reinforced. Of course, you also benefit from increased revenue.

Some tips:

- First, be sure your staff are well-trained in presentation skills.

- Make sure that your handouts, visual aids, and promotional materials are professional in appearance and designed so that each piece complements the others.

- One very successful prevention agency in Illinois has a "Workshop Manager" who briefs staff prior to every training, and debriefs the training with them afterwards. This approach can help to maintain high quality.

- Once you start sponsoring workshops, you will probably discover new topics of interest to your target audience, and can plan workshops to meet those needs (hint: ask for suggestions on your workshop evaluation form). In addition, if you are funded by a county contract, you may be able to include your workshops in your annual program service objectives.

65

Plan Public Interviews for Impact

Radio and television interviews present a great marketing opportunity, but there is a second edge to this weapon: they can also highlight your blunders in a very public setting. When you create an opportunity for an interview (or have one given to you) be sure to prepare thoroughly for it.

A good place to start is to read some material which offers advice on how to pull off a great interview; *The Unabashed Self-Promoter's Guide,* by Jeffrey Lant, is a very helpful book for this purpose. A few tips from that book:

1) Have clear goals for what you want to get out of the interview, e.g. becoming better known, publicizing your product or service, enhancing your image, or increasing revenue.

2) Provide the host with a complete set of information about you and your services prior to the interview, and have a copy with you when you go; don't assume that your host will have read your material in advance; be prepared to summarize it prior to the interview.

3) Confirm your date just prior to the interview.

4) Dress in a manner which is congruent with the image you wish to project. This applies not just to television interviews, but also to radio interviews.

5) Lant recommends that you don't drive yourself to the interview—take a taxi or have someone else drive you, so you may arrive relaxed, rested, and ready for the interview.

6) Listen to or view the station in advance, and if possible to the show on which you will be appearing.

7) Brief your host immediately before going on the air. Hand her your card, so she can see your name, and carefully pronounce it for her so she will get it right when she introduces you on the air.

8) Ask for a tape of your presentation, and pick it up immediately after the interview. Review it and look for opportunities to improve on how you present your topic.

66

Focus During Fringe Times

There are many times when natural marketing opportunities spontaneously occur, often as the result of a service you have provided. One of the best examples of these "fringe times" is the 5 or 10 minutes after making an educational presentation or giving a seminar. During this period, the presenter is typically exhausted and looking for an opportunity to escape the crowd. Don't give in to this temptation. There will be a small group of your audience who will seek your attention. Each member of this group is a good prospect, and if you use this opportunity wisely, one or two will become clients.

There are three key steps to remember:

1. *Plan ahead* to remain alert and attentive for at least 15 minutes after a presentation. It can help to have a

colleague standing by to lend you support and to assist you with responding to those who seek you out.

2. *Listen carefully* to what people have to say. Take notes if they ask you a question, and gather business cards from them. In response to questions, let each person know if you can be helpful, and if so, in exactly what way. This is where your opportunities to develop provider relationships are really abundant.

3. Using your notes of the conversations you had in those hectic minutes, *follow up* later with each individual. This can be done by telephone, correspondence, or even an immediate coffee break.

Section I: Publicity Tactics

67

Cultivate Good Press Relations

If, like many other drug prevention programs, you are frustrated by the near-daily deluge of press about the "War on Drugs" while your local efforts are routinely overlooked, it may be time to meet with the press. The ability to pull this off depends on several factors: your local area, the particular media, how credibly you present yourself, and so on.

A successful approach we have used works like this:

1) Team up with another agency or with an official such as your county alcohol and/or drug programs administrator or advisory board chair.

2) Have the person with the highest credibility factor (or the best personal relationship with the editor) contact the managing editor and ask for a meeting. State the purpose of the meeting clearly, honestly, and concisely: "We would like to know how we can work with your newspaper so that the public will better understand our programs," is an example. The

editor may meet with you, but will probably refer you to a reporter. Either way is fine; you now have an opportunity to build a *personal relationship* which can become a productive marketing contact.

3) Be clear, open, honest, and concise at your meeting. Ask questions—it may help if you write them out in advance. Listen carefully to the answers you are given, and take notes to capture what you are told.

4) Follow this meeting up with personal contacts. You should immediately write a letter thanking the editor and the reporter for their time. And be sure to put the information you gathered to practical use within a couple of weeks after the meeting.

68

Develop Press/Public Relations Kit

The press/public relations kit strategy is used by many savvy marketers from the human services. It is considered a fundamental piece of most public relations campaigns. The package is usually contained in a folder or binder with attractive graphics, including the program logo and name, printed on the outside. Inside the package is a collection of materials which are carefully chosen and neatly assembled to promote your services and programs.

These materials can include virtually anything—the limits are your imagination, your judgement, and your budget. The key is to choose each item *strategically*—it should *say something* to a *specific segment* of your market and encourage a *specific action*—such as making a donation or a referral.

Your package will be more successful if it contains one or more items that are *immediately useful* to the recipient, such as a pencil or pen. A partial list of what can go into a promotional package:

- Brochures;

- Business cards, pre-printed rolodex cards;
- Newsletters;
- Surveys or questionnaires, with return envelopes;
- Advertising specialties, such as pencils, key rings, and so on;
- Copies of magazine or newspaper articles about your program or services;
- Photographs of staff, facilities, or activities;
- Fundraising pledge cards or envelopes;
- Testimonials from satisfied clients;
- Bumper sticker or decals with your program theme;
- Posters.

69

Master the Art of the Press Release

There are many more opportunities to write press releases than most programs take advantage of. In some ways, this is probably a good thing; you don't want to wear the press out by "crying wolf." But a well-written press release can result in excellent publicity for your programs.

Here are the basics to remember:

1) Select a newsworthy topic.

2) Select the appropriate media.

3) Write the release—it should be written exactly as you want it to appear as an article, with quotes and other information arranged in a style which is consistent with the style of the particular media you are trying to reach. If you make it very brief, newspaper copy

editors are more likely to use it. They always need small "filler" articles for the odd space. If you make it long, they are more likely to feel that they need to edit it, which means more work, which means less likelihood of acceptance.

4) Neatly type the release on plain white paper, double spaced, and prominently feature the contact person's name, work and home phone numbers, organization, the name of the event, and the day, time, and location on which the event will take place.

5) Send it to a specific reporter who covers the type of event about which you are writing. Timing is crucial; a release sent too far in advance gets thrown away, and one sent too late won't be used. Don't believe the official guidelines which say submit an article four weeks in advance—four days is more like it.

6) Follow–up with a phone call.

70
Maintain Stock Photographs

Photographs can be an extremely effective marketing tool; just reflect on a recent Presidential election and you will realize that the use of "photo opportunities" has become a key element in the marketing of candidates.

There are two types of photos you should maintain. The first type is the *stock image of key individuals* in your agency, both line staff and managerial staff. We recommend that these be created by a professional photographer. These photos are useful with press releases, public relations kits, in newsletters and annual reports, and can be included on some kinds of brochures. They should be accompanied by a brief biography (professional help can improve the effectiveness of a written biography—check with local Public Relations firms and consultants). The second type is the *historical photo*. Any time an event occurs which can lend credibility to your agency, be sure to acquire photographs of that event. This includes visits by dignitaries (even minor ones), celebrities, and politicians; special events, such as fundraisers, annual meetings, and award ceremonies, and other milestones such as the opening of new facility. These photos have similar uses as the stock photographs, but can often be used in a more pointed fashion.

Be sure to maintain your prints in files with negatives, so that you can produce duplicates and enlargements as necessary.

TIP: if you are publishing a photo, have a graphic design house or printer make a half-tone copy of it, and use this copy for your print master.

71
Reprint Articles About Your Program

Whenever you have an article published, or when there is a favorable article about you in a newspaper or journal, latch onto it as a marketing tool. Have reprints made, and include them in your promotional packets. Reprints can remain a potent marketing tool for years after the original article appeared. You can also quote from these articles in your brochures, workshop flyers, and other pieces.

This is especially effective if the publication is prestigious. Feature the quote, and just under it the name of the periodical. This tactic is an illustration of what is called "leveraging" in marketing lingo. By associating your program or products with the name of the periodical, you are using their established credibility to enhance your own.

Section J: Public Relations Tactics

72
Make Ethics Your Top Priority

Be ethical. Be fair. Follow the Golden Rule. Nothing will market your services better than your good reputation, and that reputation can only be earned over the long haul.

The prevention field lacks it's own code of ethics, but there are other fields which have codes of ethics that can serve as models. Seek them out and study them; incorporate them into your program protocols. Review your code of ethics with staff at least once per year. And don't tolerate unethical behavior in yourself or in those you work with.

The politics of health promotion can get pretty brutal at times, as anyone who has been in the trenches for a while can testify. Out of these politics, often rooted in competition for limited funds, can come any number of unethical behaviors. Gossip is one of these—the widespread practice of attempting to influence others in one's favor by denigrating one's competitors. A superior approach is to offer the best possible services, and to find effective ways to help prospects understand exactly how these services will benefit them and help them to reach their goals.

73

Consider Client Opinions

When you are approaching a client who is resistant to working with your agency, it is helpful to solicit suggestions from the client. For example, you might ask, "What do you think is most important for a program to do in order to succeed here," or "How do you think it would work if we did so-and-so?" Listen carefully; you will gain valuable information. If you begin to incorporate this knowledge into your offering to that particular client, by modifying the services you are selling, your chances of eventual success will be greatly enhanced.

TIP: This tactic can be strengthened by occasionally reinforcing it with correspondence, stating your understanding of the prospect's needs and your willingness to adapt your program to those needs.

74

Turn Complaints Into Advice

How does your staff handle complaints? Do your clients feel that they will be *listened to?* Remember: when a client makes a complaint, it is a golden *opportunity* for you to bend over backwards to make that client happy. And a happy client remains a client. On the other hand, an unhappy client whose complaint was not well received will be sure to share his or her feelings with others.

With your staff, develop a complaint policy. Start the meeting with a discussion of the ancient adage, "The customer is always right." Then develop a policy, which should include:

- Recognition of the positive value of complaints—they may contain valuable information which will help you to improve your services and keep a competitive edge.

- How to immediately respond to a person who is complaining, and what specific steps to take to get management involved in a strategic response to the complaint (e.g. verifying validity of the complaint and taking programmatic, procedural, or personnel actions in response).

- How to encourage people to complain when a problem comes up. Experience indicates that many complaints remain underground, and if they are heard by program staff it is usually second or third hand.

Suggestion: How about publicizing a "program guarantee" that gives recourse to dissatisfied clients?

75

Apologize for Mistakes and Poor Service

When you make a mistake, promptly acknowledge your mistake and make amends. This is a basic principal of human relationships, but it is surprising how often it is overlooked in business settings. As a marketing strategy, prompt, genuine apologies foster respect and help to cement working relationships. Failure to apologize is guaranteed to destroy any shred of confidence that your client had previously placed in you.

Of course, before you can apologize you must be aware of how you have disappointed your client. The best way to maintain that awareness is to continually listen to your client, and to listen to your grapevine and what it tells you about your clients. When a rumor surfaces that indicates somebody may be unhappy with the service you have given them, call them directly and check the rumor out. Chances are, it's just that - rumor. But don't take a chance and miss an opportunity to apologize for a mistake. When properly handled in this manner, your mistakes become yet another marketing opportunity, and can actually work to your advantage.

76

Reception is a Marketing Position

Your receptionist is your link with the outside world. Most people first contact your agency, and therefore form their first impression of it, through your receptionist. Because of this, the importance of your receptionist to your overall marketing efforts is not to be underestimated.

There are a number of characteristics that can make a receptionist an effective marketing agent:

- intelligence and good judgement
- tone of voice
- grammar and diction
- appearance
- courtesy and tact
- accuracy
- initiative

- and so on.

If your receptionist is lacking in any of these areas, you should evaluate how much damage might be caused to your marketing campaign. If your campaign is weakened, you have several options. You may terminate or transfer your receptionist. You may increase supervision and training of your receptionist. Or you may ignore the situation; if you do, don't blame the receptionist for the damage which occurs because of your inaction. It is important that you provide the will to create a favorable marketing climate, beginning with reception.

77
Warmly Welcome Visitors

How do your staff answer the phone? How do they greet customers? The *personality* of your program and of your product is communicated through your *people*. Consider taking time with staff to discuss and role–play different reception situations. Help each other fine–tune how you present yourselves.

Here are some suggestions:

1. Role–play greeting a client who comes into your office.

2. Role-play answering the telephone.

3. Role-play meeting with a client in the client's office.

4. Tape record a brief telephone conversation with each staff member (Radio Shack has inexpensive microphones for this purpose). Most people have no idea how they sound on the telephone; by listening to themselves they get valuable feedback. You probably will not have to make any suggestions for improvement at all—they will come up with plenty of good ideas.

TIP: One very successful agency has a policy of *always* answering the telephone *before* the third ring. This is one point of its six–point total marketing strategy!

TIP: The receptionist of your *client* can be an important ally. Be sure to remember and greet the receptionist by name when calling. Your chances of getting connected with the boss will be improved when you do.

TIP: Before hiring a receptionist, call the candidate at home. Note the tone of voice and other characteristics of how the telephone is answered. This way you can be sure that you are hiring someone whose voice will make the impression you want it to make.

78
Involve Your Board in Marketing

The Board of Directors of your non-profit organization may play a large role in management and in determining how the resources of your agency are allocated. If you want significant resources allocated to marketing, it is your responsibility to be sure that your board understands how marketing will help your agency meet its objectives. To accomplish this, you should arrange to *make a presentation on marketing to your Board of Directors*.

In some cases, your board may be more receptive to a presentation on this topic made by consultants. Either way, you should be prepared to make some *concrete recommendations* for marketing strategies. Your presentation should clearly identify what the *costs* are for each strategy (in cash, staff time, and other resources) and exactly how each strategy relates to one or more specific program goals. By gaining the support of your board, you will have greater freedom to pursue creative marketing ideas.

79
Catch A Rising Star

As a long–term marketing strategy, both for your agency and for you personally, this one is hard to beat. Every organization has it's stars—those outstanding individuals who are bound to succeed. While it is difficult to gain significant access to many CEO's, it is relatively easy to connect with the stars, once you have found out who they are.

Once you know their identities, begin a serious *campaign* to develop strong working and personal *relationships* with them. As these stars follow their destiny, you will one day find that the network you have developed includes CEO's and others who can open doors for you and your effort. In drug abuse prevention, the people to watch for are the bright young administrators in school systems, the political activists who will one day be on your Board of Supervisors or in your Mayor's office, and the corporate employees who will eventually determine how a corporations charitable giving program funds are allocated.

80

Make Friends

The *human bonds* you form, based on your sincere appreciation of others, have the side effect of vastly increasing the potency of your long-term marketing efforts. Friendships with people at every level within client and prospect organizations have a way of weaving together into a network which becomes a source of information, opportunities, and support.

Notice that we say every level—from the student intern, to the receptionist, to mid-level executive, to the CEO. Each friendship has value, and it's precise value cannot usually be predicted.

81

Personal Contacts—A Marketing Priority

One of the most powerful marketing tools available is *personal contact with clients*. This strategy is so effective that one major health care corporation with hundreds of hospitals across the country credits it's phenomenal success in gaining referrals to this marketing strategy. Program directors in this organization are expected to spend fully *half* of their work time making personal contacts.

Here's a way to visualize this strategy: you are in a wilderness criss–crossed by many faint and hard-to-follow trails. Each time you visit a client, the trail between you and the client gets a little more worn in, and so becomes easier to follow. And the trails which get used the most are those which are easiest to follow. Your persistent personal contacts will eventually create an entire network of trails which, out of all the choices in the wilderness, lead to your services.

How to handle yourself and your client during a personal contact is a whole art form in itself. This is where your social skills come into play, and is why social skills are an important prevention strategy, not just to be taught to school children, but to be mastered by prevention professionals.

82

Use the Split–Second Follow-Up Technique

This is a tactic which entrepreneur Mark H. McCormack refers to as "splitting seconds." The procedure is to make a commitment to an event at a future date, with the express intent of sticking to your commitment *exactly*. In the small details of the commitment are the opportunity to create a positive image.

For example, when a client requests some information which will require that you do some research prior to answering, be very specific about when you will get back with the information: "Bill, let me call you back on that after I've had a chance to check into it. Will you be in your office Monday at 9:00 A.M.?" After making these arrangements, call at *9:00A.M. exactly* on Monday morning. The strategic use of this technique will help you build a solid reputation with your client or prospect, especially if you are equally conscientious about how you manage all of your affairs in general.

TIP: The more exotic the location from which you return a call like this, the more impressive it is. Suppose that you are in a conference in Hawaii on Monday. You can calculate the time differences, and then make your call. Tell the receptionist that you are calling from Hawaii; this information will almost certainly be passed on to your client.

83

Make The Boss Look Good

The satisfaction of your client is always improved when your services enhance the client's image. You want to make the client look good, by linking the client with the successful outcomes of your service. For example, a decision to buy into a student assistance program may be a very risky one. A high school principal who makes this decision may feel that if the program fails, chances for eventual promotion to district superintendent will be compromised.

Your marketing will be improved if you work to make such a decision look good. A couple of approaches:

1) Assemble a press kit for your program, which the client can give to the press. Your program will be mentioned in the articles which are written in local media or in broadcast news items, but the benefits of the program will be highlighted in a manner that implies courage, vision, and intelligent leadership on the part of the client.

2) Periodically create attractively formatted progress reports, and feature your contact prominently on the report with a title such as "Project Director" or "Project Liaison."

3) When the project goes bad, be willing to take the rap if it's because of you or your staff.

4) Keep your client fully informed. Nothing will generate resentment so fast as when your client is asked a question and a colleague from another division (or school site) knows an answer that your client doesn't. Copy your client in on correspondence related to the project or services you are providing; have a social lunch together on a regular basis.

84

Community Involvement Builds Relationships

Being involved with civic groups, service clubs, and grass-roots organizations helps to build *personal networks*. Every community offers many opportunities to become involved. Usually the benefits to your program are entirely unpredictable, but extremely real and powerful.

Consider encouraging your prevention staff to use one or two paid hours per week to participate in a community group. As a perk, it will boost staff morale; as a marketing strategy, it will build bridges to new territories and pay off in surprising ways.

85

Sponsor Contests

Sponsoring contests gets the community involved with your agency, and can help to achieve prevention goals. A popular version of this tactic is the poster contest. An agency sponsors a poster contest and enlists the cooperation of schools. Students create posters that demonstrate a theme, such as "Say Yes to Life," which the agency provides. The agency then empanels some judges who choose the most effective poster, which is made into a billboard. Other entries are displayed at local shopping malls and other public areas.

A contest such as this can help to establish an image of authority and expertise for your program. It builds "warm fuzzy" associations to your program name. And because of it's popularity, it can be an opportunity to get influential people involved with your program. Contest judges, for example, may include politicians, business leaders, and representatives of community service groups. If you use your imagination, you will quickly realize that there are many other types of contests and roles for participants.

86

Hold An Open House Annually

Most agencies host an "open house" event when they move into a new facility. But there is no reason to restrict this tactic to that special occasion. There are many other occasions which lend themselves to an open house or a reception (which has the same function). Introducing a new program component, new staff, or a new publication are a few examples. If a staff member receives an award, a reception can highlight the honor, and increase your chances of press coverage (remember to invite the press!). If you are alert to opportunities, many others will occur to you. However, the open house strategy can be overused, so resort to it with discretion.

Some tips for planning an open house:

1) Assign staff to specific areas or to make presentations on specific program functions.

2) Have volunteers function as tour guides, and introduce guests to each staff person they encounter. This enhances the exposure to program personnel and information that guests will receive.

3) Notify guests well in advance. The preferred format is a mailed invitation printed on a nice card.

4) Send a press release to local media about three days before the event.

5) Feed your guests. You may find that a local restaurant is willing to donate catering for the event.

6) Thank your guests for coming, and send follow-up thank you letters (keep a guest register and/or a fishbowl for collecting business cards).

7) Offer appealing "mocktails" (non-alcoholic mixed drinks) as a way of demonstrating the serving of enjoyable non-alcoholic drinks at social gatherings.

8) Be sure that names are transferred from the guest register to your mailing list.

87

Send Holiday Greetings

Sending an annual holiday greeting card may be a cliche, but it is effective and helps to maintain awareness of your presence in a pleasant and friendly way. You can buy holiday greeting cards in bulk, and sign them individually, or you can have cards pre-printed with your agency or program name.

Many agencies send generic "Best Holiday Wishes" cards, rather than cards which refer to a specific religious festival. This is done in order to avoid alienating those who are not of a specific religious conviction. If done tastefully, it reflects well on your agency.

88

Practice The Art of Giving Gifts

Gifts can be very powerful marketing tools. When we began introducing student assistance programs into Tulare County, we reviewed the literature which was then available. The best, in our opinion, was Gary Andersen's book, *When Chemicals Come To School*. Our staff studied the book until we felt we understood the model. We then purchased 25 copies and presented one as a gift to a key person in every district in which we wanted an SAP established. Expensive? At $24.95 per copy, you bet. Cost-effective? As it turned out, the combination of giving these books and making personal contacts was one of the most persuasive marketing tactics we ever used.

Your funding sources may take a dim view of a budget line item labelled "gifts." Ours have been paid for from our educational materials budget item. This is legitimate because that is exactly what they are—educational materials that help clients make informed decisions about the prevention and intervention programs they choose.

Section K: More Marketing Ideas

89
Keep Up-To-Date Résumés

You can use a word processor to keep up-to-date résumés for each of your key staff persons. These résumés are very useful tools for at least two marketing applications: 1) They can be used as attachments to strengthen funding proposals. 2) They can be given to clients and potential clients to help them understand the abilities and limitations of staff. In addition, maintaining a good résumé can actually help staff to maintain esprit de corps.

There are many excellent books on creating résumés, available in the business section of any of the chain bookstores.

90
Use Job Descriptions to Market the Program

Are your clients and prospects confused about each other's jobs? Are your staff confused about what the jobs of each other are? Confusion about roles can hamper communication with your clients, and might damage your marketing campaigns.

Each staff member should be skillful at giving a concise and useful answer to the question, "What is your job?" In the trenches of prevention work, where program activities tend to constantly fluctuate and evolve, this can be a difficult question to answer. But consider how an ambiguous and confused answer will affect the client or prospect. It will reflect poorly on both the staff person and on your program. Ideas:

1. Check out your job descriptions. Do they *match reality?* Have each staff member write a job description of what they *really* do, and then compare these to the formal job descriptions that exist for them. If you don't have formal, written job descriptions, either have a bulletproof philosophical (or managerial) reason for avoiding them, or create them at your very earliest opportunity. If you do have them, it is a good idea to update them at least every two years—annually if possible.

2. Have each staff write a two-sentence (40 words maximum) summary of what they *actually do* in their work.

3. Staff can critique each other's summaries, and help each other to refine them until they accomplish the goals of *clarity* and *usefulness.*

4. Each staff should *memorize* and *use* the summary they have written. This tactic is similar to a memorized "sales pitch"—contrived, but effective.

5. If you want to get the most marketing benefit from this strategy, have staff memorize *each other's* job summaries. This will greatly aid your external marketing efforts; it will also improve your internal functioning by initiating and facilitating staff cooperation.

91

Understand Organizational Culture

Each one of your clients—whether an agency, school, individual, decision maker, government entity, or philanthropist—has a unique "personality." In the case of organizations, this personality is known as the *organizational culture.*

For example, take a medium sized school district which you have targeted for student assistance programs. One of the biggest problems you will likely face is knowing who in that school district is going to make the decisions about contracting for student assistance programs. Don't be misled by titles. And remember that it's not just a question of *who*, but also of *what process* the organizational culture imposes upon decision makers.

When you begin to learn the answers to these questions, you can identify specific points to target with your marketing efforts. These points can be individuals, in which case you will want to make personal contacts for the purpose of building a relationship; or they may be *process points* where you, your staff, and your allies within the organization can actively influence the process by which decisions are made. The more you know about your client, the smarter your marketing can work. You can accomplish far more in less time by tightly focussing your efforts where they really count.

TIP: It can be hard to separate facts from opinions. Try developing a dossier on your clients. Brainstorm a list of all the information about your client which you and your staff can think of Then, as objectively as possible, evaluate each item on the list to decide if it is a fact, or an opinion. This will give you a good start for developing a marketing strategy for that particular client that is rooted in reality.

92

Send "FYI Packets" To Tightly Defined Segments

You can periodically use this tactic to maintain existing relationships and to develop new ones. It is best used with a fairly selective list of clients and prospects—the "blue chip" market that you are most committed to serving. By using this strategy you accomplish four goals simultaneously. First, you remind people of your existence. Second, you keep them informed about your services. Third, you provide an opportunity for them to become better educated about a specific aspect of prevention. And fourth, your status as an authority is reinforced by the association of authoritative materials with your cover letter.

A "For Your Information" Packet consists of at least two main components:

1. A form letter which describes what services your agency is currently providing. In this letter, highlight some recent successes, and drop the name of one of your more prestigious clients (always assume that this client will read the letter). The letter may also indicate what directions you anticipate your services will take during the next year. If you use a word processor with a mail merge function, you can personalize each form letter with name, title, and even a sentence or paragraph with a personal comment. The form letter will also reference the second set of items:

2. One or more ***information resources***. Brochures, copies of magazine or journal articles, even books, can be included. The information presented in your selection should ***support*** your programs, without being specifically ***about*** them. For instance, detailed booklets costing $1.50 each are available from Hazelden and do an excellent job of explaining student assistance programs, professional enabling, and so on. There is also a great deal of free or low-cost literature which can be used for this. Many government publications (such as those available through the National Clearinghouse for Alcohol and

Drug Information) can be ordered in quantities of up to 50 for no cost.

You may also want to include an inexpensive advertising specialty item, such as a pencil or pen with your program name.

93

Listen! Listen! Listen!

The most fundamental skill of human relations, and therefore of marketing, is *listening*. It also happens to be one of the primary skills of community-based change agents. But it is not safe to assume that your staff have mastered this skill; after all, it is rare that a person learns to listen *really* well unless they have had some specific training that enables them to do so.

There are several steps you can take to help build the listening skills of your staff.

1) When recruiting, consider hiring people whose backgrounds include training to provide counseling or psychotherapy. Chances are they have well developed listening skills, and as a bonus also understand how systems work—crucial knowledge for prevention program planning.

2) Have a discussion with staff from time to time which focuses on listening skills, and on listening as a prevention strategy. Assign some homework to each staff, to make a contact with a client in which they simply listen, then have staff report back on what they learned.

3) Evaluate listening skills on a case–by–case basis. It's not hard to do so; simply have a conversation with each individual.

4) When skills are obviously lacking, send that person to training on communication and listening skills. This training could be a counseling class, a parenting class, or a training of trainers in a parenting class

such as Parent Effectiveness, or Systematic Training for Effective Parenting.

When your staff listens well, there are powerful benefits to your marketing efforts:

- Your clients perceive your organization as genuinely caring;
- Your staff gain valuable insight into the needs, goals, and dreams of your clients, which can strengthen your strategic planning (provided you have a process which allows for the information to be considered);
- You gain information on how your clients are evaluating your services—are they satisfied, dissatisfied, do they need modifications or increased attention? Knowing the answers to these questions can help you maintain a competitive edge - provided you listen.

94

Maintain An Arsenal Of Support Letters

Letters of support from satisfied clients are an important weapon in your marketing arsenal. People tend to believe testimonials more readily than other forms of advertising. Letters of support can be used in many ways. We regularly use brief quotes in our grant proposals, sharing the positive comments past fundors and clients have made about our programs. Excerpts can be used in brochures and other promotional materials; before doing so, however be sure to contact the author and get permission. And copies of letters of support can be attached to your reports to funding agencies.

To get support letters, you generally have to ask. That's why we recommend that once each year (springtime is best) you personally telephone each of your clients and ask them to write a letter of support. Since many people have a hard time composing a support letter, it is often helpful to follow-up with a memo suggesting some ideas. Here is a memo we have seen used:

> Dear (client name):
>
> Thank you for agreeing to write a letter of support on behalf of (program name). If I may, I would like to suggest several points for your consideration when writing this letter:
>
> - How have we been helpful to you? Have your programs, services, or clients benefitted? How?
> - Have our staff been effective? How so?
> - Any anecdotes you remember which help to illustrate our effectiveness would also help.
>
> I want to tell you how much I appreciate your willingness to write a letter of support. Not only will your letter help to keep staff morale high, it will help to reassure our funding sources that that they are making a wise decision when they invest in the services our program offers.
>
> Sincerely,
>
> (Name)
> Executive Director

95
Maintain Your Mailing List

Your mailing list is one of your most important marketing tools. It deserves careful management to keep it up to date. In addition, a well-designed mailing list can be used with a great deal of flexibility, so you can focus your mailings on very specific target groups.

Use a computer database program to create and manage your mailing list. Then develop procedures to steadily expand it and keep it up to date. You may be able to network with other agencies which already have mailing lists, and trade or rent from each other.

In some cases you may find it worthwhile to contact a commercial mailing house. These can manage your mailing list for you, and will label, sort, and deliver your mail to the post office. They may have ready-made lists which will reach your target audience. Look in the yellow pages under "Mailing Lists" and "Mailing Services."

96

Become An Author

Periodicals are always looking for well–written articles. Getting an article published can help your marketing campaign in several ways; not least among these is the credibility you will gain. People tend to associate publication with credibility and leadership.

When writing an article, consider these points: 1) What publication are you writing for? Try to emulate the tone and style of the publication, but don't lose your own voice in the process. 2) What do you have to say? Program profiles are boring; personal opinions and stories are interesting. 3) Is your topic timely? Connect your article with the big picture in some way, to establish it's timeliness. 4) Is the publication interested in your article?

It never hurts to contact the editor and ask for a reading on whether they are interested in your article. If you do have something to say, and somewhere to say it, then write your article.

TIP: Plan on several drafts before you have a finished piece for submission. Always ask at least two or three other people to read you essay and comment; if they are honest and smart, this will significantly improve the quality of your piece, and the likelihood of it's acceptance for publication.

97

Use The Power Of Personal Letters

Letter writing is an excellent marketing strategy that is inexpensive and consumes little time. A letter can help you to connect in a *personal* way with key individuals who influence your access to a given market.

There are many occasions for writing a letter; in fact virtually ***any*** public contact may be followed-up with a note. For example, you might write to someone you briefly met at a seminar or other gathering.

Your letter should, however, be concise and avoid excessive personal self-disclosure. While you might express an opinion about a program or activity related to work, you should avoid writing about your politics, love life, or religious convictions (unless you know for sure that these will elicit a positive response!). You should express appreciation for the work that the individual is doing.

Your letter is never complete unless you suggest a ***response***—such as a personal meeting, or getting back to you with an answer to a proposal you may have made.

During each of the last four years, I have made calls on a local school district superintendent to try to sell him on student assistance programs. After each visit, I immediately write a letter thanking him for his time. Usually I enclose a brochure or newspaper clipping about a student assistance program. So far he has resisted. But I am confident that eventually this tactic will get us in the door.

IDEA: Circulate a sign–in sheet for names and addresses at your next workshop or educational presentation. Afterwards, sit down and write a letter to a few participants, thanking them for coming. You can bet that they will mention your thoughtfulness to a few colleagues.

98

Market Within Your Own Organization

Marketing is about getting clients to believe in you, and to become committed to your products and services. Internal marketing carries these same goals to your staff. If your marketing efforts are to succeed, staff need to know why your programs are superior; they have to believe in what they are doing. They also need to feel that their work environment is a place in which they can fit and be happy. Clearly, then, your personnel management policies and practices are closely connected to the success of your marketing efforts and of your program outcomes.

Here are some ideas for internal marketing:

- Keep staff informed: Review your marketing plans with staff so they know where you are heading, and why. Also keep staff posted on programmatic and operational changes. Otherwise they may feel left-out and foolish, and this will erode their confidence in your program—and you can bet that their lack of confidence will be communicated to your clients.

- Market *vertically* and *horizontally* within your organization: If you are one of several programs operated within an agency, you will benefit by making presentations which sell staff from your administrative offices on what you are doing and why marketing will help the agency reach it's goals. If you work closely with other programs within your agency you may feel a degree of competition with them. Don't let this stop you from marketing to them—by doing so you may help to create a new environment of collaboration, which may strengthen everybody's efforts in the long run.

- Training: keep your staff skills sharp and up-to-date. Your training budget should be substantial. From time to time you may find that your funding sources object to a large training line. We have found it helpful to explain that the technologies of prevention are constantly changing, and that it is therefore mandatory that our staff be continually trained so that we can fulfill our obligation to transfer these new technologies back into our local communities. One agency we know of actually provides a scholarship program which, combined with a generous release time policy, helps staff to earn advanced degrees.

- Compensation: continually work to develop better compensation, including salary and benefits.
- Perquisites: identify the perks of the job, and *encourage their existence.* Do your staff have flexible work hours and a large degree of autonomy? Feature these perks in your communications with staff.

99

Become A Clearinghouse

Some time ago a group of prevention professionals began receiving—without asking for them—monthly packages of information from government clearinghouses. These included major research books, program implementation manuals, posters, brochures, and bulletins—in short, some outstanding resources.

Why did some prevention professionals receive these while others didn't? The answer is simple. Those who did were members of SALIS, the Substance Abuse Librarians Information Service. SALIS had made arrangements to help build the resource libraries of it's members by locating and distributing these free government publications. When the time comes to ante up for renewal of membership, what do you think members will do? They'll reach for the checkbook, that's what, and they'll do so gladly.

People love to get anything that is free, and there is a lot of free information available. The government operates several clearinghouses. Your agency can do so also, even if it is on a small scale. Here's how:

1. Extract from your mailing list a sublist of people whose support is especially important to you. You

may have no more than 5 people on this list, or as many as 100.

2. Begin searching out free resources (or low cost resources if you can afford them) and assembling "Clearinghouse Resource Packages" which you mail every other month or so.

3. Package and mail them with a cover letter on your program letterhead. This letter should state that you are sending the materials as a special service to your clients, and it should list each item included in the packet. You may also include brief summaries or reviews of information in each item, and even suggest specific short readings for the busy client.

100

Create a Welcoming Environment

The *appearance and ambience of your facility* communicates a powerful message to visitors about your organization. If your clients visit your office, your decor should be considered when planning your marketing. This is not to say that an expensive, professional look should always be your goal. In most cases that is probably effective. However, among community–based organizations it is rarely even possible, and may not be appropriate. You will have to judge this for yourself, but the important part is that you do judge it.

Don't simply accept hand–me–downs and bargain basement mismatched furnishings in an unintentional fashion. You will end up looking hayseed and disorganized to your visiting clients. Instead, *develop a plan* for decor and *stick to it*. It may take years to build, but if you have a plan to guide your furnishings, colors, and other decor, you will eventually create a work environment that is pleasant, helps to maintain staff morale, and advertises your professionalism.

101 and more
Your Favorite Tactics

We have left a couple of blank pages at the end of this chapter so you can make notes. We have noticed that during our two-day marketing seminars participants frequently share other ideas that they have found useful. No doubt you will have the same experience. Write your ideas in the space provided below and on the next page.

4

Creating a Strategic Marketing Campaign

This chapter will help you to plan a strategic marketing campaign. You will determine a tentative direction for your marketing efforts over the next five years, and develop a plan of attack for the next 12 months.

When you have completed this chapter, you will have created:

- A **Goal Statement,** summarizing how you would like to see your product positioned in the future;

- One or more **Marketing Objectives,** which will help to position your product according to your goal, and will provide a means to evaluate your progress;

- A **Strategic Plan** which puts your product into historical perspective and projects it's future development, thus helping you to develop marketing tactics which will remain useful and relevant for some time.

• A **Tactical Plan** that will guide your marketing activities for up to one year. It will focus on a small part of the strategic plan.

• A **Budget Projection** that will help you figure out what your marketing efforts are going to cost, and provide a basis for adjusting line items in your operating budget.

What is Strategic Planning?

> **Stra-te-gic** *adj* **1. a:** necessary to or important in the initiation, conduct, or completion of a strategic plan **b:** of great importance within an integrated whole or to a planned effect **2.** Designed or trained to strike at an enemy at the sources of his military, economic, or political power.
>
> *-Webster's New Collegiate Dictionary, 1981*

Strategic planning means intentionally charting a course for the future. Whenever you plan a sequence of activities in advance, in order to achieve a clear goal, you are thinking strategically.

Strategic planning does not have to be a complicated task; it can actually be quite simple. There are just a few requirements for creating an effective strategic plan. These are:

- An ***understanding*** of the *present.* Where did your product come from (what was the original intent of the product), and how is it working out at present? (This topic was covered in Chapter Two.)
- A *vision* for the *future.* Where are you heading? (An opportunity to reflect upon your vision and to develop it further was included in Chapter Two.)
- The ability to *translate* this vision into one or more measureable *outcome objectives.*
- The ability to create a *plan of action* which will lead accomplishing these objectives.

In this chapter you will learn a process through which you may define at least one outcome objective; and you will become acquainted with two tools to help you plan a sequence of activities to accomplish your objective (the Strategic Planning Form, and the Tactical Marketing Plan).

Setting Your Marketing Goal

Goals, objectives, and action plans are three different parts of an overall picture. This picture can be called by many names; a proposal, a vision, a business plan. What is important here is to develop a clear statement for each of these. The most helpful order in which to do so is to first set a goal, then narrow that goal down into one or more specific objectives, then develop an action plan from which you can achieve your objective(s).

The product positioning strategy you developed earlier (Chapter 2, pages 44–46), is actually an outline for creating a sophisticated goal statement. That statement identified what your positioning goals were for one year from now. You can condense this goal into a brief statement, and extrapolate it into the future.

Example:

Prevention Wizardry, Inc. will field 4 full-time professional consulting staff supported by 2 office staff. We will specialize in providing prevention consulting services to a clientele of school districts, county governments, non-profit agencies, and state government agencies in Northern California. We will be recognized as experts in school-based prevention and early intervention programs, providing staff training, program planning and evaluation, and organizational development. High demand for our services will enable us to be selective about clientele and assignments, and to command premium fees. Revenue in excess of actual costs will be used to support product and professional development, and to provide *pro bono* services to worthy organizations.

This goal statement is quite detailed, and you may find it more useful to create a more condensed statement for your agency. For example:

> "We will become a recognized resource for prevention consulting services statewide."

Activity

Review your *Positioning Statement* from chapter 2 (pages 44–46). Then use the space below to create a detailed *goal statement* for the position you would like your product to achieve in it's market area.

The Strategic Plan

There are many different methods to create a strategic plan. The one we recommend here has the advantages of being *simple, visual,* and *easy to create and modify.*

Here are the items you will need to create your strategic plan:

1. A specific product to market (defined in chapter two);
2. A positioning plan (defined in chapter two);
3. The goal statement you developed earlier in this chapter;
4. The Strategic Planning Form included in this manual;
5. A pencil with an eraser.

To use the strategic planning form, follow these steps (refer also to the example on the next page):

1. Write the name or description of the product for which you are developing a marketing plan in the box in the upper left portion of the form.

2. Write your marketing goal in the next box to the right. Condense it to fit in the space provided.

3. The chart is divided into years along the next row down, and into two items, "segmentation" and packaging" along the left side. In the *segmentation* row, write in each market segment that you wish to market your product to. You will identify the segment under the year(s) which best fit your overall marketing strategy. For example, you might want to market consultation services to districts in your county for several years, and then build on that experience with a nationwide campaign to market your expertise about developing school-based programs, beginning in the fourth year (see example).

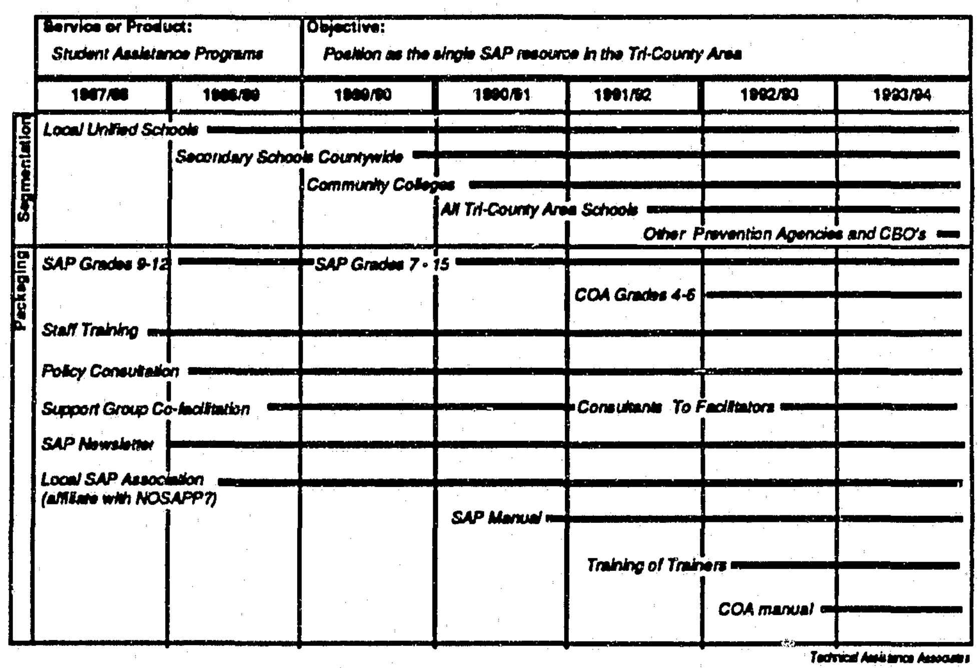
4. Use *horizontal bars* to indicate in which years each element of your strategic plan will be implemented (see example). These bars should indicate a *logical sequence*; for example, you

would need to create and field–test a curriculum before marketing it; therefore, you would draw a line showing during the first year creating and field–testing the curriculum and developing a cadre of staff consultants to support its dessimination, and in the second year advertising and distributing the curriculum. Training of trainers programs, curriculum upgrades, and additional lessons might be planned for subsequent years.

5. As your *product* develops, the *package* will also develop. You can plan a packaging strategy to complement your segmentation. You can further subdivide this section if you wish. For example, you might want to add a row for "pricing" or for "staffing pattern" or for other strategic considerations.

You may feel that creating a chart such as the one which follows is an exercise in fiction. You are right. Actual events will not follow the exact path you predict. You will need to modify this plan as time progresses. But it is important to remember that those with plans create the future, and those who have no plan must accept whatever the future sends.

Strategic Plan: An Example



The example plan on the previous page is for development of a student assistance program over a period of seven years. The plan does not contain details, but paints a ***broad picture*** of a *logical sequence* of *program development.* New components are added in a logical order, based upon successful development of earlier components.

In practice, the actual development of a program often follows such a strategic plan very closely. When you set clear goals, the small decisions you make on a daily basis are affected by these goals. Over a period of years, many small decisions add up to large results – *if* you are guided by a plan.

Writing Measureable Outcome Objectives

Now that you have a strategic plan, you will need a tactical plan for immediate implemention. To guide this, you need to develop a *specific* marketing objective for the next twelve months.

A *measureable outcome objective* for marketing your product grows directly from your goal statement. It can have a wonderfully clarifying effect on planning specific action steps, and is in fact a kind of bridge between your goal and your activities. It extracts a specific small segment of your strategic plan, and creates a very specific framework within which planning to accomplish that one small part can take place.

What precisely is a measureable outcome objective? Let's define it, one word at a time:

Measureable: It is possible to measure progress according to some *concrete standard*, within a specified *time limit*. There is a *specific quantity* involved:

Not Measureable	Measureable
We will get more people interested in student assistance programs	Three schools will initiate student assistance programs by July 1 of this year.
We will increase membership in our community action group.	Membership will increase to 250 persons by July 1 of this year.
Establishments which sell alcoholic beverages will use safer serving practices.	Server intervention training will be provided to 15 waiters and bartenders by March 31 of this year.

Outcome: This is the piece that is missing from many otherwise acceptable objectives. It is the "so what" of your objective. When your objective is written so that a *result* is included, it is an outcome objective. If it is written so that only a measureable amount of *activity* is included, it is not an outcome objective. Compare the examples below:

No Outcome	Outcome Included
We will provide student assistance program training to staff of 5 school sites.	Three schools will initiate student assistance programs by July 1 of this year.
We will personally contact 400 individuals to recruit them as members of our community action group.	Membership will increase to 250 persons by July 1 of this year.
Server intervention training will be provided to 15 waiters and bartenders by March 31 of this year.	Three bars will actively use server intervention methods on a regular basis by March 31 of this year.

Note that the third pair of example objectives above both meet the criteria of being measureable and time-limited. The one on the left, however, is a *process objective;* it describes an *activity* that will presumably help to achieve an outcome, but it does not specify what that outcome is. The proper place for such process objectives is on your action plan.

Many agencies make the mistake of substituting process objectives for outcome objectives. The result is almost always a lack of focus, characterized by an ambiguous sense of purpose.

Origin of an Insight

During the first four years of my tenure as director of a non-residential recovery program, my county contract objective was to provide counseling to a certain number of young people each year—what is known as a "body count" objective, or *process* objective. Each year we exceeded this objective, maintained excellent client records, and conscientiously applied ourselves to learning how to be better therapists so we could use more effective techniques. But something was wrong. I noticed that *very few kids in our program were actually reducing their use of drugs and alcohol* by any significant amount. Were we doing the right thing, or merely doing the thing right?

The next year we added another objective. Not only did we continue with the process objective of the previous year (to serve X number of youth), but we now included an *outcome* objective:

> "During the current fiscal year, at least 50% of clients will attain 30 or more days of continuous abstinence/sobriety prior to discharge (according to self-report)."

This outcome objective became the focus of our program efforts. Staff energy was renewed, program development became reinvigorated, referrals increased dramatically... and a lot of kids began real recovery.

Writing a Measureable Outcome Objective for Marketing

Below are three marketing outcome objectives. For each example, circle that part(s) that are measurable; underline the part(s) that indicate a time limit; and draw a rectangle around the part(s) that indicate a marketing outcome.

By December 31, 1990, ABC Consulting, Incorporated, will have at least 300 days of prevention-related consulting contracts negotiated at an average rate of at least $250.00 per day.

By February 1, 1991, at least 15 decision makers in area schools will have ordered an evaluation copy and demonstration of our social skills training curriculum.

By March 15, 1992, 25% of respondents surveyed at local shopping malls will be able to accurately describe at least one service offered by Mid-Town Community Services.

Now you try it.

To create a measureable outcome objective for your marketing campaign, begin by filling in the spaces below:

Product:

What marketing *outcome* are you seeking (e.g. "people who will buy the product," "the product will be used," "inquiries will be received about the product," and so on):

How will you *measure progress* towards this outcome (e.g. number of units sold):

What is your *time frame* (the date by which this outcome will be achieved):

Follow the directions on the next page to finish writing your objective.

Putting it Together:

Using the data from the previous page, write a complete outcome objective:

Testing Objectives:

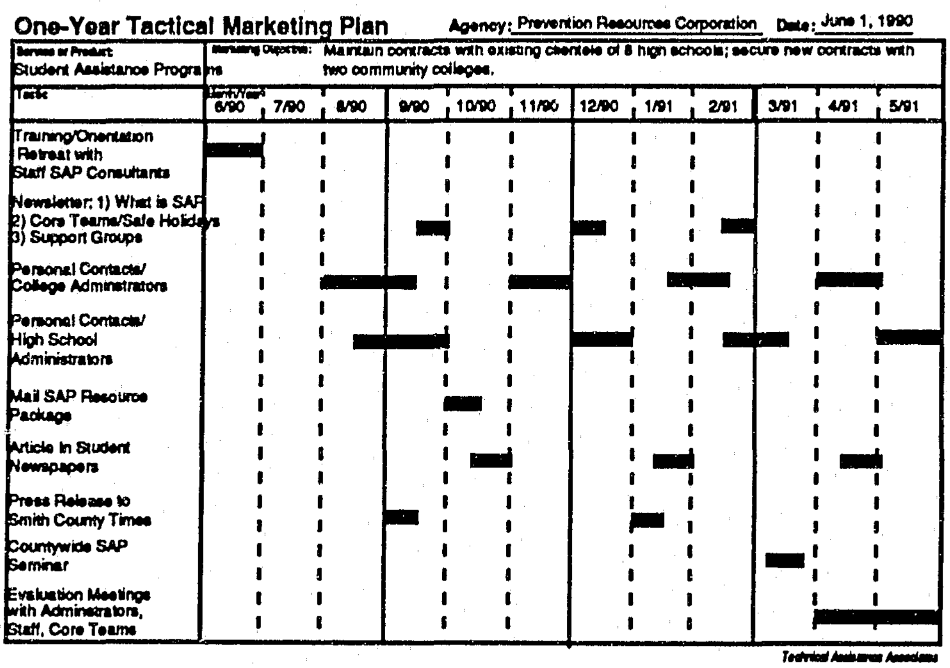
To verify that the objective you have written is complete, *circle* that part(s) that is *measurable*; *underline* the part(s) that indicate a *time limit;* and draw a *rectangle* around the part(s) that indicate a *marketing outcome*. Modify your objective as necessary until it meets all the criteria for an outcome objective.

Additional Marketing Objectives:

Your marketing campaign may be more effective if you have two or three objectives instead of one. We do not recommend that you have more than three objectives. Almost invariably, additional objectives will be process objectives which could be included in your *action plan,* rather than being the signpost used to guide and evaluate the progress of your overall marketing campaign.

One-Year *Tactical* Marketing Plan

The One-year Tactical Marketing Plan expands on a single year from the Strategic Plan. It uses the same Bar Chart format, but covers a period of only 12 months. Focusing on a single year in this way will help you to chart out a logical sequence of marketing tactics to begin using ***immediately*** to achieve short–range goals. Here is an example of a tactical plan:



To decide on the specific tactics to employ, refer back to the *Marketing Tactics Rating Sheet*. Look at those tactics from Chapter 3 which you rated *very useful*. Select some of these to include in your one-year tactical marketing plan.

It may not be necessary to use more than one or two tactics. For example, you may want to focus on idea 45—"Personal Contacts." Your Tactical Plan would then identify one person each week who you would contact personally—even if it's a list that rotates only three or four key individuals. Or, you may want to strengthen this plan with tactics number 30, "Package Your Products," 60, "Develop FYI Packages", and 33, "The Power of Personal Letters."

List the tactics that you will use below:

First, list the tactics that will work best for you. Then, rank them in order from number 1 (top priority) to the lowest priority. When you are finished, arrange them on the form on page 172.

Rank Order	Idea Number and Keyword

Annual Marketing Budget

Marketing costs money. Budgeting is a critical part of creating a functional marketing plan. An accurate budget will be far more serviceable than an innaccurate one. Creating an accurate budget depends to some extent on previous experience. If this will be your agency's first experience with creating a marketing budget, consider it a time to learn by trial and error. This section is intended to help you reduce the amount of error.

You can keep the error to a minimum by carefully researching each cost that you identify. Often, a few quick telephone calls will help you nail down a price for a service or product you need. Once you have a total budget, add 10% to 15% to account for unforeseen extra costs or budgeting errors.

To develop a budget projection, create a form like the one below to estimate costs for each marketing tactic you will use. For example, to promote five one–day training seminars:

Tactic	What needs to be paid for	How many times	What will it cost each time	Total Cost
#49: Workshops	Create handout packets of 12 pages for 500 participants	1	$360.00	$360.00
	Design and Print 18,000 flyers	1	$1160.00	$1160.00
	Mail Flyers to Rented list of 6,000 names	3	$1240.00	$3720.00
	Mail list Rental	3	$180.00	$540
	Rent Facility for 100 participants	5	$85.00	$425.00
Total Cost				$6205.00

Six phone calls were made to arrive at these costs. Two calls were to designers to get quotes for design; one came to our office to talk about the project in detail. One was to our regular printer for two bids: for simply printing from camera–ready copy; and for designing and printing. The fourth call was to a bulk mailing service to discuss their fees for sorting, labelling, and mailing the flyers. They also gave us advice on how to submit the mail list (on what computer software and what type of floppy disk or other storage media) and how to design and fold our promotional flyer so that it would pass through their labelling machines. Two final calls were made to get a quote on renting a mail list (from a federal agency with a special interest in prevention) and to a conference site to determine room rental rates.

Once you have a cost projection, you can adjust your program budget line items to allow for these costs. In the example above, the costs would be distributed to the printing, rent, and postage line items. These costs can be at least partially recouped by charging a fee for the seminar. If you successfully enroll 500 participants, a fee of only $12.50 would more than cover printing and postage costs. A fee of $60.00 (or—tactic #65—$68.50) would cover staff time, facility rental, incidental expenses, and might even *net* revenue for your budget.

Evaluation of Your Marketing Campaign

You will do well to *monitor the progress* of your marketing campaign. A campaign that exists only on paper is no campaign at all. Monitoring your campaign on a weekly basis will help to keep you on track.

Only by continually evaluating your campaign will you learn what works for you and what doesn't. This will help you to create more effective marketing campaigns in the future, by building on your successes and dropping tactics that just don't work.

We strongly encourage you to review your annual marketing plan at each staff meeting. Make it a part of the ritual of your meeting by giving it a permanent place on the agenda. Let staff decide how well each step is working. By doing so you will hone the marketing savvy of your staff, and will maintain their awareness of and enthusiasm for your marketing campaign. If this is not practical, create a marketing group within your agency that meets on a regular basis for evaluation and planning.

5

Management Strategies For Successful Proposal Writing

Grant proposal writing is an important component of the overall marketing strategy for most community based agencies. Proposal writing is an intensive process which requires a range of skills and expertise. The successful proposal writer must have a solid understanding of the theories and skills which are used in the particular program which the grant is intended to support. Because the state of the art in human services is a moving target (perhaps *especially* in drug abuse prevention), strong research skills and a solid grounding in experience are also required. The ability to analyze, synthesize, and coherently communicate complex facts and ideas in writing is essential, and unfortunately, not easily developed. One must be simultaneously a theorist, practitioner, administrator, and writer, if one is to compete successfully. Because such talent is relatively rare, it makes good sense to use it effectively when it appears among your staff. This chapter contains ideas on how to do so.

This chapter does not contain a recipe for how to write a grant proposal. The reader is referred to any of the numerous publications which do so, especially the indispensable *Program Planning and Proposal Writing—Expanded Version*, by Norton J. Kiritz of the Grantsmanship Center. It would be difficult indeed to improve upon this definitive and artful work.

Clearly, proposal writing is not a casual task. Yet it is frequently accomplished in addition to the grant writer's "normal" job description, wedged between the myriad of other tasks that normally occupy the writer's attention. Many veteran grantwriters have had to learn to live with demanding schedules and high stress. Adding to this tangle, many different requests for proposals (RFP)[1] from government agencies tend to come in a brief period of time during the spring of each year. Thus, a grant writer may, in late May, be juggling a busy "regular" schedule while simultaneously doing research for and writing four or more grant proposals. Each of these will typically have a very tight turnaround time (three to six weeks) between receipt of the RFP and the date the finished proposal must be submitted. It's a high burnout job, and each August many good grantwriters resolve to never address another RFP in this lifetime—a resolution which is generally forgotten come the following Spring.

This chapter will therefore present a unique focus in the grantwriting literature. From my years in the trenches, and from conversations with other successful grant writers, I have identified some helpful management strategies for supporting the efforts of the grantwriter. I use as many of these tactics as possible on every

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[1]RFP will be used throughout this chapter to denote a number of different approaches to soliciting proposals. This also include invitations to bid (ITB) and requests for applications (RFA). The differences are usually as follows:

An RFP describes a general program, and requests a detailed and usually lengthy program proposal.

An ITB describes a very specific and detailed program, and seeks bids from agencies, detailing what they would charge to provide the specified services.

An RFA usually asks for a brief summary (about 5 pages) which is in essence a highly condensed program proposal. When a summary is accepted, the submitting agency is given the opportunity to submit a full proposal. Usually acceptance of the initial summary indicates a high likelihood of receiving funding, so in spite of it's brevity, writing the summary is a very serious undertaking.

single proposal I write; others are still on my "wish list." These strategies are key factors which contribute to the unusually high rate of success enjoyed by some grant writers. Using even a few of these suggestions will not only increase your chances of success, but will reduce the stress of proposal writing.

Consider Using A "Hired Gun."

There can be some advantages to using somebody who is not on your regular staff to help with proposal writing, especially if your staff does not include a talented writer. A grant writing consultant can help to provide an objective evaluation of the prospects for successful application; can assist with planning the program to be proposed; and often has developed a network of resources and experience which can be drawn upon to develop a superior proposal.

Here are the basics of hiring a consultant:

- You should pay on a per diem basis, not on a percentage basis. Most funding sources take a dim view of paying a percentage to a grant writer, and in some cases it may be illegal to do so. Besides, few credible consultants will work on a percentage basis—they know that no matter how skilled they are, the competition is enormous and the chances of a payoff are against them.

- It is worth taking the time to verify that a potential consultant has in fact been successful in the past. To do so, conduct an interview in which you ask the consultant to describe in detail the entire process of developing a specific proposal which he or she authored. Also, ask the consultant to supply a list of references who can verify the quality of the work that the consultant has done in the past, and check with these references.

- A credible consultant will not guarantee success, but should have a track record of at least 20% of proposals succeeding.

- Negotiate the top fee you will pay in advance, and discuss what action will be taken if that amount is exhausted through per diem billings before the proposal is completed. A good consultant will build in enough time to complete a proposal, and if overtime is required may be willing to finish the job without billing for the extra time.

- Very few funding sources will reimburse your agency for the costs of proposal development. If you are going to hire a consultant, you must have the funding up front to do so.

Do Your Organizational Homework

Without a clear vision to guide your agency, your grant proposals are likely to be muddled also. This will significantly reduce your chances of success. You cannot communicate a *powerful* vision unless you have a *clear* vision. The strategic planning chapter of this manual discusses this issue in greater detail.

Plan Ahead: Allocate Time and Resources

RFP and other funding cycles are predictable. Take advantage of this by scheduling adequate time for a credible grantwriting effort. It is not unreasonable to assign a full-time staff person to work exclusively on grant proposal writing from February through June. If you have set your sights on a very large program with complex proposal requirements you will want to allocate even more time.

Assigning four full time staff members to work on a single proposal for an entire year is not unheard of; in a few cases it is virtually mandatory to do so if you wish to succeed. Naturally, agencies which cannot absorb the expense of doing so are out of the running. Part of your job as a program marketer is to be able to locate the RFP's and other funding opportunities which are a good match for the scope and mission of your agency.

Train Your Grantwriter

Effective writing—*any* kind of writing—requires a pretty sophisticated set of skills. Proposal writing demands it's own peculiar layer of sophistication on top of that. The practical meaning of this is that a wonderful writer may create inferior proposals.

To solve this problem, invest in specialized training for your grant writer. The best training we know of is offered by the

Grantsmanship Center (see appendix). Five days of training at the Grantsmanship Center may prove very cost effective—provided you coordinate your follow-through with a sensible approach to managing the practical aspects of grantwriting, including those covered in this chapter.

Manage Your Information—Use A Computer Database

The information contained in one proposal can often be used with only minor modifications in other proposals. For example, a description of the history and qualifications of your agency will change only slightly each time you present it. If you are using a word processor, you can sometimes electronically cut these sections out of previous proposals and paste them into your new document. This will save time and hassle.

However, you will soon find (as have many others before you) that this solution is more difficult to implement than it at first appears. For one thing, you must always modify what you had previously written, even if only slightly, in order to achieve a better "fit" with the new funding source. For another, unless you have very carefully thought out your data storage strategies and which software you use, you will find that it is not always easy to find the exact passage of text you want.

But it is worth it to try. Here are some points to remember when developing a system for using this technology:

- Your word processor must be able to open and display at least two proposals simultaneously.
- When storing documents, you must develop a system for naming, archiving, and retrieving them that is sensible and easy to use.
- Storing all grant proposals on the same hard disk or removable hard disk, and using a search utility (such as GOfer, by Microlytics, available for both Macintosh and IBM compatibles), can help you to quickly locate text strings to work with.

- Keep each proposal developed by your agency in a file. The file should also include an envelope in which you store a floppy disk (two are better, in case one should fail). This floppy disk should contain all computer documents used during the development of the proposal (e.g. spreadsheets for developing budgets, graphs, correspondences, and so on). On the outside of the envelope list all software, including names and version numbers, used to create these documents.

Gather Intelligence on Your Funding Sources (Who, What, Why, When)

Each funding source has it's own idiosyncratic way of reviewing and evaluating grant proposals. It is helpful to have some understanding of exactly how they work. While this information is not always available, you should try to find answers to these questions:

- *Who* will be evaluating the proposal? What assumptions can you make about their expertise in the field?
- *What* is the process used for proposal evaluation? What evaluation criteria are to be used?
- Why was the RFP issued (or other funding made available) in the first place? Are there particular *program models* which are favorites of the funding source? Who wrote and who sponsored the legislation that allocated funds for this RFP, and why?
- This is basic, but has been ignored by otherwise good writers: When is the proposal due? It is an important question for the entire planning process for proposal development.

How do you gather this information? The four main sources are the originating legislation (for government funding), the RFP itself, the bidder's conference, and the proposal contact person or guidelines issued by philanthropic entities such as corporate grant programs and foundations. Read and re-read this information before deciding whether or not to respond to it. Attend the bidder's conference if there is even a slight chance that you will respond; and don't be shy about calling the agency contact (see below).

Work With Your Contact—Don't Hassle Them!

Every foundation, corporation, or government agency provides a contact person to whom you can speak about your proposal. It is often very helpful to telephone this contact and describe your concept to them before you begin actually writing a proposal. You may be told to scrap the idea, to find another fundor, or you may be given ideas and encouraged to incorporate them into your proposal to strengthen it. These responses are much more likely from private sources than from government agencies.

A contact in a government department may be under very specific instructions which, for a variety reasons, restrict what you can be told. You may feel tempted to aggressively demand certain points of information, such as (for example) whether a determination has already been made to give the funding to a certain provider, in which case the RFP will have been issued primarily to satisfy a departmental or legislative policy. Avoid doing so; you will only make your day and your contact's less pleasant, and you may alienate an important source of help.

Schedule Proposals Sequentially

If you know what proposals are coming down the pike, and when, you can plan your schedule in advance. Be practical; remember that writing a strong proposal takes more time than you think. If at all possible, schedule time off between proposal writing. A few days to catch up on other business, and a few days to take a short vacation, can do wonders for the quality of the next proposal you write.

Pick and Choose Your Targets—Success With A Few Is To Be Preferred Over Failure With All

If you have a clear strategic picture of where your agency is headed, you can evaluate potential grant sources more easily. The question to ask is simple: "Do these folks want to fund a program which we have decided to provide?" If the answer is no, don't write the proposal. Another source will come along soon; save your energy for that time.

You may also see RFP's which look like a good match for your agency, but which you have little chance of successfully competing for. Among these are the RFP's which have been issued as a formality. Usually these are issued to continue funding for an existing program. The authors of these RFP's are generally well-mannered enough to provide some clues. Watch for these warning signs:

- The RFP is much shorter than usual (5 pages compared to 50), and requires a shorter response (3 or 4 pages maximum, compared to 50 -100 pages maximum).
- The "Agency Qualifications" are much more specific, narrow-focused, and specialized than usual. In fact, they are describing a specific agency, and unless you are that agency, the requirements will not match.

The department contacts who answer questions about these RFP's cannot admit to you that the outcome is rigged. But you may as well call and ask. If you don't try to get a direct answer, you may be able to have a conversation in which enough will be said between the lines to warn you off.

Collaborate During Planning and Editing—Editorial Board

It is very helpful to begin a response to a RFP (or to begin development of an unsolicited proposal to another source) by forming a brainstorming committee. This committee can provide a range of perspectives which will help to develop a broad program outline, or to test and improve upon an existing idea. They can evaluate the content of early drafts of the proposal, and help to ensure that it is readable, logical, and sufficiently detailed. If they are carefully chosen, they can also help by contributing letters of support and in other, less tangible ways.

The board should focus on a clear description of the purpose of the project, the goals, and the specific objectives.

It is a good idea when working with such a board to make an agreement at the beginning about how their contributions will be used. I prefer to retain control over which ideas I incorporate and which I discard. By making sure that editorial board members clearly understand this, you can avoid later conflict and encourage more lively discussion and evaluation of ideas.

Create A Concept, Then Reality Check with a Budget

Once your editorial board has developed a concept, sit down with your financial officer and create a budget for your proposal. It should include enough funds to cover each activity for all objectives you will be proposing. This provides a reality check that, often as not, sends your original concept back for modification. Don't assume that this is negative; I have frequently been able to add new features to my proposals after discovering that the original versions would cost less than I had originally anticipated.

Budget Adequately For Your Proposed Activities—And Then Some

Proposal evaluation formulas issued by potential funding sources frequently include a provision to divide total score for narrative and scope of work by budget, or use some similar process which is intended to estimate *cost-effectiveness* of each proposal compared to others submitted. You may as a result be tempted to scrimp on some budget items in an effort to improve your score. Resist this temptation, just in case you get funded. One of our colleagues claims that actually getting funded is the worst part of proposal writing—because then you have to actually do the work. Well, doing the work means (hopefully) achieving your purpose. It should be a problem only when you have promised more than you can actually deliver within the budget you have set. Slim budgets are a frequent cause of this problem.

Be sure to show that you are going to pay staff adequately; this will help you to recruit adequate staff. Likewise, be sure to *carefully* plan for each expense and to research what *actual* costs will be to meet these expenses. Add a 10% safety factor and use this figure. When you are funded you will be glad you did.

A budget which is clearly inadequate will weaken your proposal, not strengthen it. Reviewers will wonder how you intend to accomplish your objectives, and will guess that you probably won't.

Have a Single Writer for the Full Proposal

A team may be needed for several stages of the proposal, but writing the actual narrative should almost always be done by a single individual. Your most talented writer should be assigned to this task. This will help to create internal consistency of content, style, and tone. It also helps clarify who is responsible for what—a recurring ambiguity when working with a team.

I find that when I write as part of team of writers, I work hard to respect their contributions. One outcome of this is that ideas which I think are poor get incorporated into the finished product. Inevitably, these proposals fail. As a writer working with a team I am partially a technician and partially an artist. As a technician, I must faithfully include the decisions made by others about program model.

When I write alone, I am much more an artist. As an artist, I am privileged to work with the manner in which ideas fit together, and to seize opportunities during the process of crafting the narrative to subtly strengthen each idea. This approach more frequently results in proposals that succeed.

Provide Cover for Your Writer

Your proposal writer will likely feel a great deal of pressure while writing a proposal. There may be a perception that the future of a program, or of the jobs of colleagues, ride on the outcome. There will certainly be a deadline looming, approaching only slightly slower than the speed of light. Taking care of your writer under these circumstances makes good business sense. Here a few things which you should do:

- Have a support team. Even if the team is only one person, having a "go-fer" to track down information and take care of miscellaneous tasks, such as copying and delivering working drafts to individuals who have agreed to be sources of feedback, can be a major boon to a proposal writer.

- Provide decent tools. If you have only one word processor in your agency, the proposal writer gets it for the duration of creating the proposal. If you have several computers, give a good one to your writer.

- The setting is important also. At a minimum, your writer needs an office which is not shared and which has a door that closes. I find that good background music helps also.

- Run interference with the rest of the world. A secretary can screen and redirect calls; a supervisor can assign other pressing work to other staff.

Research Your Topic

Frequently those who issue an RFP have a specific program model in mind. Find out what the model is and who is already doing it well. This may take some legwork, because for various reasons funding sources are not always at liberty to specifically identify a particular program or model. Ask around; this is one of the situations in which having a well-developed network among your colleagues can really bring good marketing benefits.

Once you have identified a specific agency or program that the RFP is modelled on, give that agency a call. If you are honest about your needs, most professionals are happy to share information about their program. This information may include research reports, operating objectives and activities, magazine and newspaper articles, original funding proposals, and even books based on the program. Gather these materials, and use them in your proposal. Quote from them, and include reference footnotes.

Another excellent strategy is to spend part of a day making a site visit and observing the program in action. Observe what aspects of the program really excite you, and what areas you think could be improved upon. When you write your proposal, write a program that makes sense to *you*, not a direct copy of what makes sense to somebody else. Creativity (within reasonable bounds) is respected by most proposal evaluators.

Use Language Thoughtfully (Readable, Include Required Lingo, Define Your Terms).

Avoid jargon as much as possible. Reading an RFP has a certain hypnotic effect, because most authors of RFP's liberally incorporate jargon, so it is a natural tendency to reply with similar language. Avoid the temptation; write in clear, understandable terms. The author of the RFP will not necessarily be the reviewer of your proposal. Rarely are proposal reviewers knowledgeable about the technical nature of the services and activities you propose, so your jargon may only be so much gobbledegook to them.

Now, to contradict this rule, you must also know which jargon to stick to, and stick to it religiously. For example it has become important in recent years to use the term, "problems related to alcohol and other drugs" rather than the once-acceptable but now forbidden, "substance abuse." There are sound linguistic and philosophical reasons for this change in language, but that is not the point. The point is that you must use language which will speak clearly to your reader without causing alienation.

This language is continually evolving, along with the field. For example, in early 1989 the California Department of Alcohol and Drug Programs issued an RFP to provide services to "Children of Alcoholics." When we wrote our proposal we stuck to using the term "children of alcoholics," but doing so created a great deal of friction between our agency and potential collaborators. Some refused to write letters of support because, in their view, use of this label created a pseudo-diagnostic category which could eventually stigmatize millions of children. Our proposal was funded, and the first thing ADP required was that it be rewritten to delete the term, "children of alcoholics." Awareness of and responsiveness to this continuing development of language is an important task for a grant writer.

Another important principle is to define your terms. It is a mistake to assume that it is safe to use a specialized technical term, such as "family systems therapy," without explanation. Even if the proposal reviewers understand the term (which is by no means guaranteed) they want to know that the writer understands it also.

This can be done with an appendix containing definitions, but I think that this is an awkward solution. I prefer to define the terms either in the proposal narrative, or in footnotes on the same page where the term is first used.

Follow the Outline

RFP's are usually structured in outline form. It is essential that you follow the outline as it is given. This can be frustrating, because sometimes these outlines do not seem to follow a logical order. They can also be redundant, asking for identical information in two, three, or four different sections. Do not let these circumstances divert you from the One True Path—the outline.

If the outline is redundant, restate your point from another angle, or with different words. You can try providing different examples to illustrate the same point. While it may seem easier for you to refer the reader to a previous section, doing so may result in frustrating the reviewer, who is forced to flip back several pages and re-read your information.

When I am past the conceptual stage of proposal writing and ready for the hard work of putting it into words on paper, the first thing I do is create an outline on my word processor. The outline follows precisely the headings and numbering system given in the RFP—even when they seem nonsensical. This helps proposal reviewers to know which part of the RFP a given section of proposal is responding to.

Be Responsive—And Respond Carefully To Every Item

Be sure to propose a program that the RFP or other funding source is asking for. It is rarely worthwhile to be *too* creative in responding to a government RFP, even when the RFP specifically asks for innovation. An RFP recently issued by the Office of Child Abuse Prevention (California Department of Social Services) encouraged respondents to be innovative, then proceeded to rigorously outline the specifics of the program it would fund. One warning given to writers was that the proposal would automatically be rejected for "non-responsiveness."

Being responsive also means addressing *each and every* item in the RFP, and doing so well. This can be difficult when you are physically, emotionally, or mentally exhausted; the temptation to do a token job on an "unimportant" section becomes very great. Remember this: *there are no unimportant pieces of a proposal.* An otherwise excellent proposal may fail because the writer lacked the stamina to craft one small section as carefully as the other sections were crafted.

This is one of the reasons why it is essential that a proposal writer take good care of his or her personal needs.

Strength, Not Length (Keep Within Limits)

While responsiveness is important, it is also important to be as concise as possible. Sometimes a concise answer requires considerable detail; other times the requirement is for a simple, straightforward narrative with one or two supporting examples.

Give Charming Details, But Don't Ramble On (and on, and on, and...)

The difference between a charming detail and a boring detail is that the first is of real interest to the reader; the second is of interest to almost nobody. For example, in one proposal for a prevention curriculum at continuation high schools, I mentioned that presentations would be given during the period just before lunch. The presenters would then have sack lunches in the quad areas where the students congregate. This would give students an opportunity to ask questions in an informal setting.

Is this a detail which will interest the reader? My bet was that it would be. On the other hand, I didn't want to belabor the point, so it was stated in the proposal very much as presented above. A good idea can weaken your proposal if you bore your reviewers with it.

Educate Your Reviewer

It is not safe to assume that proposal reviewers are up-to-date about what the trends are in the field. In alcohol and other drug problem prevention, there is a persistent tendency even among professionals to remain stuck in the discredited "information model." If you are proposing a program based on a more sophisticated model, you will need to provide a rationale for this model to the proposal reviewers.

Write your rationale carefully, and use sound logical arguments. Quote authorities, and include references and a bibliography. A proposal really works when the reviewer feels that they personally benefitted from reading your proposal by gaining new knowledge.

Rewrite Your Proposal Until Anybody Can Understand It Easily

It can be surprisingly easy to slip into using, instead of English, "bureaucratese" when writing a proposal. The language used in many RFP's exerts a strong hypnotic influence to do so. Build in a safety valve to protect yourself from this habit. For several years, I had a "secret weapon" who helped me to avoid this error. Her name was Vicki, and she worked as a bookkeeper in the fiscal department of my agency. Vicki has many virtues, including giving direct and honest feedback, but a grasp of technical language is not among them. I gave her a copy of any proposal I wrote before making a final draft. If the language and concepts made sense to Vicki, I knew it was OK. If not, I rewrote it and kept rewriting it until it passed her inspection. The majority of these proposals were successful.

Every proposal writer should search out a similar secret weapon. Remember this lesson of Confucius: "In language, clarity is everything."

Provide A Summary, Whether It's Asked For Or Not (Unless It Is Specifically Forbidden)

The first exposure that a reviewer has to a proposal is critical. It should have impact, make sense, and tell briefly what is being proposed, why, what it will cost, and what benefits it will bring to the community. All this information should be included in the summary.

Although the summary is the first thing reviewed, it is the last part of the proposal to be written. It is kept to one or two paragraphs, and follows, in highly condensed form, the content of the actual proposal. Government RFP's do not usually require summaries; instead they require a cover sheet that contains some of the same information that a summary would normally contain. The closest thing to a real summary in some government RFP's is the "scope of work," which details goals, objectives, and timelines for the proposed project. Nevertheless, I *always* write a proposal summary (or abstract), whether the RFP requires one or not. The summary contains the following elements:

- What the problem is, and why it exists;
- What solutions are proposed;
- Who will be providing the proposed services;
- Who will benefit from them, and how;
- The time frame for program start-up, delivery, and evaluation;
- The amount of funding requested;
- The total project budget, naming other funding sources and amounts.

Compose Reader-Friendly Copy (Use Desktop Publishing Technology; Subheads, Graphics)

A proposal is strengthened if it is "reader-friendly." This means that you have paid attention not just to the language and concepts, but to how the document itself is *designed* and *presented.* The new technology of desktop publishing has given proposal writers an unprecedented degree of control over not just what is written, but how it is presented. The subtleties of graphic design are far too complex to detail in this manual, but they can no longer be ignored by proposal writers. Among your competitors are those who have learned how to use these tools to dramatically improve the presentation of their proposals.

Here is a list of a few of the important concepts related to desktop publishing technology. We suggest you research these further, and have provided a list of resources to help you do so in the appendices.

- **Typeface:** The typeface you use has a big impact on how readable your document is. A poor choice is exhausting to read and discourages your reviewer. Recommended: Times Roman is always a safe choice. This manual uses Adobe Garamond throughout, with a couple of examples in Lucida.
- **Subheadings**: For the proposal outline, and for additional subheads that you create, it can help to use a contrasting typeface to that used in the body copy. Recommended: Helvetica is good choice, and balances nicely with Times Roman.
- **Alignment**: Don't justify your text. A ragged right margin is much easier to read than a justified margin.
- **Graphics**: Appropriate use of graphs and diagrams can strengthen your proposal. What is "appropriate?" When a graph or diagram makes a concept easier to understand than narrative would, use it. Do not use graphics gratuitously or as an effort to mask the lack of real content in a poorly written proposal.
- **Headers and Footers:** A nicely designed header can incorporate your logo and the proposal title. Footers should always include page numbers.

Maintain Your Energy (Avoid Shortcutting)

The grantwriter who is struggling to meet deadlines can easily fall into a pattern of working 12, 14, even 16 hours a day. The inevitable cost of doing so is a loss in energy. This affects grant proposals by resulting in poor concentration and sloppy and incomplete writing. Efficiency deteriorates by any measure, but especially in success rate. It is important for grant writers to take care of themselves. Administrators who supervise grant writers should learn to provide the flexibility to help them do so. A few suggestions:

- Tolerate an odd-hours working schedule; the most productive levels of creativity sometimes follow a schedule other than 8 to 5. If a writer doesn't become creative until 2:00 p.m., consider allowing a 1:30 p.m.—9:30 p.m. work schedule, with mornings off.
- Consider offering a conditional health club membership: the agency will pay, but the employee must agree to use it for a negotiated number of hours per week.
- When a proposal requires a couple of intensive weeks of work, find an assignment of a totally different type, which will require a few days to complete and which can follow writing the proposal. This shift of focus can be almost as refreshing as a vacation.

Remember: Successful Proposals Merely Open Negotiations

Once your proposal has been accepted for funding, many funding sources will require extensive negotiations. The program you proposed will most likely receive some changes, ranging from cosmetic details to wholesale restructuring. Negotiations usually focus on documentation and fiscal procedures. The agency representative who negotiates with the funding agency should be the person who is going to direct the services funded. The grant writer should not be given this task, unless the grant writer is also the program director.

Appeal

Most government agencies include an appeal process whereby you can request that your proposal be reconsidered after it has initially been rejected. Appeals can be a very helpful part of your overall grant development strategy. They provide you with information about the weaknesses of your proposal, which can then be used to strengthen your next submission. Once in a great while, they result in funding for previously rejected proposals, but this is rare.

Ask For Feedback

Always ask for copies of the comments of reviewers, whether your proposal was successful or not. These comments can provide a wealth of information on how you can strengthen future proposals. Some agencies hesitate to provide actual written comments, but if the funding source is a government agency these documents are legally public information and you have the right to see them. However, the agency is not legally bound to take the trouble of looking them up, copying and mailing them to you, so you may need to make other arrangements to secure a copy. Good relationships with agency staff are a real help, so remember – avoid hassling them.

Summary

Solid proposal writing skills are only part of the equation when you are seeking funding through grants. In addition to having an ace writer on board, the agency must be well managed and be able to communicate a strong, vital image of the benefits of it's services. One aspect of management for successful proposals is effectively managing the process of proposal writing. Inseparable from this process is learning how best to use the unique talents of a good grant writer; and, when you are lucky enough to have a real proposal artist working with you, how to respect the idiosyncratic needs that such an artist invariably has.

Appendix A
Rating Sheets for 100 Tactics

On the next two pages are *rating sheets* which list the tactics described in Chapter Three. Use these as you read chapter three to note your reaction to each tactic. Give the highest rating to those that you think are best for your program.

Later, when you work through Chapter Four (Creating a Strategic Marketing Campaign) you can refer back to these rating sheets to remind you of which tactics are available, and which you prefer to use in your campaign.

Appendices

Appendix B
Strategic and Tactical Planning Forms

The use of these forms is described in Chapter Four. The Strategic (long–range) Planning Form is used to help chart out a vision for the next five years or so. The Tactical (short–range) Planning Form is used to convert the Strategic Plan into immediate, practical actions for the next year. Examples of completed forms may be found in Chapter Four.

Strategic Planning Form

Agency:__________________ **Date:**________

Goal:					Service or Product:		
19__/__	19__/__	19__/__	19__/__	19__/__	19__/__	19__/__	
							Segmentation
							Packaging

Technical Assistance Associates

One-Year Tactical Marketing Plan

Agency:____________________ Date:__________

Service or Product:	Marketing Objective:

Tactic	Month/Year											

Appendix C

Resources

Resources

Books

General Marketing:

Kiritz, Norton J.: *Program Planning and Proposal Writing - Expanded Version*. The Grantsmanship Center, Los Angeles, 1980. The single indispensable resource for grantwriters.

Lant, Jeffrey: *The Unabashed Self-Promoter's Guide*. Jeffrey Lant Associates, Inc., 50 Follen Street, Suite 507, Cambridge, MA 12138, 1983. Very practical, step-by-step advice on a wide variety of marketing tactics, including media contacts. Also by the same author: *Money Talks: The Complete Guide to Creating a Profitable Workshop or Seminar in Any Field.*

Levinson, Jay Conrad: *Guerilla Marketing Attack*. Houghton Mifflin, Boston, 1989. Practical advice, lively reading. We loved it.

Lovelock, Christopher H, & Weinberg, Charles B.: *Public and Nonprofit Marketing, 2nd Edition*. The Scientific Press, Redwood City, CA, 1989. When writing this manual we reviewed several textbooks for marketing nonprofits. Most were unreadable and/or irrelevant. This one is the exception. It is thorough, practical, readable, and an excellent foundation for marketing education.

McCormack, Mark H.: *What They Don't Teach You At Harvard Business School—Notes From A Street Smart Executive.* Bantam Books, New York, 1984. A successful entrepreneur shares his favorite strategies.

Public Interest Public Relations Inc.: *Promoting Issues and Ideas — A Guide to Public Relations for Nonprofit Organizations.* The Foundation Center, New York, 1987. Well written and practical information for handling media, advertising, and public relations.

Skloot, Edward (Editor): *The Nonprofit Entrepreneur—Creating Ventures To Earn Income.* The Foundation Center, New York, 1988. A useful collection of concise articles. The one by Lovelock & Weinberg is a good introduction to their text, *Public and Nonprofit Marketing* (listed in this section).

U.S. Department of Health and Human Services: *Making Health Communications Program Work: A Planner's Guide.* NIH Publication No. 89–1493, April 1989. A curious combination of excellent information about marketing communications packaged so artistically that it is difficult to read. However, it is worth the effort, and we recommend it. Single copies available for free from National Clearinghouse for Alcohol and Drug Information, P.O. Box 2345, Rockville MD, 20852.

Design:

Beach, Mark: *Editing Your Newsletter—How to Produce an Effective Publication Using Traditional Tools and Computers.* Coast to Coast Books, Portland, OR, 1988. Everything you need to know about making a newsletter (except how to write!)

Parker, Roger C.: *Looking Good In Print - A Guide to Basic Design For Desktop Publishing.* Ventana Press, Inc., Chapel Hill NC, 1988. Concise, clear, great examples. A good beginner's course in graphic design of brochures, newsletters, letterhead, and so on.

Periodicals

General Marketing and Program Management:

The Whole Nonprofit Catalog. Published semi-annually by The Grantsmanship Center, P.O. Box 6210, Los Angeles, CA 90014 Here's a marketing question for you: how do you get an audience which is deluged with junk mail to read your catalog? Answer: combine it with informative, witty, practical, and incisive articles that are immediately useful to your readers.

Training: The Magazine of Human Resources Development. Published monthly by Lakewood Publishing Inc., 50 South Ninth Street, Minneapolis MN 55402.

The NonProfit Times. Published 12 times per year by Davis Information Group, P.O. Box 408, Hopewell, New Jersey 08525–0408. Subscriptions free to qualified individuals; otherwise $39 annually. This is an outstanding publication that very specifically focuses on marketing non–profits. Each issue has interviews, demographics, and basic information to aid marketing decisions.

Nonprofit World—The National Nonprofit Leadership and Management Journal. Published bimonthly by The Society For Nonprofit Organizations, 6314 Odana Road, Suite 1, Madison WI 53719. A solid, no-nonsense journal for nonprofit managers which regularly features articles related to marketing nonprofits.

Design:

Before & After–How to Design Cool Stuff. Published by PageLab, 331 K Street, Suite 150, Sacramento, CA 95814–9671. Subscription rate $60 per year, 12 issues. If you use desktop publishing technology, this is for you. It is an outstanding example of aesthetically combining art and information, and each issue teaches the reader how to achieve the effects demonstrated.

Desktop—The Business Communicator's Competitive Edge. Published bimonthly by International Typeface Corporation, 2 Hammarskjold Plaza, N.Y., NY 10017 212/371-0699. Covers desktop desigr. and publishing. This one is very oriented to "how-to" articles. It is also and excellent example of a major marketing strategy implemented by ITC, which has huge stakes in the development of desktop publishing.

HOW—Ideas and Techniques In Graphic Design. Published bimonthly by F & W Publications, Inc., 1507 Dana Ave., Cincinnati, OH 45207; 513 531-2222. Very practical ideas for sophisticated and effective graphic design, office design, and so on. It is beautifully produced and a visual treat.

Resource Centers/Catalogs

The Foundation Center, 79 Fifth Avenue, New York, NY 10003 (212) 620-4230. California Field Office: 312 Sutter Street, San Francisco, CA 94108 (415) 397-0902. Produces state-of-the-art materials for identifying potential grant sources. The publications produced by The Foundation Center can provide valuable information for increasing your chances of success as a grant proposal writer.

The Grantsmanship Center, P.O. Box 6210, Los Angeles, CA 90014 Outstanding training resource for grant writing, fund raising, and nonprofit management. Excellent publications available at a nominal cost, many of which are about marketing and all of which are about succeeding as a nonprofit organization.

The Nonprofit Organizations' Resource Center. 6314 Odana Road, Suite 1, Madison WI 53719, 609/274-9777. A mail-order bookstore with about 500 titles related to management and marketing of nonprofit organizations.

TECHNICAL ASSISTANCE ASSOCIATES

Technical Assistance Associates

Mission

To help helping agencies help better.

Philosophy

Human services organizations are becoming more effective by:

- planning strategically;
- developing staff;
- incorporating new technologies;
- basing service delivery models on research findings.

Associate Consultants with TAA include some of the most respected people in prevention. We link program managers and agency executives with the experts who can help them to formulate the challenges facing their organizations and mount an effective response.

Services

- Strategic Planning—Mission statements, goals, objectives, operational procedures, and evaluation.
- Product Development—Manuals, visual aids, curricula, periodicals, product design and testing.
- Marketing—Strategic communications and marketing strategies.
- Grant writing and funding development.
- Staff development: training and retreats.

How to Get in Touch With Us

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