



Wisconsin Institute for Healthy Aging

Marketing Tool Kit

Support for WIHA Program Providers
and Leaders to engage their communities in
health promotion and fill workshops.

Introduction

As a Program Provider or trained Leader, you know the incredible impact that health promotion programs have on participants' lives. Each program gives people confidence, helps them feel better, and allows them to do the things they want to do in life. Thank you for helping to share this program with others!

Once you have a workshop scheduled in your community, the next step is recruiting participants! The tips and advice in this kit will help you fill your workshop, whether it is your first... or 31st!

If there's one idea that you take from this tool kit, it's this:

Be prepared to spend as much time promoting your workshop as you do planning it (if not more!). Participant recruitment needs to be done on a consistent and ongoing basis.

This tool kit will give you a variety of marketing strategies to help you recruit participants. We recognize that each community is different and has different assets that make some marketing strategies work better than others. You may find that you need to try several different strategies before hitting on those that work best in your area. Don't get discouraged if something you try doesn't work or doesn't work right away.

If a workshop isn't filling despite your best efforts, contact WIHA preferably 1-2 weeks before your workshop start date! Don't cancel until you've had a conversation with us. We'll help you identify ways and places to recruit that you haven't tried yet.

Finally, thanks for all you do to support the good health of people in your community. Promoting your workshops is a key component in your success and we're here to help, so be sure to contact us if you run into challenges.



Getting Started

Start by working with your local **Implementation Team** which will consist of Leaders, the Program Provider, and others in the community who are all invested in the success of the workshop. They will be a great resource to help strengthen the knowledge and connections you need to be successful.

Good candidates for the outreach component of the Implementation Team are 1) people who are passionate about the program, 2) people who work or volunteer for organizations that also serve the target audience you want to engage and who are committed to providing health promotion support, 3) people who have other strong community contacts and can help with program promotion.

Be sure to begin discussions and planning for promoting your workshop early on giving you plenty of time to engage potential participants.



Recruiting Participants: The Basics

Promote Your Program – Promote Your Workshop

There's a big difference between building general awareness of your program and promoting a specific workshop. Both are important, but you'll likely use some different strategies to accomplish your goals. It's important to be very clear about your specific goal (i.e., building general awareness of your program or filling a specific workshop) before deciding what strategies you'll use.

Think Audience

Who are your target audiences for this program? Where do they live and congregate? What do they care about? How do they get their information? Based on your answers to these questions, plan your messages and communication strategies. WIHA has created materials that you can use or adapt with messages that have resonated with program participants to save you time and effort.

> WIHA's website – wihealtyaging.org - has all of these materials located in the Program Resources section for your program under PROMOTING YOUR WORKSHOP.

Develop Relationships in Your Community and Build Your Infrastructure

Many of these people will be part of your Implementation Team, but there may also be other community leaders that may be able to help based on their specific location or population they serve. Relationships with key organizations are critical to creating robust communication and referral channels.

- Systematize your program outreach. Develop a plan, evaluate after each workshop outreach effort, and replicate those methods that are successful.
- Reach out early to agencies and organizations – non-profit, religious, aging, educational, and public health - and leaders who also serve your target audiences and can help you reach their constituents or members.
- Find out more about the connections that your local partners already have. Ask them to introduce you as someone who can help their members (e.g., the Aging & Disability Resource Center may already have contacts with several community entities).

Get Your Message Out Early and Often

Don't wait. Start getting the word out **at least eight weeks in advance of the workshop.**

- Help to preview the program and attract "the most interested" with face-to-face presentations to groups in your target audience. Be sure to collect audience names and contact information (email and/or phone numbers) to thank them for listening and to continue a conversation about their interest in the program.
- Seek out participant "champions" who can tell their peers about the program and encourage potential participants to register.

- Use regular announcements in event listings in local newspapers as a complement to the awareness generated by face-to-face presentations and meetings.
- Create a list or database and enter the name and contact information of each person who calls or looks for information about a workshop. Keep building this list and keep sending messages to individuals on the list by phone, email, or mail. These are your best prospects.
- Market your program all year around to continue building awareness and demand. Studies show that individuals must hear a message at least 7 times before they take action so it's important to continue to engage people regularly.
- Capitalize on other local, state, or national awareness campaigns or even news stories related to your program or the health concern your program addresses. You may be able to get local media attention for your program when it relates to another news story or event.

Don't be afraid to try things – see what works, and what doesn't – then evaluate and adjust. Every community is different and has different assets so if one promotion method doesn't work well, try another. Also, in addition to thinking about WHAT you are doing to promote your program, consider HOW you are doing it.



Face-to-Face Presentations

Giving face-to-face presentations to potential participants is an essential marketing strategy to generate initial awareness about a program. Tailoring your message during these presentations will help catch your audience's attention and allow them to relate to your key points.

“Elevator Speeches”

An “elevator speech” is a succinct description of the workshop that can be delivered in the time it takes for an elevator ride – about 30 seconds. It should be brief (100 – 130 words) and contain a clear message. It can be useful in promoting your workshop, especially on the first or “cold” call to a potential partner or during a short encounter with a potential participant. Elevator speeches can be used in combination with material handouts, like a brochure, flyer, or poster.

> Find an ELEVATOR SPEECH TEMPLATE on WIHA’s website – wihealthyaging.org - in the Program Resources section for your program under PROMOTING YOUR WORKSHOP.

Community Presentations

This presentation emphasizes the personal story of someone who took and benefited from taking a workshop. A workshop Leader and/or past participant make the best presenters. Once invited as a guest speaker at an event or meeting where your target audience is in attendance (e.g., senior housing residence, civic club, senior dining site, faith-based group), you can adapt the presentation to both the audience and your allotted time slot. This type of presentation is most effective when your workshop is scheduled in the upcoming 2-4 weeks.

The main objective of this presentation is to inspire people to sign up for the program. In addition to learning about the structure and benefits of the program, the audience should feel connected to the speaker and energized to learn more about, and ultimately sign up for, the workshop.

Tips for presenters:

- **Personal experience or a compelling story.** To get the audience's attention, the presenter should be able to relate their own experience with the health problem or injury addressed by the program or tell about the experience of someone else. The audience should be able to relate to their story in some way.
- **Enthusiasm.** The presenter should be passionate about the program and be able to convey this in his or her presentation.
- **Experience with Self-Management.** The presenter needs a sound understanding of what it means to self-manage, and how it can help better one's life.
- **Community Involvement.** The best ambassadors are those with previous experience working with groups and engaging community members.
- **Availability.** An ambassador should be able to devote a few hours a week to outreach events and talks, especially in the 2-4 weeks prior to a scheduled workshop.

Examples:

<http://www.youtube.com/watch?v=CujTuDFdaEw>

http://www.youtube.com/watch?v=WHpB4PlpHas&feature=watch_response

“Session Zero” Presentation

Problems with participant recruitment and retention are often attributed to participants' not understanding what a workshop is about and how it can benefit them. The main objective of the “Session Zero” presentation is to give your target audience a real taste of what the program is all about and to recruit participants for the actual workshop.

The entire Session Zero presentation lasts one hour and is a “sample” of what they will experience in the workshop. You can choose to use just one or two activities depending on the time allotted for your presentation. It can be scheduled with organized groups or communities, such as support groups, retirement facilities, faith-based organizations, or other settings where groups already meet at a designated time. Additionally, presentations can be scheduled with “drop-in” attendance, open to a specified group of people (e.g., residents at a senior housing facility) or the general public.

Another way to use Session Zero presentations is in educating other aging and health professionals (such as Aging & Disability Resource Center (ADRC) staff members, nurse practitioners, or a group of pharmacists) about how the program works, its proven outcomes, and the benefits to both the participant and the referrer. The goal is to gain their assistance in promoting the workshop by recommending it to their clients.



Outreach Through Community & Partner Organizations

Working together with partner organization is a great way to maximize the reach of your program marketing efforts. Be sure to plan ahead – way ahead in some cases – to ensure there is time to fit your announcement or promotion into their other communication efforts. Here are some ideas for promoting your program:

- Contact local agencies that put out a community newsletter (e.g., a quarterly hospital newsletter, ADRC monthly newsletter). Find out what kind of articles they include and if they would be willing to run a notice about your upcoming workshops.
- Include an announcement in your partner organizations' publications, as well as community newspapers, radio, senior magazines, etc.
- Place brochures and/or put-up flyers on community boards in activity centers, senior centers, fitness centers, wellness centers, laundromats, and health food or product centers.
- Ask local grocery stores or food banks to put flyers in grocery bags during a designated time period before an upcoming workshop.
- Send an email to your entire organization and partner organization to get the word out about an upcoming workshop.
- Create a call-to-action announcement for area partners to distribute via their email distribution lists or social media channels. Make sure it's an easy ask – a ready-produced announcement that they can simply distribute.
- Have a table at a health fair or other community event where you're likely to engage your target audience. Try to have a means of engaging people such as a question or poll about what people are doing for their health. Make it fun!

Word-of-Mouth Referrals

Some of the best marketing strategies focus on encouraging current or past participants to help create a person-to-person or “word-of-mouth” referral (or recommendations) program. Here are some ideas on how to engage your participants to help spread the word about your workshop.



“Tell a Friend” Referral Card

For use at your last session. Ask participants to help you promote your next workshop by sharing a Refer a Friend card with someone who may also enjoy and benefit from taking a program.

> Find Referral Cards on the WIHA website – wihealthyaging.org – in the Program Resources section under PROMOTING YOUR WORKSHOP.

- Give participants several cards during a session or at the program’s last session. On the card include information about where to find out about future workshops.
- Don’t have a workshop planned for awhile? Consider asking participants to send a letter to their doctor telling the doctor how much they benefitted from the workshop.

Getting a Picture or Testimonial

Ask for a testimonial and/or picture from your participants at the end of the workshop. These are useful when advertising your next workshop. You might also get a group photo of the class which could be used for program promotion and participants might like to get an electronic copy following the workshop.

It is important to get written permission from each individual in your photos if you intend to use them for program promotion. WIHA has a sample image release form you can use (see below).

Ask participants for feedback on how the workshop has affected their lives. You might also consider sending requests for testimonials to them after the workshop, so they have more time to think about their answers.

If participants approach you with positive feedback, take that opportunity to ask them to provide a testimonial. Or write down what they say and get permission to use it. Testimonials can also be captured in a simple exit evaluation. Ask if you can use their first name or initials. Otherwise use “past participant.”

> Find an IMAGE RELEASE form on the WIHA website – wihealthyaging.org – in the Program Resources section under PROMOTING YOUR WORKSHOP.

Volunteer Ambassadors

Consider inviting past participants to volunteer to conduct word-of-mouth marketing efforts in the community. (See “Face-to-face presentations.”) Also, ask participants if they belong to civic clubs, hobby or interest groups, senior centers, churches, or other organizations that might be interested in having a Program Provider or workshop Leader speak about their program. Ask them to join you at the presentation and provide a testimonial.



Referrals from Health Care Providers

Referrals from Health Care Providers

One of the single most effective ways proven to recruit participants is through their health care providers. People are more than 18 times likely to take a self-management workshop if it is recommended to them by a health care professional. Engaging health care providers can be a challenging process but keep at it because it can help to consistently fill workshops in your area. There are several key parts in creating a cooperative relationship:

- Getting in the door. How do you reach health care providers and interest them in a program?
- Explaining the program in a way that resonates with health professionals and meets their needs.
- Creating a referral/recommendation system. Once convinced and ready to recommend to their patients, how do you create a system that is easy, automatic, and integrates into the workflow of the health care provider?
- Following up. How do you confirm to the provider that their recommendation to a patient is effective in the patient registering for, and ultimately benefiting from, the workshop?

Getting in the Door of the Health Care Provider

1) Research the health care provider

Identify who can do the outreach, which upcoming workshop(s) you are promoting, and what provider groups are nearby. Strategize on who will do the personal contacts with providers and other follow-up tasks (e.g., phone calls, mailings).

Know the provider's mission and vision. Most are committed to preventive care and community wellness through education. Be prepared to speak to how a specific program can support their mission with the challenges their patients face.

Investigate how the provider engages in education to their patients. Keep this in mind as you prepare referral materials for the provider to give to their patient. Many WIHA programs are proven to complement the advice of their doctor or clinician. Activating a person to be more responsive to their care plan can enhance the patient-provider relationship.

2) Be prepared to explain the program

Many health care providers have not heard of your program and will first need an introduction to what the program is, where it was developed, what its evidence-based outcomes are, where it is available in the community, and who is teaching the workshops before they begin to recommend it to their patients.

3.) Know your potential key contacts.

The best approach to get in the door of a health care provider is to identify a champion. The champion should be passionate about the workshop and be able to share that passion with others. The champion can be anyone in the practice who believes in the program and can dedicate some time to making it a success. Champions have been physicians, physician assistants, nurses, care managers, social workers, or health educators, etc.

If you are already working with your hospital, ask your contact who might be the best person for a conversation about broader involvement with the program and request an introduction. In larger hospitals, the managers of disease-specific programs such as diabetes clinics and cardiac or pulmonary rehabilitation could be helpful contacts. In smaller hospitals, these functions may be grouped together into a single health education unit. Discharge planners and employee wellness coordinators could also be good contacts. Within hospital administration, supporters may be found in the marketing department, community benefits office, volunteer office, chaplain's office, or charitable foundation.

4) Contact a provider and follow-up, follow-up, follow-up.

Sending an informational letter to your potential contacts may be a good first step in building a relationship. Based on the clinic you're working with, consider addressing the letter to the office manager or administrator, who could bring it to the attention of providers as well as front desk and other staff members. Because clinics are very busy and receive a lot of mail, consider dropping off the letter by hand and following up by phone or in person. Also consider asking current participants to send a letter to their physician with a cover letter that explains the program. This could also be a good way to introduce the program to providers.

Face-to-face presentations and personal contacts are ultimately, the critical outreach strategies to use. It takes time to get your foot in the door and meet with a provider, but consistent and ongoing outreach will help you get there. Here are some tips:

Set-up a personal visit.

- Phone or drop-in to request an appointment.
- Meet providers at their convenience.
- Ask to schedule a short meeting for a presentation with your contacts (e.g., during lunch break, over breakfast).
- Ask to conduct a presentation at one of their meetings or conferences (e.g., Nurse Practitioners' monthly meeting).

Be flexible in your approach

- Two-minute hallway conversation or 15-minute staff meeting presentation – be prepared for either! And be appreciative of their time, even when the 30 minutes you had expected and planned for turns out to be just the 2 minutes in the hallway. Your goal in that first encounter is simply to be able to have a second one. You are developing a relationship. It takes time.

Keep it simple and be prepared.

- Have research on program facts and efficacy readily available.
- Be prepared to offer ways the provider can easily recommend the program (e.g., prescription pad, recommendation forms, brochures)

Track outreach contacts

Combine in-person visits with repeated follow-up (e.g., more brochures and flyers, phone calls, email, letters).

Creating a Health Care Provider Referral System

Once health care providers are convinced and ready to recommend the program, it will be important to help create a recommendation system that is easy, automatic, and integrated into the organization's regular workflow. Be prepared to know what you can potentially offer the practice to make this happen. The following are a few ideas of how to do this:

- Offer your own registration contact information or you can provide WIHA's Online Referral link along with your workshop ID number(s) allowing them to directly register or refer an individual into a program.
- Leave providers with brochures and flyers to hand out to their patients. This is a good start to ease providers in to recommending the program.
- Work with a health care provider for targeted outreach. If your champion is a physician or nurse practitioner, consider working with them to utilize electronic medical records and send personalized letters to patients diagnosed with one or more chronic conditions. The letter can introduce the program and encourages the patient to consider enrolling in an upcoming workshop. A letter template can be drafted in the provider's name and voice with his or her approval, then quickly and easily personalized through a mail merge and sent to each patient's home.
- Make it a department challenge/competition. Ask staff to refer 5 members to your upcoming program.

Following Up

Health care providers are more likely to provide ongoing recommendations to the program when they are notified that their patient actually took the workshop and benefited from it in some way due to the provider's recommendation.

Ask participants to send a letter to their provider at the end of the workshop to inform the provider what impact the workshop had.

Track recommendations from participants and call to thank the provider for frequent recommendations.

Reminder: If a workshop isn't filling despite your best efforts, contact WIHA right away - preferably 1-2 weeks before your workshop start date! We'll help you identify ways and places to recruit that you haven't tried yet.

Marketing in the Media

Media Sources

Newspapers – Daily, Weekly, Periodical, Internet

Radio – Commercial, Community Access

Television – Commercial, Community Access

Social – Facebook, Twitter, Instagram, Snapchat, etc.



Capitalizing on all of your local media opportunities can be a great way to promote your program. Think about the media sources that your target audiences interact with most and concentrate your efforts on those. Develop a list of key media outlets in your area – TV, radio, and newspapers – particularly those that have a significant readership/viewership that matches your target audience.

Promoting a Workshop

Paid Advertising

If you have the resources, purchasing ad space can both help you promote an upcoming workshop and build general awareness of your program. Contact the paper's display advertising department for rates and see WIHA's Posters/Ads section of your **Promoting Your Workshop** for design and messaging samples that can be customized and used or adapted to your needs.

Community Calendar

Calendar listings in local media outlets may be helpful for promoting a workshop.

Each media outlet has its own process for submitting calendar information. Scan the website first to see if it lists "Events." Next, click on "Contact Us." Often, the email address for submissions will be listed here. If not, you can send an email to the general email address with "Calendar/Event Listing" in the subject line. Most outlets have guidelines for submitting calendar listings.

Common information includes:

- Engaging headline
- Brief description of the workshop
- Date, day of week, and time of event – include location but be prepared for drop-ins
- Website for more information
- Registration information and cost

Press Release

The following steps are an overview of how to "pitch" a story to your local news media – newspaper, radio, and television. You can find a sample press release on the WIHA website.

- **Customize the release.** Use a compelling headline and keep pertinent information in the first paragraph. Add information that is specific to your county. Gather quotes from participants.

- Make a list of possible people to send your release to, including key contacts from local newspapers, magazines, television stations, radio stations, and trade and newsletter publications. Identify editors and reporters who would be most interested in what you have to say. Find specific names and departments; call ahead if necessary to find this information. Sending it to a specific journalist or editor will ensure a better chance of receiving prompt attention.
- Research media outlets to find out whether your specific contacts prefer to receive news releases by fax, mail, or e-mail. Prepare your press release submission in the necessary hard-copy or electronic format.
- Send electronic releases with interesting and to-the-point subject lines. Send to one person at a time or blind carbon copy (BCC) recipients to make the news release submission more personal. Type or paste the wording directly into the body of the e-mail; many journalists delete e-mails with attachments as they take too much time and often carry viruses.
- Follow up with a phone call. Ask if the recipient has received the release and let him or her know you are available for interviews or to provide more information. Emphasize the importance of this story to the media's audience and offer some good stories to tell. For example:
 - Personality Profile: Identify a local leader who is passionate about the workshop and has experienced benefits firsthand.
 - Health Information: Keep an eye on the media and watch for articles that are relevant to the program. Use these as a hook for sharing your information. For example, if a national study is published about the benefits exercise has on a chronic condition, use this to show the national, big-picture trend and provide information about how the Living Well workshop can help participants learn more about and develop plans to increase exercise.

Media Appearances

Many local radio and television stations have interview segments that allow you to talk about your program or upcoming workshop. To secure a spot on one of these programs, check the website and contact the program's producer or on-air host or reporter and ask to be a guest on the show. You can use your press release as support materials to give the producer more information about the program and you can offer to send a set of questions that the interviewer can ask to simplify the process for them.

Public Service Announcements

Contact your local radio station and ask to speak to the PSA or community affairs director. Give that person your "elevator speech," stressing the prevalence of chronic disease in your community. Explain the positive benefits of the workshop and ask him or her to read your PSA on the air regularly.

Social Media

Promoting your workshop on your social media channels can raise awareness, interest, and registrations. Using Facebook, you can create an EVENT and spread the word more widely by BOOSTING your event with paid promotion (see your Facebook page for boost and payment options).

Here are some resources to help:

Facebook Events: https://www.facebook.com/help/210413455658361?helpref=about_content

Promoting Events via Social Media:

<https://www.eventbrite.com/blog/how-to-promote-event-social-media-ds00/>

Building Awareness of Your Program

Program Profile:

Identify a local workshop participant whose well-being has dramatically improved as a result of the workshop. Ask if you can share his or her story with the media. In addition to individuals, look for couples, siblings, groups of friends and others who might make a good story and illustrate the social nature of the workshops.

- Once the story runs, share it through your community channels and with your community partners.
- Send the reporters thank-you emails. This will give you an opportunity to include additional information that may be helpful for them and remind them that you are a resource.

Online Advertising

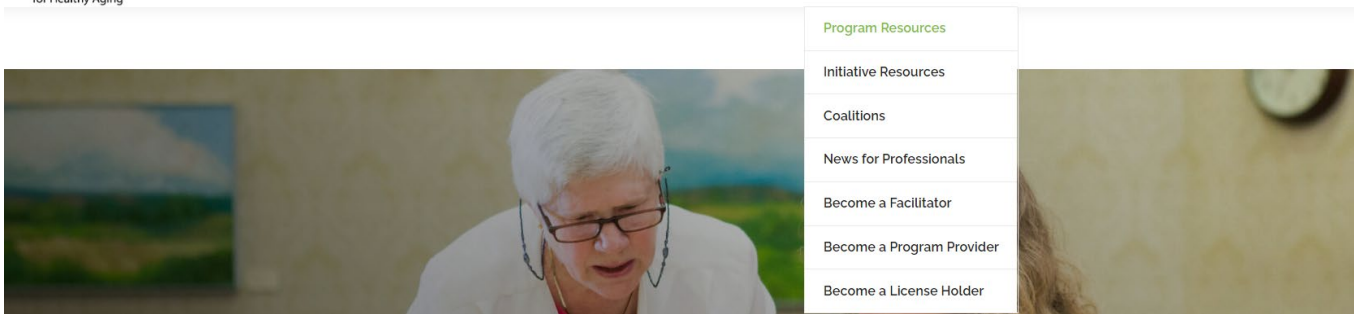
You may also opt to pay for online advertising. There are a multitude of options including Google AdWords or paying for Facebook post promotion (boosting).

Here are some resources:

Google AdWords: <https://ads.google.com/home/>

Facebook Post Boosts: <https://www.facebook.com/business/help/240208966080581>

Reminder: If a workshop isn't filling despite your best efforts, contact WIHA right away - preferably 1-2 weeks before your workshop start date! We'll help you identify ways and places to recruit that you haven't tried yet.



Find customizable marketing materials for each program by visiting the Wisconsin Institute for Healthy Aging website – wihealthyaging.org.

Once there, click on For Professionals, Program Resources, and then select your program. When you land on the page, click PROMOTING YOUR WORKSHOP drop down to find materials and resources.

If you have questions, contact WIHA at info@wihealthyaging.org

Chronic Disease Self-Management

- Living Well with Chronic Conditions & Tomando Control de su Salud
- Healthy Living with Diabetes & Vivir Saludable con Diabetes
- Healthy Living with Chronic Pain
- Healthy Living: Work & Home
- Mind Over Matter:
Healthy Bowels, Healthy Bladder

Materials

Find downloadable documents that are customizable for your use.

- Program logo
- 3-panel brochure
- Promotional flyer
- Poster/Display ad
- Refer-a-Friend Card
- Video (customize for fee – Stepping On only)

Falls Prevention Programs

- Stepping On

Caregiver Support

- Powerful Tools for Caregivers
- Powerful Tools for Caregivers of Children with Special Needs

Sample Materials

- Press release/Public Service Announcement
- Newsletter/bulletin announcement
- Elevator Speech template
- And more . . .

Physical Activity

- Physical Activity for Lifelong Success (PALS)
- Walk With Ease