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"Marketing for Results" [1994]

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# MARKETING

## FOR

# RESULTS



May 17 & 18 ILRU Case Management Meeting  
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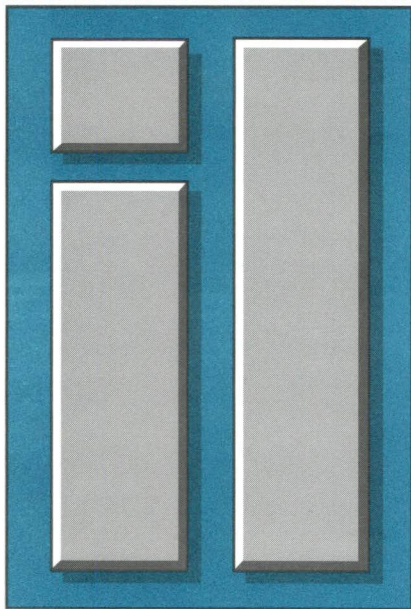
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## INDEPENDENT LIVING



## INFORMATION LINK

## MEMORANDUM

TO: Training Participants  
FROM: Laura Smith  
DATE: May 10, 1994

As some of you may already know, I will not be attending the May 17 & 18 training session. Several other trips were scheduled close to this training causing me to be away from the office considerably over the past few weeks. As my stamina is not what it used to be, and because I am currently negotiating and finalizing our next year's budget with RWJ, I made the decision not to make the trip to Ann Arbor.

I know I will be missing a great meeting as well as some beneficial discussions. I will look forward to hearing from each of you after the training to get your feedback. It appears fairly certain that we will plan to do another training with Greg related to marketing. Once that is confirmed, I will ask each of the sites to provide some input on the content of this training.

I also wanted to thank the staff of the Ann Arbor center for their assistance in planning this training and for hosting a reception for the participants.

I look forward to talking with each of you soon.



***Your thoughts on today's seminar...***

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I want to provide the best training possible, and your feedback on this session will help make that possible. I promise that I will read and give careful consideration to your views. ***Thank you.***

---

***1. How would you rank this training session on a scale from 1 to 16, with 16 being excellent?***

<b><i>Excellent</i></b>	<b><i>Good</i></b>	<b><i>Fair</i></b>	<b><i>Poor</i></b>
16 15 14 13 12	11 10 9 8	7 6 5 4	3 2 1

***2. What I liked best...***

***3. What I found most helpful was...***

***4. What I found least helpful was...***

***5. What would you recommend be changed for future sessions?***

***6. My other comments are...***  
***(Please use the back of this form.)***



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## **Marketing For Results**

**Session 1  
January 20 & 21,  
1994**

**Session 2  
May 17 & 18,  
1994**

<b>1</b>	Who will buy what? Market drive & Mission drive
<b>2</b>	The classic 5 P's of marketing
<b>3</b>	Publics: Who will you ask to buy?
<b>4</b>	Products: Who is buying what?
<b>5</b>	Places: The buying process & timing Personal action planning Homework for next time.....
<b>6</b>	What will they pay & how will you let them know they will benefit? Best Ideas from Marketing for Results
<b>7</b>	The Price: Increasing the value & lowering the costs
<b>8</b>	Promotion: Making the most of market, motivation, message, and media
<b>9</b>	2 Major Musts! Credibility & Rapport
<b>10</b>	Choosing from the communications arsenal! Copy tips! Personal action planning!

*Improving Service Systems for People with Disabilities  
Independent Living Research Utilization  
Case Management Marketing Training and Technical Assistance*

***Marketing  
for  
Results!  
Who will  
buy what?***

*Session 1: Houston; January 20 and 21, 1994*

***Marketing for Results!***  
***Who will buy what?***

***Major project outcomes...***

1. Development of a detailed, initial case management marketing plan...
2. that's responsive to your community, agency, and chosen markets...
3. so that you will provide needed and wanted services at a fee...
4. that will generate revenue for you to increase financial stability and independence...
5. to fulfill your Independent Living Center's mission.

# ***Marketing for Results!***

## ***Who will buy what?***

### ***This session's purposes...***

- 1. Overview the classic principles of marketing and show how to apply them so you can market case management even more successfully.**
- 2. Identify the best markets for your services so you will know who is most likely to buy and how to allocate your limited marketing time and resources.**
- 3. Consider the options for defining, offering, and providing the case management product so you will be selling what people are buying.**
- 4. Review the "buying process" to determine where to put your efforts and to increase the odds that you will promote at the right time.**
- 5. Exchange ideas; brainstorm strategies; share solutions that have worked for you.**

# **Marketing for Results!**

## **Who will buy what?**

### **Agenda topics...**

#### **1. Getting started...**

- **Introductions**, purposes, and agenda review.
- **Overview and desired outcomes** of this project.
- Current project status report: **A five-minute presentation.**
- How marketing fits with mission. (*Knowing when you are doing what and why you are doing it!*)
- Becoming a **social entrepreneur**. (*It does not have to be an oxymoron.*)

#### **2. Marketing...not just sales!**

- **Solving someone else's problem.**
- Why marketing is not sales!
- **Tapping into wants, not just needs.**
- A brief overview of the **classic 5 P's of marketing.**
- **Target Marketing:** Multiple-markets and multiple strategies.
- **Narrowcasting...not broadcasting!**

#### **3. The Publics: Who will you ask to buy?**

- The **problems with not identifying** your market specifically.
- Identifying potential **markets and market segments.**
- **Segments (and sub-segments) by type.**
- **Who is your customer?**
- **Buying roles** are another way to segment the market.
- **Push marketing...pull marketing.**

# **Marketing for Results!**

## **Who will buy what?**

- Reaching the **significant influentials**.
- Who is important! It drives the **four M's of promotion**.
- **Criteria** for selecting target markets.
- Who is most interested in **utilizing and purchasing** case management services? What you said.
- Deciding **who to target**.
- **Competitive analysis and positioning**.
- Turning a **competitor** into a **collaborator**.
- **Research on the markets**: What turns them on?
- **Live action market research**.

#### **4. The Products: Who's buying what?**

- Case management is really a **series of discrete products**.  
Unbundling for success!
- **Varying product/s and segmenting by market/s**.
- Is there increased market interest when you **unbundle**?
- Identifying the **core and ancillary products**.
- Sell **specific!** Let people **satisfice** not just maximize.
- **Should you be a department store or a boutique?**
- **Wholesaling and/or retailing**: Which one is best?
- The first purchase is always the hardest purchase.
- **Entry products...concurrent products...exit products**.
- **Sequencing of products** is important.
- Is **consultation** an entry, simultaneous, or exit product opportunity? Teaching people how to do it versus doing it!

## **Marketing for Results!**

### **Who will buy what?**

- Packaging: **Perception is reality!**
- **Names:** It is what you say it is.
- Does your **agency affiliation** help or hurt?
- Developing an **ILC product linkage strategy.**
- How do you (*should you?*) **cross market** services and products?
- The effective use of infomercials and advertorials.)
  
- **Tying the product to specific market niches.**
- Making the case management process and services as **tangible and results-driven.**
- Whenever you **develop a process product** you can generate revenue from new markets.

#### **5. The Places: The buying process and place in time!**

- Why you should break down the **customer-getting process.**
- The four phases of the **buying process:**
- Where might the **process break-down?**
- **Do you have an inquiry/contact problem or a conversion problem?**
  
- **When is your target market most likely to buy?**  
Asking at the right time. Can you predict the when?
- **Luck:** Increase the odds of being there at the right time.
- **The Rule of Seven!**
- **The window of follow-up.**

#### **6. Action planning!**

- What did you learn that you think will make a difference for you? Getting a return on your investment.

***Marketing for Results!***  
***Who will buy what?***

- What will you keep doing, start doing, stop doing, and think more about?

***7. Homework for Next Time:***

- Homework assignment for **second session**:
  - Completion of **first draft marketing plan**--- public, product and place.
  - **One live market test** with one chosen target market with a measurement of quantitative results.

***Next time: Pricing and Promotion!***  
***May 17 and 18, 1994***  
***Ann Arbor, Michigan***

*a spectrum of choices...*

## **Market Drive and Mission Drive**

**Organizations always have both a market drive and a mission drive.** The struggle in most organization is to find a balance between what they want to be and who will provide the resources to do it.

**A pure market-driven organization** responds to all external market opportunities with its consequent revenue streams, regardless of mission impact and preferences.

**A pure mission-driven organization** responds only to its internal preferences and will sacrifice revenue to accomplish higher goals and objectives.

**These two extremes can be viewed as being on the two opposing ends of a spectrum.** Most organizations have made the decision of where to be on this spectrum, either implicitly or explicitly. The major drive often changes depending on the environment and organizational status.

**In most nonprofit organizations** the attempt is to have just enough market drive to be able to finance and subsidize the mission drive. Finding the balance is the goal!

**Market-driven activities are a means to develop resources for the mission.** When you attempt to undertake market-driven and mission-driven activities simultaneously, you sometime are successful in neither. **Know when you are doing what and why!**

*a spectrum of choices...*  
**Market Drive and Mission Drive**

Where was your ILC three years ago?  
*the spectrum...*

Mission Drive							Market Drive	
1	2	3	4	5	6	7		

Where is your ILC today?  
*the spectrum...*

Mission Drive							Market Drive	
1	2	3	4	5	6	7		

Where should your ILC be three years from now?  
*the spectrum...*

Mission Drive							Market Drive	
1	2	3	4	5	6	7		

# **Sample Venture Criteria Worksheet**

## **1. What you will not do...**

- a. Because of mission...*
- b. Because of your image...*
- c. Because of your expertise...*
- d. Because of your risk-aversion...*
- e. Because of your organizational culture...*
- f. Because of staff and board time limitations...*

## **2. What you will do...**

- a. Because it meets your return-on-investment ratio...*
- b. Because it meets your resource goals...*
- c. Because it is feasible...*
- d. Because it is acceptable to the entire organization...*
- e. Because there is a market for it...*

***Marketing  
for Results!***

**Marketing...  
not  
just  
sales!**

***Marketing  
is...***

**Solving  
someone  
else's  
problem!**

**The Sales Question**

***What are you  
selling?***

*mutual exchange of value*

**Producer-----Customer**

*mutual problem solving*

***What are they  
buying?***

**The Marketing Question**

# What problems are you really solving?

**Market Segment:  
Self-Insured Employers.**

<i>Employer Problems</i>	<i>Your Solutions</i>

***Motivating them to return-to-work!  
Getting them back to work...quicker!  
Reducing your health costs!***

# *the classic 5 P's of marketing*

## **1. Public - *Who is the target?***

- Many targets, many segments, many motivations.

## **2. Product - *What is the offering?***

- Packaging the Product for the Public.
- Positioning within options.

## **3. Price - *How much for what?***

- Lower the costs! Increase the value!

## **4. Place - *Where, when, how buy?***

- Making it convenient and easy to buy.
- Asking at the right time.

## **5. Promotion - *Why buy?***

- Message, method, and media.

**This is your marketing plan!**

## ***Definitions with a difference...***

### **Marketing:**

How you develop, deliver, and communicate services that will attract, satisfy, and keep customers.

### **Promotion:**

How you communicate to potential target customers the benefits of your services to generate inquiries.

### **Sales:**

How you turn inquiries from potential customers into purchases through person-to-person interactions.

### **Public Relations:**

How you inform and influence various significant publics in your community to get awareness, support, and recognition.

### **Customer Service:**

How you provide quality services that meet and exceed the expectations of existing customers to retain them and create positive word-of-mouth.

# ***Strategic marketing is marketing smart!***

**Not just doing it, but doing it at the lowest costs with the highest return.**

## ***To market strategically you need to...***

1. Know who you want to reach as specifically as possible.
2. Understand as much as you possibly can about your desired market including their life situations and motivations.
3. Develop the services most wanted by your target market at the right price, at the right time, at the right place.
4. Communicate the best benefits to your specific chosen market as clearly and repetitively as possible.
5. Develop separate strategies for reaching each chosen market.
6. Understand as much as you possibly can about your current customer base including where they came from and why they chose you.

***To market strategically you need to...***

7. Break your buying process into as many discrete steps as possible to determine when you lose possible customers, why you lose them, and what you can do to move them from inquiry to customer retention.
8. Develop entry products to attract customers initially and develop exit products to retain them longer.
9. Consider the direct and indirect competitors for your desired customers and position yourself as desirably as possible.
10. Attempt to reach the customers that can best be served by your program while maintaining financial viability.
11. Continually test your assumptions and approaches in the marketplace and revise them when it is necessary.
12. Position yourself to respond to both today's and tomorrow's market.

***- Which of these do you believe are most important?***

***- Why?***

***- Which one should you give increased emphasis?***

## ***Why segment and target?...***

### **Remember!**

- Everyone is different.
- Everyone buys for different reasons.
  - *When you sell everything, to everyone, all of the time... you are selling nothing to no one, almost all of the time!*

### **Narrowcasting is best!**

- Broadcasting is trying to reach everyone.
- Narrowcasting is reaching the right targets *(those who want you and who you want) more frequently, with more targeted benefits.*

### **The first step: Customer Profiles!**

- Demographic and other descriptive information.
- Where they are and what motivates them.
  - Strategy is tied to target!

***Make Ms Mean  
Marketing Magic!***

**1. *M*arket**

**2. *M*otivation**

**3. *M*essage**

**4. *M*ethod**

**and *M*edia**

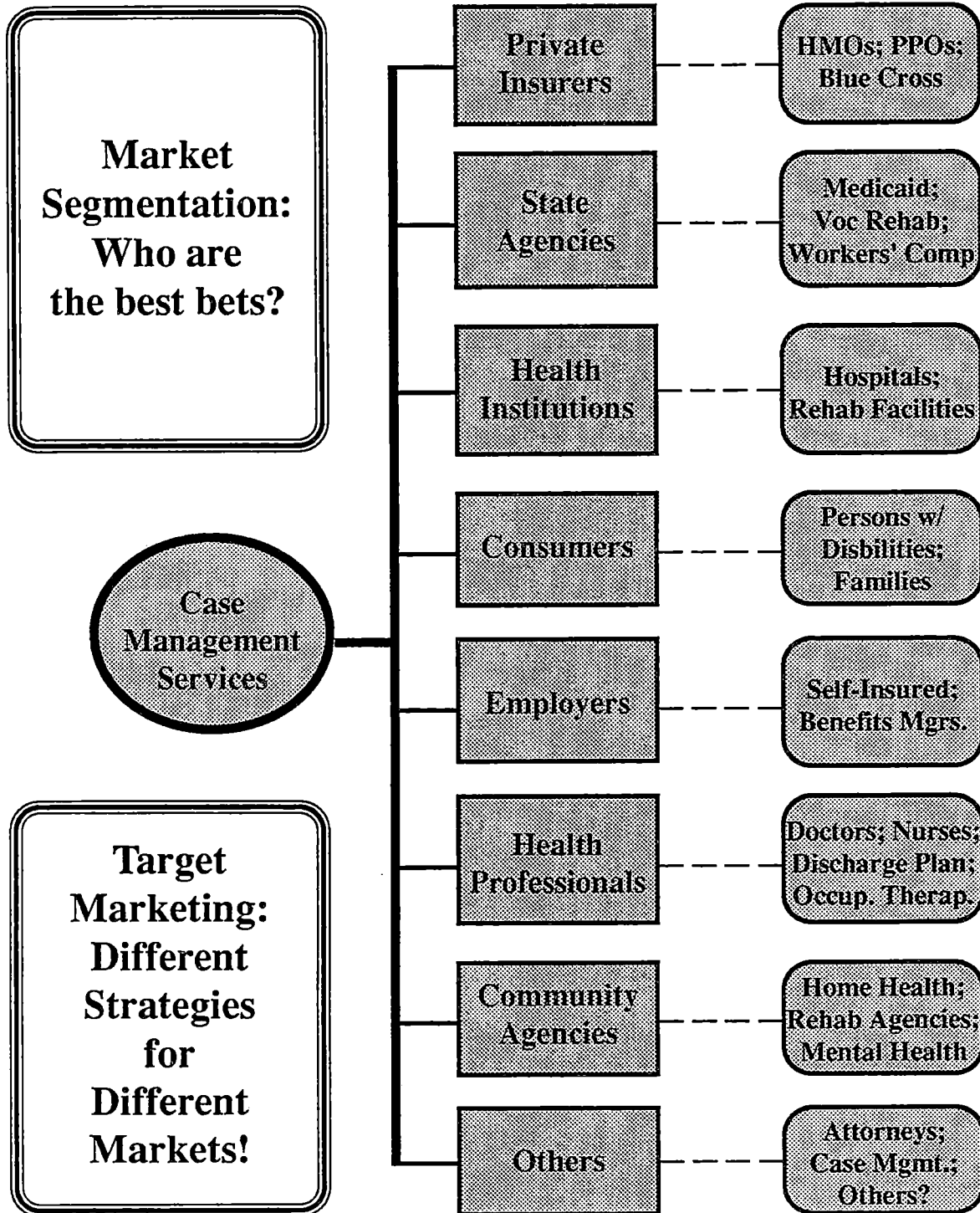
***Marketing  
for Results!***

**Publics:  
Who will  
you ask to  
buy?**

# Should you Expand the Market and/or Expand the Product?

	<i>Present Products</i>	<i>Improved Products</i>	<i>New Products</i>
<i>Existing Markets</i>	<i>A</i>	<i>B</i>	<i>C</i>
<i>Expanded Markets</i>	<i>D</i>	<i>E</i>	<i>F</i>
<i>New Markets</i>	<i>G</i>	<i>H</i>	<i>I</i>

***What did you decide?***



# ***Who is the customer?***

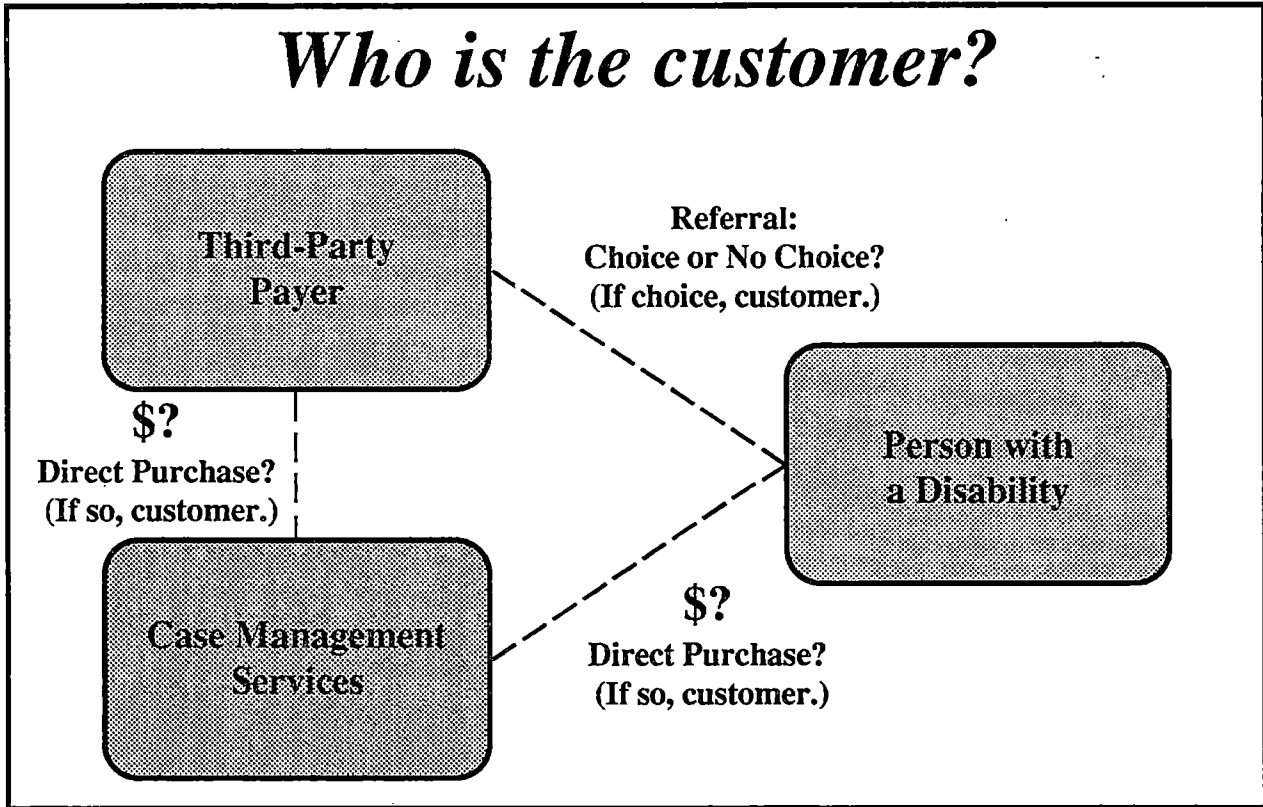
**Segmenting by buying roles.**

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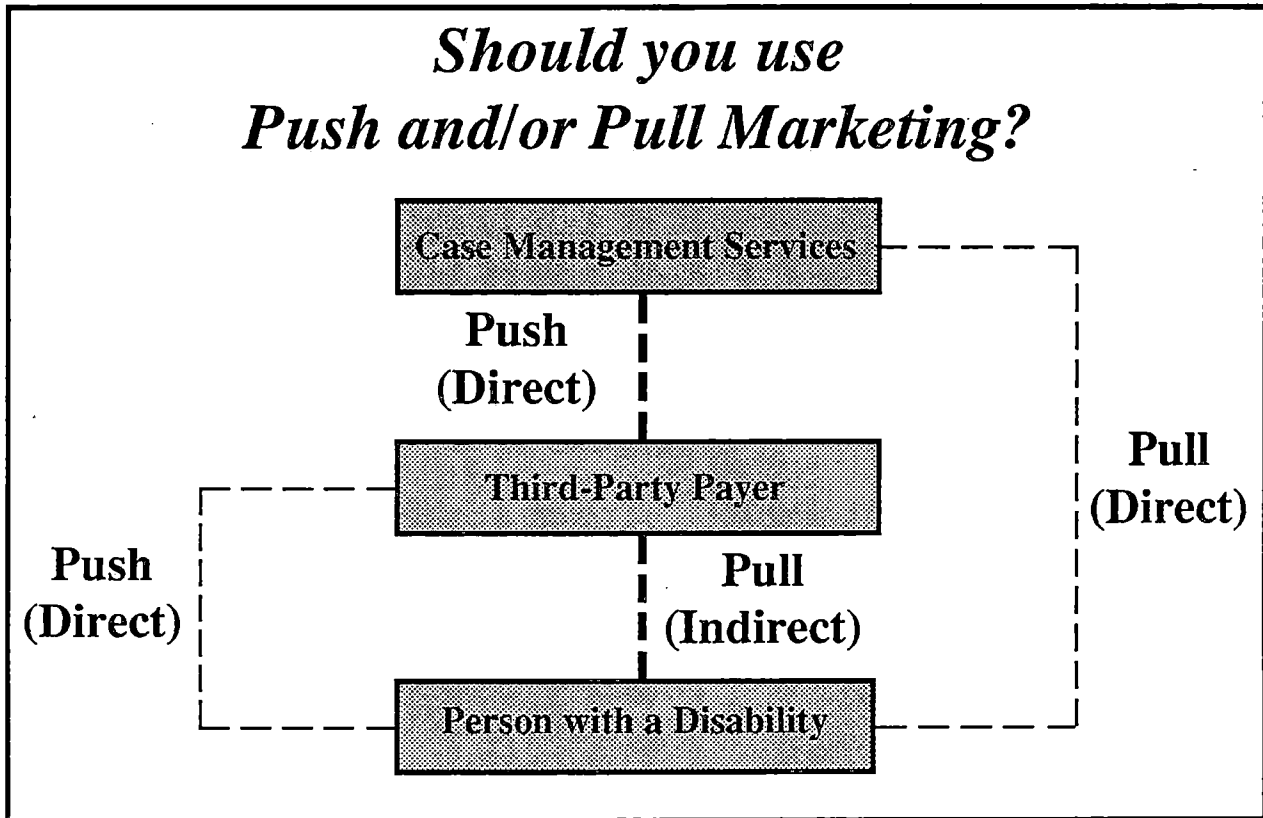
## ***Should you target...***

1. The initiator?
2. The influentials?
3. The decision maker?
4. The purchaser?
5. The direct user of the service?

## *Who is the customer?*



## *Should you use Push and/or Pull Marketing?*



**Targets  
within Targets:  
Target institutions  
and Individuals!**

**Who do you need to contact?**

- 1. The CEO?**
- 2. The technician?**
- 3. The user?**
- 4. The coach?**

**Always start...**

- with the easiest entry;**
- when possible, with a personal contact; and,**
- leverage outward from your contact.**

## ***Segmenting by buying roles within target markets...***

<b>Buying Roles</b>	<b>Blue Cross</b>	<b>Workers' Comp</b>
<b>1. Initiator/s?</b>		
<b>2. Influentials?</b>		
<b>3. Decision maker/s?</b>		
<b>4. Purchaser/s?</b>		
<b>5. Direct user/s?</b>		

**Your last customer is  
your best customer!**

**# 1 . Past Customers**

**# 2 . Referrals**

**# 3 . Competitors**

**# 4 . Customer Clones**

**# 5 . Other Customers**

## **Your past customers...**

### ***Who bought?***

#### **Ann Arbor**

Insurance companies and a private consumer who selected what he wanted.

#### **Helena**

Voc Rehab; Individual Consumers; Workers' Comp; Medicaid Waiver Teams.

#### **Missoula**

Voc Rehab; Workers' Comp (both are inconsistent and haven't purchased as money decreased).

#### **New York**

Health institutions; Voc Rehab.

#### **Portland**

Workers' Comp claim adjusters.

#### **Toledo**

Rehab Services Commission.

#### **Tulsa**

Process of getting certified as a case management provider for waived services under Title XIX-Medicaid.

#### **Worcester**

Social Services Dept. at HMO.

### ***Why did they buy?***

#### **Ann Arbor**

Recommended by University of Michigan Hospital.

#### **Helena**

Tough cases; no other options; need for independent living; felt we had expertise.

#### **Missoula**

Someone to be more directly involved and had time to follow-up.

#### **New York**

Need for increasing "healthful living" and transition from institution to community living.

#### **Portland**

One stop shop; touch all aspects of disability, IL, and AT.

#### **Toledo**

Competitive RFP.

#### **Worcester**

HMO has limits of coverage and services that don't meet needs. Have experienced the expertise IL case management has to offer.

## **Your desired customers...**

### ***Who have not bought?***

#### **Ann Arbor**

30 phone contacts; other insurance companies; industrial rehab facilities; Michigan Accident Fund (Workers' Comp).

#### **Helena**

Blue Cross/Blue Shield; Rehab Hospitals; Workers' Comp.

#### **Missoula**

Blue Cross; Voc Rehab; Workers' Comp.

#### **New York**

Health professionals.

#### **Toledo**

Insurance companies; Workers' Comp.

#### **Portland**

Blue Cross/Blue Shield; one HMO.

#### **Worcester**

Health institutions, hospitals and rehab facilities.

### ***Why did they not buy?***

#### **Ann Arbor**

Reluctant to try new case mgmt. strategy; confused about difference between core IL services and case mgt. services; not being an RN; haven't clearly and simply identified our product.

#### **Helena**

Funding mechanisms; arrived late in market; already have contacts with private rehab and managed care companies. Internal structure not flexible to allow non-medical payment

#### **Missoula**

Money to purchase; question long-term benefits.

#### **New York**

Health professionals are competitors in case management and can provide directly.

#### **Portland**

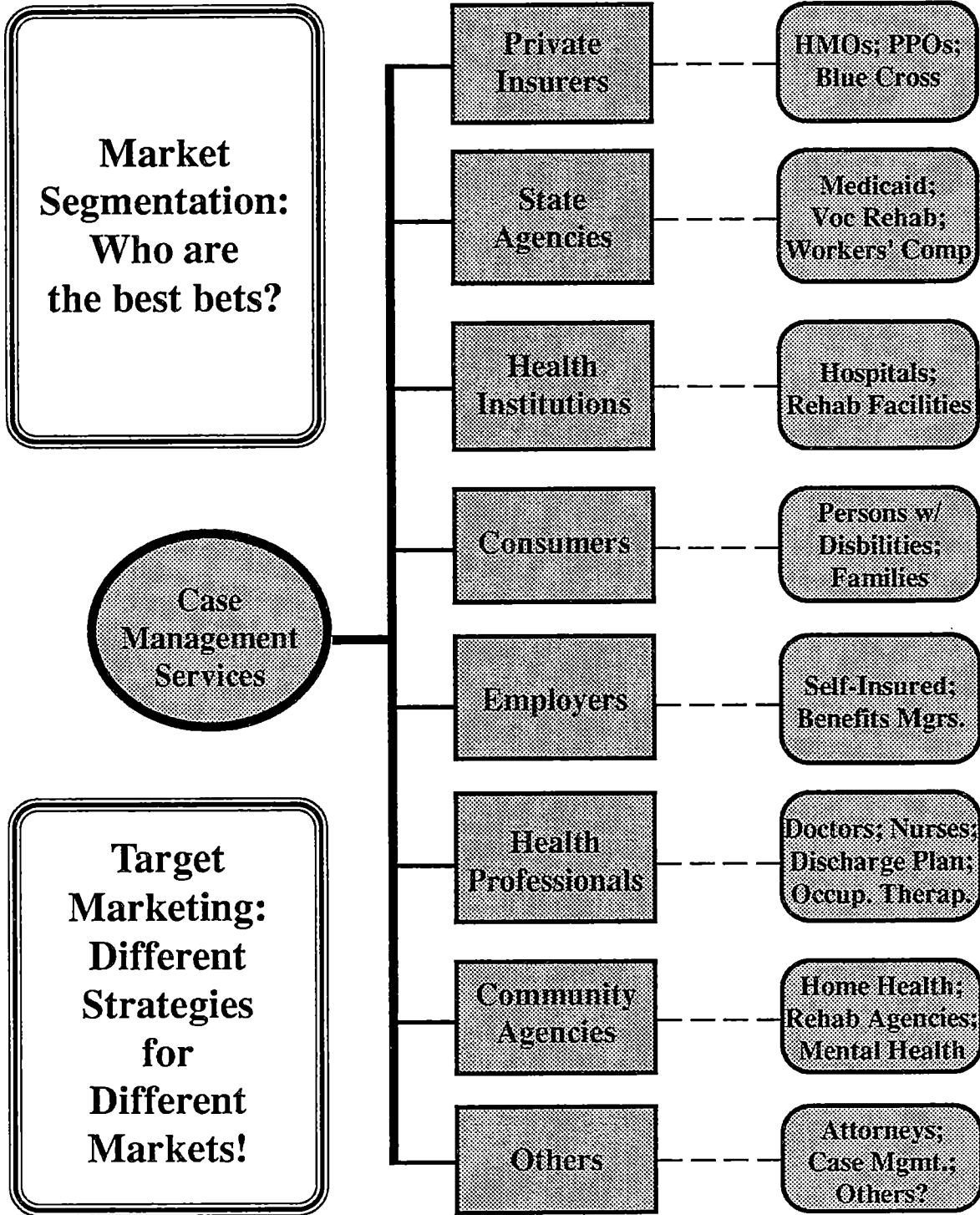
Probably failed to define service as a product worth buying.

#### **Toledo**

Don't know.

#### **Worcester**

Believe they already do it; consumer involvement and choice is threatening.



## Selecting the Target Markets: Your initial choices...

### **Private Insurers**

Ann Arbor - 1  
Helena - 3; 5  
Portland - 2  
Missoula - 2  
New York - 4  
Rochester - 8  
Toledo - 4  
Tulsa - 2  
Worcester - 2

### **State Agencies**

Ann Arbor - 4  
Helena - 1; 1  
Missoula - 1  
New York - 3  
Portland - 1  
Rochester - 2  
Toledo - 1  
Tulsa - 1  
Worcester - 1

### **Health Institutions**

Ann Arbor - 3  
Helena - 7; 8  
Missoula - 4  
New York - 1  
Portland - 6  
Rochester - 7  
Toledo - 8  
Tulsa - 4  
Worcester - 4

### **Health Professionals**

Ann Arbor - 5  
Helena - 8; 6  
Missoula - 5  
New York - 5  
Portland - 7  
Rochester - 6  
Toledo - 7  
Tulsa - 3  
Worcester - 8

### **Consumer**

Ann Arbor - 6  
Helena - 2; 2  
Portland - 8  
Missoula - 3  
New York - 2  
Rochester - 1  
Toledo - 2  
Tulsa - 5  
Worcester - 6

### **Employers**

Ann Arbor - 2  
Helena - 5; 7  
Missoula - 7  
New York - 6  
Portland - 4  
Rochester - 4  
Toledo - 3  
Tulsa - 6  
Worcester - 3

### **Attorneys**

Ann Arbor - 7  
Helena - 4; 3  
Missoula - 8  
New York - 8  
Portland - 3  
Rochester - 5  
Toledo - 5  
Tulsa - 8  
Worcester - 7

### **Community Agencies**

Ann Arbor - 8  
Helena - 6; 4  
Missoula - 6  
New York - 7  
Portland - 5  
Rochester - 3  
Toledo - 6  
Tulsa - 7  
Worcester - 5

# **Your choices: Target Markets and Segments!**

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**1. Target Market:**

***Segments:***

**2. Target Market:**

***Segments:***

**3. Target Market:**

***Segments:***

**4. Target Market:**

***Segments:***

# ***Positioning!***

## **Beating the competition...**

### ***Positioning is...***

- What makes you different.
- How you stand out from the competitors.
  - Why you should be chosen.
- How you beat the personal alternatives.

### ***Customers have choices...***

- Choose You.
- Choose Your Competitors.
  - Do it themselves.
  - Do nothing.

### ***What makes you different?***

***Your Competitors...***

***Your Advantages...***

## **Your competitive analysis...**

### **Your competitors...**

#### **Ann Arbor**

Large case management companies and independent case managers, as well as in-house case managers of third party payers.

#### **Helena**

Mgd. care; private rehab; others who are case managers; Workers' Comp; Voc Rehab, and hospitals.

#### **Missoula**

Case management and Medicaid Waiver social workers.

#### **New York**

Health professionals; insurance cos. with discharge planners on staff; community health services; home health care.

#### **Portland**

Don't know.

#### **Toledo**

Hospitals, nursing homes, home health care organizations.

#### **Tulsa**

Private insurers using their own case managers.

#### **Worcester**

HMO's and other third party insurers (e.g., Blue Cross).

### **Competitive advantages...**

#### **Ann Arbor**

Smaller; more personal relationship w/clients; in-house independent living services are more convenient and less costly; IL-OT background rather traditional RN.

#### **Helena**

Meet regularly with consumers; don't just rely on reports; holistic approach; variety of services; coordinate community resources.

#### **Missoula**

IL approach; advocacy training.

#### **New York**

Peer counseling; advocacy.

#### **Portland**

Consumerism is infused in system.

#### **Toledo**

Focus of control is on consumer and his/her family.

#### **Tulsa**

Know resources best, including alternative funding sources; independent philosophy and consumer autonomy.

#### **Worcester**

IL values consumer involvement; motivated consumers more likely to regain health and stay healthy.

# Competitors as a Marketing Opportunity!

## *When they have in-house capacity...*

1. Don't be a competitor.
2. Be a complement not a substitute.
3. Help them have success.
4. Find out what they don't do.

## *Can you turn a competitor into a customer?*

1. Selling consultation.
2. Selling training.
3. Selling complementary products.
4. Selling sub-contracting.

## *Can you turn a competitor into a collaborator?*

1. Co-marketing to increase demand, not share.
2. Co-venturing.
3. Co-promotion.

# ***Four target research options...***

## **1. Focus Groups**

Groups of less than 12 persons of a specific target group. A qualitative discussion of perceptions and motivations. Preferably led by an outsider.

## **2. Interviews**

Use this method for most important markets. Personal interviews on perception. One-on-one.

## **3. Mail Surveys**

Mail to as many or as few as you wish of a specific target group. Open ended and ranking questions.

## **4. Live Action/Test Marketing**

Test the promotion of a product and measure response. Use mail or phone. Vaporware: develop product when someone buys.

One of the hidden pluses of research is an opportunity to subtly promote your services, while gaining important market information. You will have to explain your services, if they are going to be able to give their opinions. When you undertake any of these recommended four research methods will accomplish education, promotion, and market insight simultaneously!

***Marketing  
for Results!***

**Products:  
Who  
is buying  
what?**

## ***Your products...***

### ***Sold what to whom...***

#### **Ann Arbor**

Medical case management services to three clients with spinal cord injuries referred by private insurance companies.

#### **Helena**

Peer helping to Workers' Comp, Voc Rehab, Medicaid Waiver, and Blue Cross/Blue Shield; independent living skills training to Voc Rehab, Medicaid Waiver, private adoption agency, and individual consumers; IL seminar for TBI to Voc Rehab, Workers' Comp, and tribes.

Independent skills training to consumer; financing skills to a consumer; peer helping to Medicaid Waiver Team; brain injury to Voc Rehab and various tribes.

#### **Missoula**

Advocacy for equipment, housing, transportation.

#### **Portland**

IL assessment and planning to Voc Rehab, high schools, Workers' Comp, attorneys, and consumers.

#### **Toledo**

Waiver Four (Dept. of HS).

#### **Worcester**

IL service delivery sold to state and federal funding sources and to Medicaid as part of the Personal Care Attendant Programs.

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### ***Not yet bought...***

#### **Ann Arbor**

IL Core Services.

#### **Helena**

Case management by itself or as an entirety to anyone.

#### **Missoula**

One-on-one training of self advocacy by Voc Rehab, Workers' Comp, and Blue Cross.

#### **New York**

Hope to sell assessing, planning, and facilitating transitions.

**Your case management services can be**

***unbundled***

**to get the best market response..**

<b>Bundled</b>	<b>Unbundled</b>
<b>Case Management Services</b>	<ul style="list-style-type: none"><li>- <b>Assessing</b></li><li>- <b>Planning</b></li><li>- <b>Advocating</b></li><li>- <b>Brokering</b></li><li>- <b>Motivating</b></li><li>- <b>Empowering</b></li><li>- <b>Reporting</b></li><li>- <b>Transitioning</b></li></ul>

**What are the core services?  
What are the ancillary services?  
How does it vary by market?**

**your thoughts on unbundling...**

**Assessing**

Ann Arbor - 3  
Helena - 1; 1  
Missoula - 2  
New York - 3  
Portland - 1  
Rochester - 2  
Toledo - 4  
Tulsa - 1  
Worcester - 4

**Planning**

Ann Arbor - 4  
Helena - 2; 2  
Missoula - 3  
New York - 2  
Portland - 2  
Rochester - 4  
Toledo - 5  
Tulsa - 2  
Worcester - 2

**Brokering**

Ann Arbor - 5  
Missoula - 4  
New York - 6  
Portland - 3  
Rochester - 6  
Toledo - 8  
Tulsa - 3  
Worcester - 1

**Motivating**

Ann Arbor - 1  
Helena - 3; 3  
Missoula - 5  
New York - 4  
Rochester - 3  
Toledo - 6  
Tulsa - 6  
Worcester - 3

**Reporting**

Ann Arbor - 6  
Missoula - 6  
New York - 5  
Rochester - 4  
Toledo - 9  
Tulsa - 5  
Worcester - 9

**Facilitating  
Transitions**

Ann Arbor - 2  
Helena - 7; 4  
Missoula - 1  
New York - 1  
Rochester - 1  
Toledo - 7  
Tulsa - 4  
Worcester - 6

**Others:**

**Skills Training:**

Helena - 5; 5; Toledo - 1

**Support Groups:**

Helena - 6; 6; Toledo - 3

**Monitoring,  
evaluating,  
reassessment:**

Worcester - 5; 7; 8.

**Peer Mentoring:**

Toledo - 2

**Acquire benefits:**

Helena - 4

# **Bundled and Unbundled!**

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## **Ann Arbor's Independent Living Case Management Services Product List:**

1. Coordination of Medical and Rehabilitation Services and Community Resources.
2. Independent Living Assessment.
3. Return-to-Work Explorations.
4. Arranging Personal Assistant Services.
5. Personal Adjustment Counseling.
6. Education.
7. Advocacy.
8. Barrier Free Housing Assessment
9. Barrier Free Transitional Living Apartment.
10. Medical Management

## **Product thoughts...**

1. Sometimes, people like to buy bundled.  
Sometimes, people like to buy unbundled.  
Always, give the customer a choice.
2. Most of the time, you should start with core products and add ancillary products. Sometimes, a core product for one market is an ancillary product for another market.
3. People always like to buy specific!
4. People maximize and satisfice.
5. The first purchase is always the hardest purchase. Start small and follow-up with tag-on sales.

*Getting your foot in the door...*

***What are the pluses and minuses of using "tough cases" as an entry product?***

**Seek customers from feeder, concurrent, and exit services**

**Feeder  
Service  
Systems:**

**Concurrent  
Service  
Systems:**

**Exit  
Service  
Systems:**

**Case  
Management  
Services**

# **Perception is reality.**

- When marketing intangibles and services,  
**the product is what you say it is.**
  - Alternative conceptualizations  
of the product is **packaging.**
- Develop **market-responsive names.**

# **What's in a word? *Everything!***

**Pull out your business card and look at the  
agency name and the position title.**

**Ask yourself:**

- *What does it communicate to your customer?*
  - *What does it say your product is?*
- *What does it say that you will do for them?*

**How you do it is not necessarily what you promote!**

***Do what you do...  
and call it by its best name!***

<b><i>How you do it... (Your methods!)</i></b>	<b><i>Is it a customer benefit? (The end results!)</i></b>
1. Focus on Consumer.	
2. Consumer Empowerment	
3. Advocacy	
4. Education.	
5. Nontraditional methods.	
6. Operated, delivered by people with disabilities.	

**Method can be a benefit.  
It depends upon your customer.**

**Do you like the product name "case management"?**

**Ann Arbor:** No. Generic term that means different things.

**Helena:** No.

**Missoula:** No.

**New York:** It's OK. People (consumers, agencies) have a sense of what it means, although it's really not clearly defined.

**Portland:** No. It implies that people need another party to manage their "case"---yuk! It's contrary to IL philosophy.

**Tulsa:** Yes, case management is appropriate language.

**What are the alternatives?  
Does it depend upon your target?**

**How would you describe your product in not less than two sentences? (Focus on the benefit to a customer!)**

**Ann Arbor:**

Working in concert with the injured person and his insurance company, employer, and family, we coordinate medical and rehabilitation services. In addition to that, what makes our IL Case Management services unique is we enable people to make decisions and to take control over their lives at an earlier stage. Using as peers people with disabilities with similar life experiences who are out in the community living their lives provides a sources of motivation and hope that speeds up the rehabilitation and recovery process for the client and makes it less costly for the payer.

**Helena:**

We provide an array of specialized services for persons with a disability. These services are designed to assist and individual in coming to terms with their disability, making plans for the future, and developing a course of action that encourages full participation in society.

***How would you describe your product in not less than two sentences? (Focus on the benefit to a customer!)***

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**Helena:**

A biopsychosocial approach which includes community, health, and support practice. We use the whole person approach which devotes substantial effort in developing a human relationship with the consumer and his/her support network. Case management placement substantial emphasis on problem solving, assistance to consumers and their support networks and provides an exchange of information and knowledge between case manager and the consumer.

**Missoula:**

Consumer advocacy.

**Toledo:**

Resource coordination for persons with head injuries and their families.

**Tulsa:**

Case management services assist an individual with selecting services to meet his or her needs; monitor the delivery of those services; evaluate how well they are working; and make appropriate changes, as necessary.

**Worcester:**

Health Care Access service establishes and maintains a total service relationship coordinated among consumers, provider and other related organizations. This partnership assures quality, accessible health care designed to meet the self-identified needs and goals of the client.

# ***Image Links!***

***Do you want a family identity?***

*Should you promote the Independent Living Center or the Case Management Service? If both, should you have strong links, weak links, or no links?*

## **3 choices...**

### **1. The Department Store!**

Sell the agency and feature case management services.

### **2. Beatrice Foods!**

Sell case management and let the agency tag-on.

### **3. General Motors!**

Sell the agency and sell programs separately.

***What you think about the link...  
does it help or hurt?***

**Ann Arbor:**

It can go either way. At times, we receive feedback that it confuses people regarding our case management services; it tends to dilute what case management is. It helps in our own immediate community where we are known and respected.

**Helena:**

Both. ILCs are seen as advocates/potential adversaries. On the other hand, their expertise derived from experience is also recognized.

Sometimes it does, because we are not a rehab program or we are sometimes seen as advocates. But we are also liked because we are seen as someone independent and are consumer driven. People seem to be less threatened by us.

**Missoula:**

Depends on agencies' knowledge of what an ILC does. Whether they believe in the concept of consumer control.

**New York:**

Helps with agency and health institution marketing because it shows we have experience, but conversely they questions why ILCs cannot provide this service without cost because the ILCs are funded (state and federal) to provide these services.

**Portland:** It's conflicting.

**Rochester:**

Would not help; due to philosophy and service connection by private sector.

**Toledo:** Helps!

**Tulsa:**

Highlighting helps as the agency is recognized in the community as an advocacy agency for people with disabilities. The target audience should have the same outcome objective---an informed consumer assuming responsibility for decision affecting his or her life. Ideally, those decisions will enhance independence.

**Worcester:**

Both. Those in the community with view people with disabilities positively recognize the value of CLW and independent living. Others associate ILC with advocacy efforts to affect change in the community which is not always appreciated. Advocacy to some means trouble rather than progress and equal access.

# Turn your education mission into promotions...

## Use INFOmercials!

An INFOmercial is a **verbal presentation** that **provides useful information to the listener**. It builds **credibility** through providing information.

Don't describe your organization or services directly.  
**Promote your services indirectly!**

**Save the pitch to the end!**

## Use ADvertorials!

An ADvertorial is a **written presentation** of useful information.

It presents your services as **one of the solutions to the problem to be solved**.

**Make sure your name and phone number is on every page.**

**When you sell intangibles...**

1. You must tell people what they will get.
2. You must tell people they are getting it.
3. You must tell people they got it.

***You must develop tangibles or they will not know that they got what they bought.***

**Seek tangibility by...**

Producing paper that reflects process steps.

Turning it into dollars.

Reporting frequently.

Seeking satisfaction responses.

***Phone calls and visits disappear!***

# **Products for your Target Markets and Segments!**

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**1. Target Market:**

***Segments:***

***Products:***

**2. Target Market:**

***Segments:***

***Products:***

**3. Target Market:**

***Segments:***

***Products:***

**4. Target Market:**

***Segments:***

***Products:***

***Marketing  
for Results!***

**Places:  
The buying  
process  
and timing!**

# PLACE

*Where, when, and how you buy it...*

## ***1. The Physical Place...***

Where it is and how you get to it.

What it looks like.

What it communicates.

What image the customer adopts by shopping there.

## ***2. The Distribution System...***

How one buys.

How easy it is to buy.

How much trouble it is to buy.

Easy access.

## ***3. The Place in Time...***

The right offer, to the right person, at the right time.

Available when the customer has the problem.

## **Place: Distribution and Buying Process**

### **The four customer-getting phases:**

1. Inquiry/initial contact...
2. Initial conversion/purchase...
3. Delivery/customer retention...
4. Tag-on sales and referrals.

- 
- You need different marketing methods and materials for every phase.
  - It is hard to generate an inquiry. You must work to convert every inquiry into a purchase.
  - Do you have an inquiry generation problem or a conversion problem? What are the ratios?
  - Customers are hard to find. You must sell more to the few you have.

**Place:**  
**Distribution and Buying Process**

**Generate more sales** by working the process in this order:

1. Sell more to those who have already bought;
2. Get more initial contacts through referrals from past customers;
3. Retain and upgrade current customers;
4. Convert more of those potential customers who have shown at least some interest; and, then,
5. Work on generating inquiries and making new contacts.

***Are you making  
the right offer  
to the right person  
at the right time?***

- Are you offering the product at the time the customer has the problem?
- Are you asking enough times so that you will increase the odds of it being the right time?
- Are you going with the time most people are most likely to say yes?

***Your seasonal variations...***

**Ann Arbor:** Summer and holidays there are increases in catastrophic injuries and the referrals for case management.

**Helena:** Fall and Winter.

**Missoula:** At beginning of budget year for Voc Rehab; none with Workers' Comp or Blue Cross.

**Up the odds of being there  
at the right time!**

1. **Luck** plays a major role. Up the odds of being there at the right time by being there **frequently**.
2. **The Rule of Seven:** Stay in touch at least 7 times in 12 months.  
  
(**Varying contact** by mail, by phone, and by personal visit.  
Don't be a pest, but stay in touch!)
3. The **window of follow-up** is between 3 days and 2 weeks. Motivation to buy varies over time; you have to capture it when its hot.
4. **Synergy:**  $1 + 1 = 3$ .  
Follow-up the follow-up!



***Homework for Next Time...***

1. Completion of **first draft marketing plan**---public, product and place.
2. At least **one live market test** with one chosen target market with a measurement of quantitative results.

***Due April 1, 1994.***

***Next time:  
Pricing and Promotion!***

***May 17 and 18, 1994  
Ann Arbor, Michigan***

*Improving Service Systems for People with Disabilities  
Independent Living Research Utilization  
Case Management Marketing Training and Technical Assistance*

# ***Marketing for Results!***

***What will they pay  
and how will you  
let them know  
they will benefit?***

***Session 2: May 17 and 18, 1994***

## ***Marketing for Results!***

***What will they pay and  
how will you let them know they will benefit?***

### ***This session's purposes...***

- 1. Assess what you have tried and learned since the last session.**
- 2. Give additional recommendations for making sure all 5 P's of marketing count for your venture.**
- 3. Discuss the options to set a price and how to increase the perceived value beyond customer's cost.**
- 4. Provide a menu of options for promoting your services and determine which will be most effective for which markets.**
- 5. Exchange ideas; brainstorm strategies; share solutions that have worked for you.**

# ***Marketing for Results!***

***What will they pay and  
how will you let them know they will benefit?***

## ***Agenda topics...***

### ***1. Getting started...***

- **Introductions**, purposes, and agenda review.
- A quick review of the first three Ps and the two Ps to be covered this time.
- Catching up: What has happened since last time?

### ***2. Homework: Your market test and the first 3 Ps.***

- Best bets from the last session: Did you try them?
- **Your homework:**
  - *What did you learn from your live market test?*
  - *What did you learn from the development of your plan?*
- Peer-to-peer consultation.

### ***3. The Price: Increasing the value and lowering the costs.***

- **What is your pricing goal?**
- Are you pricing for your mission or are you pricing to make money for your mission?
- Your price must meet both mission and market needs.
- Establishing a pricing strategy that maintains value perception, is market viable, and increases the likelihood that this service can continue after the foundation's support is ended.

## ***Marketing for Results!***

### ***What will they pay and how will they benefit?***

- Overcoming the price resistance in your mind.
- Do you really believe you are doing something valuable?
- **Price is cost and value. Both count!**
- You can lower the price to increase the value...
- or you can increase the value to lower the price.
- Cost has three elements:  
The direct, the indirect, and the psychological costs.
- **Value in service marketing is always nebulous.**
- Why you should never use the word "free"...  
and what to use instead.
- Never tell the price without telling the value.
- Always tell the value before you tell the price.
- Three ways to set a price: which one is best?
- **Your pricing choices:**  
cost mark-up; customer value; competitive.
- Should you first set the price and then determine whether  
your cost is worth it?
- Market research: Who are your competitors and  
how much do they charge?
- **Why it is usually better to set a price that is  
too high than to set it too low.**
- The important concept of consumer surplus.
- The problem with positioning solely on price.
- What happens if you have a small market and limited products?
- Pricing messages from the market.
- Use price reduction to close a deal, not to initiate a sale.
- **Alternative pricing methods: Choose the best one!**  
Unbundle: what are your core and ancillary services?
- Value-added pricing through unbundling.  
(How case management services can be like a concierge floor.)

## **Marketing for Results!**

***What will they pay and how will they benefit?***

- Should you price by the hour, by the unit, or by service contract?
- Should you have a performance-based contract?
- Price by how much money you will save your customer!
- Wholesale pricing and retail pricing: More should cost less.
- Some customers have a high initial cost, but also a high life time value.
- **Practice in setting and stating your price.**

### ***4. Promotion: Making the most of market, motivation, message, method, and media.***

- **The four M's...and the five P's.**
- The first question is always who...then how.
- Three things to remember about promotion.
- **The most important rule:**  
**Selling the benefits and not the features.**
- Identifying the prime benefit streams for target markets.
- **Promoting in person.**
- Managing relationships will bring you sales.
- Before you make your first contact: research!
- Who should you initially contact? (Anyone you know!)
- Getting your foot in the door.
- Methods to successfully present the product in meetings with your chosen markets.
- Let me hear you describe your services in one sentence (using the lead benefit to your target customer).
- Developing a presentation script.
- How to establish credibility in the first meeting.
- The three most important promotional documents to take with you. (They cost under five-cents each.)
- A step-by-step guide to following-up the first meeting.

## ***Marketing for Results!***

***What will they pay and how will they benefit?***

- **Seventy-nine weapons in your communications arsenal: which ones are right for you and your target markets?**
- Which ones are best for initiating contacts, for closing sales, and increasing repeat business?
- Promotional strategies to encourage to reach markets that do not respond well to traditional "hard-sell" promotions.
- Stretch your promotional budget---but have one!
- **Direct Mail: Writing effective letters!**
- What there is to learn from Publisher's Clearinghouse Giveaway.
- Twenty tips that have been proven to work.
- **How to write promotional materials that pull response!**
- The ten most common mistakes.
- Copy tips! Brochure hints!
- A round-up of ideas for even better marketing materials.
- **The Brochure Clinic: Take a look at your current materials and make plans for improvement.**

### ***5. Putting it all together.***

- **Your final marketing plan.**
- Your decision: make or buy.
- How big should your marketing budget be?  
(Do you mean, "how big should your promotional budget be?")
- When should you "take a walk"?  
(When do you take the hint that you need to change ventures?)
- Methods for building internal support for your venture.
- Final thoughts!

### ***6. Action planning!***

- Summary action planning to implement the series.
- What did you learn that you think will make a difference for you? Getting a return on your investment.

# *the classic 5 P's of marketing*

## **1. Public - *Who is the target?***

- Many targets, many segments, many motivations.

## **2. Product - *What is the offering?***

- Packaging the Product for the Public.
- Positioning within options.

## **3. Price - *How much for what?***

- Lower the costs! Increase the value!

## **4. Place - *Where, when, how buy?***

- Making it convenient and easy to buy.
- Asking at the right time.

## **5. Promotion - *Why buy?***

- Message, method, and media.

**This is your marketing plan!**

**Best Ideas  
from  
Marketing For Results!  
on January 20 and 21, 1994**

1. In deciding entrepreneurial ventures, agencies should identify **“what they will not do”** because of mission constraints.
2. **Entrepreneurial ventures should fund mission activities** and success is most likely when you do not attempt to accomplish mission objectives simultaneously with money-making marketing.
3. In developing venture ideas, you can **either expand your markets or expand your products**. When you attempt to do both simultaneously, risk increases. New products to new markets is the riskiest of all.
4. Marketing is **solving someone else’s problem**.
5. You should market to **meet wants, as well as needs**.
6. It is not **“what you are selling”**; it is **“what they are buying”**.
7. **The full five P’s of marketing** (public...product...price...place...and promotion) should be addressed for the greatest success.

**Best Ideas from Marketing For Results!**

8. You must use **different strategies to reach different markets.**
9. Identifying **who is the customer** and the difference between payer and service user is critical for targeting your marketing efforts.
10. When marketing your services, you should **sell outcomes and solutions** and not the process steps you take.
11. You should **emphasize your current customer base and make your last customer your best customer.** It is always easier to sell more to someone who has already bought than to sell to someone who has never bought before.
12. Both **credibility and rapport** count in the personal marketing of services. In most cases, credibility must first be established before rapport can be used to nurture the relationship.
13. In many cases it is better to market the service, before you develop it (i.e., "**vaporware**"). You can test the market by offering services and evaluating response to ascertain whether the product should be developed.
14. You should determine whether you have an **inquiry problem, a conversion problem, a satisfaction problem, and/or a repeat business problem.** Inquiry-to-sales conversion ratios are needed to evaluate efforts.

# ***Homework!***

***1. What did you learn from your live market test?***

***2. What did you learn from the development of your plan?***

***Marketing  
for Results!***

**The Price:**

***Increasing the value  
and  
lowering the costs.***

## **What is your pricing goal?**

- 1. What is the desired end result?**
  - a. Is it to make a profit?**
  - b. Is it to break-even?**
  - c. Is it to provide a subsidy?**
  
- 2. What is the primary purpose of your offering?**
  - a. Mission?**
  - b. Make money for the mission?**
  - c. Attempt to do both?**
  
- 3. How will you evaluate pricing success?**
  - a. Number of purchases?**
  - b. Mission accomplishment?**
  - c. Revenue generated/profit made?**
  - d. All three?**

***These three questions must be answered as a preamble to your pricing strategy!***

### ***Your price should...***

- Meet your mission and/or market purposes;**
- Be market viable;**
- Maintain the perception and possibility of value;**
- Develop sufficient revenue to operate without subsidy.**

***Sometimes,  
the biggest problem is the  
price resistance  
in your mind!***

***Messages from your mind...***

- What do you think you and your services are really worth?
  - Are your services of high quality and valuable?
  - Have you ever chosen to pay a higher price?
  - Is a no to a price really a personal rejection?

***Messages from the market...***

- When everyone says yes, you may be priced too low!
- When everyone says no, you may or may not be priced too low.
  - People often use price as a convenient (and acceptable) excuse for saying no.
  - Price resistance is frequently rooted in the other 4 P's of marketing.

## ***Price: Cost and Value***

1. Whenever people are considering a purchase, **cost and value are weighed in tandem.**
2. When the perceived **cost is higher** than the perceived value, people **do not buy.**
3. When the perceived **value is higher** than the perceived cost, people **buy if they can afford it.**
4. People always want the **highest value for the lowest cost.**
5. **Higher-risk purchases:** **value** tends to be more important.
6. **Lower-risk purchases:** **cost** tends to be more important.

7. Sometimes, **cost** is used as an **indicator of value**.
8. If people have a **critical need** for a product, they will pay any cost they can afford.
9. If a **third-party** is **covering the cost**, people **seek value**.
10. You can **lower the perceived cost** to increase relative value.
11. You can **increase the perceived value** to lower the relative cost.
12. Which is most important?  
**It depends on the customer.**

**Cost is what you pay!**  
**Value is what you get!**

# ***Price is three costs and three values***

## ***Costs...***

### **1. Direct**

*Hard cash: sticker price.*

### **2. Indirect Cost**

*Hard cash: use product.*

### **3. Psychological**

*Non-cash: cost to mind.*

## ***Value...***

### **1. Actual**

*Worth; solves problem.*

### **2. Added**

*The surprise; the deal.*

### **3. Perceived**

*Benefit to the mind.*

***What is the  
price  
to your target?***

<b><i>The cost paid...</i></b>	<b><i>The value received...</i></b>
<b>Direct Costs:</b>	<b>Actual Value:</b>
<b>Indirect Costs:</b>	<b>Added Value:</b>
<b>Psychological Costs:</b>	<b>Perceived Value:</b>

***Lower costs! Increase value!***

# ***Increase value!***

1. **Always work first on increasing actual, added, and perceived value.** If the value is high enough, buyers will follow even if the cost is high.
2. In service marketing, perceived value is most important.
3. **Perceived value** is always nebulous.
4. **People determine the perceived value of services:**

<b><i>Before purchase...</i></b>	<b><i>After purchase</i></b>
1. Expectations.	1. Met expectations.
2. Severity of problem.	2. Alleviation of problem.
3. Value proxies.	3. Packaging.
4. Description and vision.	4. Tangible evidence.
5. Costs to be saved.	5. Costs saved.
6. Reputation.	6. Personal satisfaction.

5. Consider giving "added value" before reducing direct costs. **Added value can be used to close the deal.**
6. **Never tell the price without telling the value.**
7. **Always tell the value before you tell the price.**
8. **When asked a cost question, respond first value.**
9. **When they say the cost is too high, return to value.**
10. **Always tell (and make explicit) the full value for the cost.**

# **Lower costs!**

1. First, work on **reducing psychological cost**.  
Then, work on **reducing indirect costs**.  
Then---if you simply must---**reduce direct costs**.
2. When you reduce direct costs too early and too frequently, you **lose price integrity and reduce value perception**.
3. You can **lower a direct cost to get a customer initially**, but be careful of setting the benchmark price for the future. State clearly it is introductory and time-limited.
4. You can **offer discounts** for a number of reasons: mission; future purchasing power of the customer; off-peak periods, bulk purchases. (A higher direct cost permits discounts---lower direct costs do not!)
5. If you give a discount, **make sure they know they got it**. (An invisible discount has no benefit; it is just a cost.) Make it tangible: coupons; letters; continuous verbal reminders; invoices explicitly stating the discount.
6. **Sliding fees can reduce value perception**. Whenever the customer is presented with two prices, the lowest price is always perceived to be the real value. Give discounts (and coupons, if appropriate) instead.
7. Even with giving a premium or an initial consultation, **avoid the word free**---it lowers value. Consider using "at no cost to you."

***3 ways to set price!***

***The Ceiling:***  
**The Value to the Customer**

-----

***The In-Between:***  
**The Competitive Price**

-----

***The Floor:***  
**Your Production Costs**

-----

## **3 ways to set a price...**

### **1. Your pricing choices:**

- cost mark-up;
- customer value; or,  
competitive.

### **2. Cost mark-up: Who cares if the price has a fair profit margin if no one will pay it?**

A standard percentage mark-up over costs may put you above or below both the customer value to the customer. It may also put you above or below the competitive price. Both are problems.

### **3. Should you first set the price and then determine whether your production costs will mean a profit?**

Yes! In the past, businesses first determined cost...then, determined price. Today, the best method is to first determine price...then see if the product/service can be produced at a cost that will provide a sufficient profit.

### **4. The competitive price is even more important when:**

- The customer has alternatives;
- The customer has plenty of information on the marketplace; and/or
- You are attempting to lure customers from competitors.

**5. The relationship of your price to the competitive price sends the customer a value/cost message:**

What is the advantage of being just a *little* above the competitive price? What is the advantage of being just a *little* below?

**6. Market research: Who are your competitors and how much do they charge?**

There are three types of competitors:

- Direct---offering the same services;
- Indirect---offering similar services; and/or,
- Self-Help---customers doing it themselves.

What do direct and indirect competitors charge? Call and ask. Ask your current and/or potential customers. Can you differentiate your service by value enhancements or reduction of non-direct costs? If so, you may be able to charge a little bit more.

Self-help is more of a challenge. Many times customers think self-help is at no cost. Show all of the costs you will receive and all of the value to be gained. Ask if you can help them help themselves.

**7. Customer value shifts with need and want.**

Remember: all three of these---the floor, the ceiling, and the competitive price---are in constant flux. When new competitors enter or your costs increase, the best response is to increase the value to the customer, which always drives prices up!

***Why it is usually better to set prices too high than to set prices too low...***

**1. Which business would you rather be in:**

100 widgets at \$1 each = \$100 revenue; or  
25 widgets at \$4 each = \$100 revenue; or  
1 widget at \$100 each = \$100 revenue?

Unless there is a mission reason: it is not the number of customers, but the total amount of revenue; it is not the number of sales, but the profit generated. In general, it is better to have fewer customers at a higher price.

**2. Your potential market may not be big enough to position on price.**

Walmart can position on price---it has a big potential market where big profits can be made by making a little bit of money on a large quantity of products. Is this true for you?

**3. Higher prices permit discounting, sales, and value-added incentives.**

Use price reduction to close a deal, not to initiate a sale. Lower prices do not permit promotional strategies.

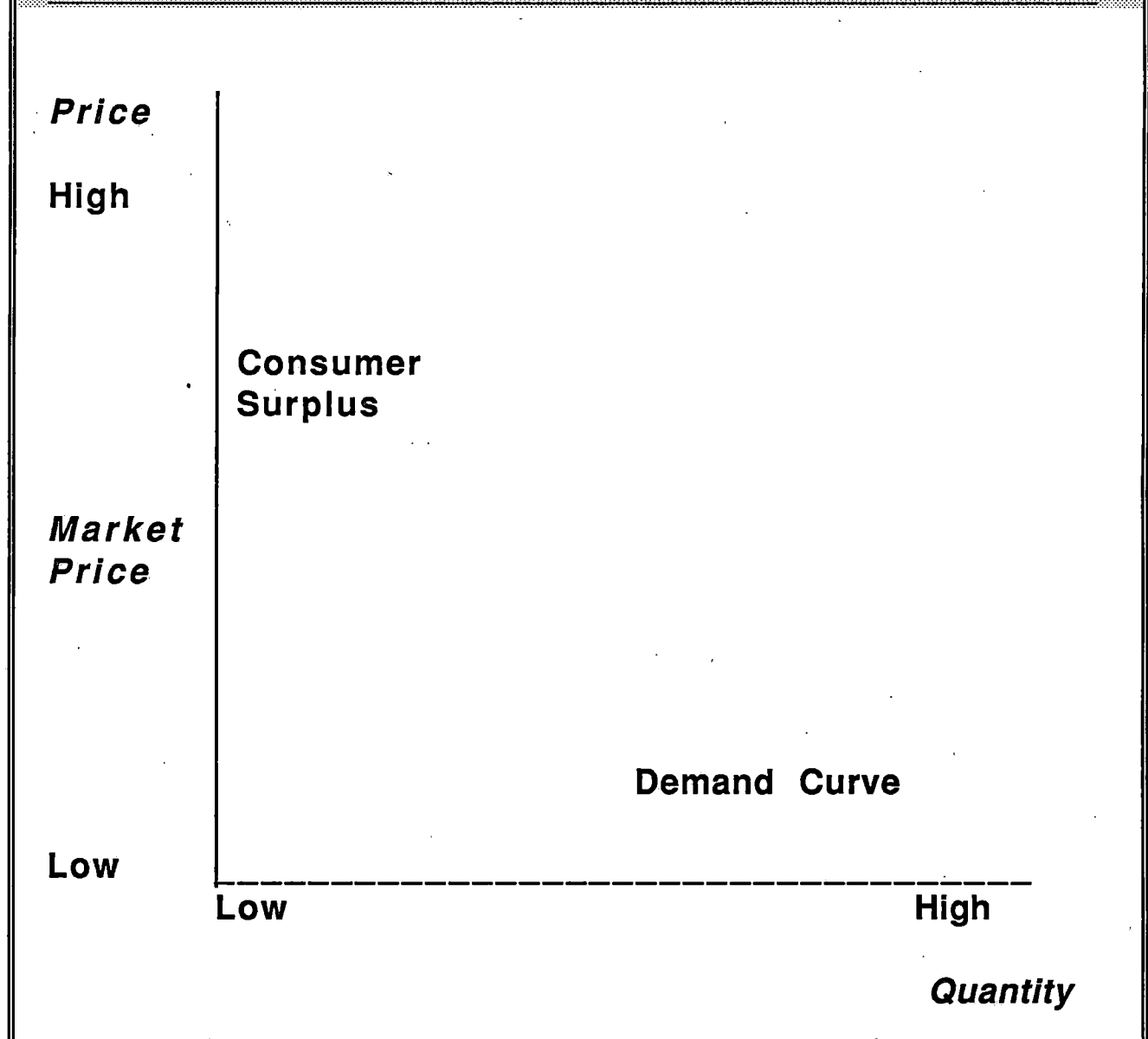
**4. It is easier to lower a price than to raise a price.**

**5. Costs may be harder to control than price.**

**6. If you are losing money and you lower your price, you may just lose even more.**

When you don't have enough customers, price may not be the problem: go back to the other four Ps.

**Consumer Surplus:**  
*Some people would pay more,  
if only given a chance!*



## **Alternative pricing methods!**

### **1. Should the price be bundled or unbundled?**

- What will be the price for the **bundled**?
- What will be the price for the **unbundled**?
- What will be your **core service/s**?
- What will be your **ancillary service/s**?
- Should the **core be the most expensive**?
- Should the **core be the least expensive**?
- Will you have a **single price with value-added options**?

*It depends upon the customer!*

### **2. How should you price your services?**

- Should you **price by the hour**?

*How many cases will you need to get the hours you need? Is this a nickel and dime strategy?*

- Should you price by **unit of service**?  
*“Tough cases” means tough prices.  
Vary your price by intervention criteria?*
- Should you price by **service contract**?  
*Paying for time...whether used or unused.*
- Should you price by **performance**?  
*Pay for results! How could they say no?*
- Should you price by **how much you save**?  
*Can you quantify it? Do you have proof?*
- Should you have both a **wholesale and a retail price**?  
*More should cost less. The goal should be to have fewer customers and more sales.*
- Should prices **vary by customer**?  
*Some customers have a high initial cost, but also a high life time value. How much profit will you forsake in the shorter term to reap the profit of the future?*

***It depends upon the customer!***

# **Price!**

*Increasing the value and lowering the costs.*

1. *What are the three things you will remember most about our discussion on pricing?*
  - (1)
  - (2)
  - (3)
2. *What will be you do to lower your customer's costs?*
3. *What will you do to increase your customer's value?*
4. *How will you set your price?*
5. *What will you charge?*

***Marketing  
for Results!***

**Promotion:**

***Making the most of  
market, motivation,  
message, and media.***

***Make Ms Mean  
Marketing Magic!***

**1. *M*arket**

**2. *M*otivation**

**3. *M*essage**

**4. *M*ethod**

**and *M*edia**

# Promotion!

## ***3 things to remember about promotion...***

### ***1. Repetition = Recollection***

The United States has 6% of the world's population and 82% of the world's advertising---it is communication overload for most people. So...people learn to block it out, unless said over and over again. Market research has shown that someone must hear a message at least 5 to 7 times before there is recall.

### ***2. Variety of Media = Even Greater Recollection***

Each of us has a communication method that is our preference for taking in information: Some of us like to read about it: some of us like to talk about it: some of us like to have it told to us; and on and on. By using many methods of communication, over and over, you not only accomplish repetition, but also will be more likely to hit the target's preferred communication style.

### ***3. More than One Communication Method = Synergism for Recollection***

1 + 1 = 3!

*Promotion is...*

***Selling the  
benefits,  
not the  
features!***

**Features**

***focus on you!***

*How you do it; how your agency operates and its structure; and anything that does not tell the target what's in it for him/her.*

**Benefits**

***focus on the customer!***

*Solve the target's problem/s; answer the target's wants and aspirations; and bring him/her personal satisfaction and gain.*

***Telling your customers what they will get!***

**11 tips  
for even more  
effective  
benefit statements!**

**1. Use the "So What?" test.**

Always ask...Who cares? What will the customer get? Don't focus on the activity or the process. Focus on the outcomes, the results.

**2. Talk and write with plenty of "You's".**

Nobody cares what *"we provide"*.  
You always care about what *"you get."*

**3. Explain what people *will gain*.  
But, also explain what *will not be lost*.**

Sometimes, the best benefit talks about what will be saved...time, money, risk, esteem, and others.

## **11 benefit tips...**

### **4. Go for the *emotional benefit*, as well as the logical reasons.**

Most of us buy with our hearts...and then look for a way for our brain to say yes.

### **5. Use *short, easy to understand words*.**

Talk like people talk. No jargon. Telegraph your message. Three and four letter words are best. Short sentences are better.

### **6. *Action verbs* are best!**

Passive verbs are dull. *Get*...instead of provide. *Discover*...instead of learn. Put excitement in your language.

### **7. *Adjectives and adverbs* give an even better picture of the benefits.**

On a menu, it is not just "*ham*"...it is "*Virginia-baked, honey-glazed, mouth-watering, ham*." Good benefit statements have a liberal dose of modifiers. Always, put the gravy on the meat.

### **8. *Never deny the customer's esteem and current satisfaction; build on it.***

If you say, "you can have clean dishes", customers must admit that their dishes are not clean; if you say, "you can have *even* cleaner dishes", the customer can buy the product, without a loss of esteem. Use words, like "even more", "even better", "...er's", and "...est's. Talk and write with superlatives.

## ***11 benefit tips...***

### **9. *Pile the benefits on!* *Link them for a one-two punch!***

When benefit phrases are put together, they have even greater effectiveness. For example, think about this one-two punch: "You *will get* a value of \$236, *and save* over \$50 on the regular price." Think about stating the reverse, and linking gain, with what will not be lost.

### **10. *Be certain about the benefits.* *Tentative does not sell.***

Is there a difference between: (1) "You *could* feel better after the open heart surgery." and, (2) "You *will* feel even better after the open heart surgery."? Never promise what you cannot deliver, but if you are sure, be sure. People like certainty in their benefits. Be careful of words like, "might", "may", "can", "could", "try", and similar hedges...the customers will hear that you are not sure---so, why should they take the risk? One exception to this rule is when you are selling "exclusiveness"; see tip eleven.

### **11. *Pump up the benefits by communicating value.***

Put a dollar and cent value on the gain, or what will not be lost. Tell what will not have to be spent. Another way to communicate value is by stating exclusiveness...when told not everyone can have it, you want it even more. (For example, "just for you,"; "you could be one of the few who may be able to get." Notice how the tentativeness increases value here?)

***Your Service's  
Features and Benefits***

<b>Features</b>	<b>Benefits</b>
1.	
2.	
3.	

***Promoting in person...  
Building and managing relationships!***

***Relationship management is...***

1. Building credibility and developing rapport.
2. Being a consultant that solves your target's problem and not being just a salesperson.
3. Helping your target, even if there is no immediate gain.
4. Shaping your offering to solve the target's problems.
5. Focusing on satisfaction... not sales.

## ***2 Major Musts!***

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# **Credibility *and* Rapport**

Credibility is being trusted and respected.

Rapport is being liked and enjoyed.

You must have both!

---

***How do you establish both of these during your first visit?***

***Which one is the best entry for the first meeting?***

***Is it easier to move from credibility to rapport...or rapport to credibility?***

***How does the relative importance between the two change during the three phases of becoming a customer?***

# *Planning for your first contact...*

## ***Your before-you-make-the-appointment checklist...***

- \_\_\_ Obtain and read any printed materials available on the company, such as annual reports and product brochures.
- \_\_\_ Contact everyone you know to get a personal introduction.
- \_\_\_ Find employees who currently work there to ask about the business, the person with whom you will meet, and corporate culture.

## ***Your making-the-appointment checklist...***

- \_\_\_ Write a letter of introduction, before you telephone.  
  
(Make the letter brief: Ask for a short meeting of no more than 30 minutes. If it is an information-gathering visit, state the purpose is to learn about the company, its current policies and programs, and the company's experiences with services like yours.)
- \_\_\_ When you call, tell the secretary that you are following-up on the letter. (Get the secretary's name and build rapport with him/her.)
- \_\_\_ When you telephone your contact, ask if it is a convenient time to talk.
- \_\_\_ Promise that the phone call will take no more than 5 minutes and ask for a meeting of no more than 30 minutes (at your contact's convenience).

- \_\_\_ State (in the first few moments of the phone call) why you decided to contact that person and that business; if you were referred, make sure you open with who told you to call.
- \_\_\_ Restate the purpose of the meeting. (Even if it is a promotion visit, make sure you don't say that the purpose of the meeting is to tell the business about your program; say instead, you want to see if your program can help the business and its employees.)
- \_\_\_ If time permits, confirm the meeting after the phone call with a brief note thanking your contact for giving you the chance to meet, and stating that you are looking forward to learning about the company.

***Your just-before-the-meeting checklist...***

- \_\_\_ Make a list of the 3 most important things you want to find out.
- \_\_\_ Decide what is the best way to dress for the meeting.
- \_\_\_ Pack your brief case: business cards; program materials; and, a pad for taking notes; a product and service list; a list of any previous customers; a list of satisfied customer quotes.
- \_\_\_ Leave on-time, to be on-time...with a few minutes to spare. (Use any extra time before the meeting to build rapport with the secretary, and observe the telltale signs of the culture.)

***What do you think is important before you meet with a prospect for your services?***

### ***3 must-have marketing tools!***

1. A specific list of current and past customers.
2. Satisfied customer quotes and/or testimonial letters.
3. A list of services available (bundled and unbundled).

- These three tools are simply typed, scannable lists printed on your letterhead.
- Increase value perception by putting all of them in a file folder.
- These lists will seem fresh (and ever growing) if you put a date on them.
- When you present them, handle them with care and walk your potential customer through them.

***Get credibility! Use specifics!***

## ***At the first meeting...***

1. **Establish credibility and develop rapport.**
2. Open by **asking questions** about the target and his/her business and their policies.
3. **Listen** carefully and see if you can help. If you can, help even if there is no immediate gain.
4. Tell how you and your service **may be able to help.**
5. Establish a **reason for follow-up.** *Any* reason to maintain future contact routes! (For example: Promise to send a copy of an article s/he may find interesting.)
6. Leave a **tangible reminder** of the visit. (A brochure, fact sheets, or a publication with your name stamped on it.)
7. **Record** what you learned immediately after the meeting.
8. **Send a follow-up letter immediately:** thank them for the meeting; summarize what you heard; how you can help and the next steps. Take the lead in follow-up. Follow-up frequently and---for best bets---forever!

### **Do you have a *business card for businesses?***

The wonderful thing about business cards is that **you can be just about anybody you want for \$14.95.** By simply changing your title and/or changing your tag line, you can communicate credibility and an inherent benefit.

**Task One:**

**Describe your services in one sentence  
(using the lead benefit to your target customer):**

**Task Two:**

**The four most important things you want to  
communicate about your services:**

1.

2.

3.

4.

# **79 weapons** **in your communications arsenal!**

1. Door-to-Door Canvassing
2. Door Knob Cards
3. Leaflets
4. Post Cards
5. Personal Letters
6. Direct Mail
7. Thank You Notes
8. Personal Telephone Calls
9. Telemarketing
10. Circulars/Brochures
11. Classified Ads
12. Display Ads

## **79 communication weapons...**

13. Publications/Reports
14. Annual Reports
15. Newspaper Supplements/Free-Standing Inserts
16. News Stories
17. Feature Stories
18. Radio Ads
19. Radio Talk Show Appearances
20. Radio Interviews
21. Billboards
22. Transit Posters
23. Bench Posters
24. Agency Building Sign
25. White Page Listing/s
26. Yellow Page Listing/s

## **79 communication weapons...**

27. Listing in Directories
28. Penny-Saver Ads
29. Ads in Free TV Guides
30. Regional/Local Magazines
31. Other Organization's Newsletters
32. Premium/Advertising Specialties
33. INFOmercials (no/low cost seminars and consultations)
34. Trade Shows
35. Exhibits
36. Booths at Shopping Malls
37. Booths at Fairs/Community Events
38. Sponsorships
39. Personal Contact through Joining Organizations
40. Booths in Stores

## **79 communication weapons...**

41. Business Cards
42. T-Shirts
43. Sandwich-Board Signs
44. Place Mats
45. Restaurant Tent Cards
46. Point-of-Purchase Displays
47. Slide Shows
48. Video Tapes
49. Cassette Recordings
50. Buttons
51. Posters on Community Bulletin Boards
52. Rolodex Cards
53. Window Displays
54. Open Houses

## **79 communication weapons...**

55. Cable TV Ads
56. Call Board Listings
57. TV Talk Shows
58. TV Feature Stories
59. Tag-along Inserts in Mailings of Others
60. Silent Radio
61. Telephone Hotlines
62. Recorded Telephone Messages
63. Windshield Flyers
64. Postage meters
65. Movie Theater Announcements
66. Letterhead
67. Name Badges
68. Awards and Certificates

## **79 communication weapons...**

- 69. Speaking Engagements at Clubs and Events
- 70. Bumper Stickers
- 71. Proclamations
- 72. Balloons
- 73. Agency forms
- 74. Checks
- 75. Take-One Boxes
- 76. Catalogs of Offerings
- 77. Flea Market Booths
- 78. Research Studies
- 79. Columns in Newspapers or Publications

***How many do you use?***

## ***Choosing from the communications arsenal!***

1. Which communicates best with your target market?
2. Which have you used in the past with success?
3. Which have you tried with no/low results?
4. Which are the best for initiating contacts?
5. Which are best for closing sales?
6. Which are best for maintaining contact, managing the relationship, and seeking repeat business?

## ***Differences in materials for sphere of influence marketing and geographic area marketing...***

<b>Marketing Materials for Geographic Area</b> <i>People I don't know...</i>	<b>Marketing Materials for Sphere of Influence</b> <i>People I know...</i>
1. Formal	1. Informal
2. Credibility	2. Rapport
3. Personable	3. Personal
4. Target Market	4. Target Person
5. General Benefits	5. Tailored Benefits
6. General Situations	6. Specific Situation
7. Print and Oral Media	7. Oral and Print Media

***Which are best for your target market?***

## **Promoting to professionals who hate advertising**

*The higher our education, the more likely we are to believe we are not affected by advertising and tend to see it as having low credibility. Especially in many social service agencies and medical settings, professionals can potentially be turned-off by promotions that are seen as too flashy, too hard-sell, and too cute.*

*Since these well-educated professionals are often the best source for referrals, the marketing materials and methods used to reach them must often be disguised and packaged as professional participation and development activities in order to be effective.*

*Consider using these traditional social service and professional network methods as a subtle means of promoting your program:*

1. Arrange, host, and/or conduct **educational sessions** on working with people with disabilities, new research, effective case management methods, and other such professional development topics. (Remember, the event's publicity promotes your services, whether they attend or not.)

If possible (and your site is attractive), hold these *infomercials* at your location. Make sure your agency's name and phone number is on every piece of material distribute. You will be able to attract higher attendance, if you arrange for Continuing Education Units to be awarded, since many professionals need them for licensing.

When you ask a desired referral source professional to be a speaker at your conference or educational session, you bond them to your organization through the compliment.

Consider asking targeted referral sources to co-sponsor the event, which may include them making a real contribution or simply listing their names as co-sponsors. We support what we feel a part of.

2. Think about conducting **one-on-one interviews** with targeted professionals who are potentially high value referral sources to seek their advice on solving problems you confront. *(Of course, you will have to explain your program in order for them to be able to provide the "needed" consultation.)*
3. Hold a "**focus group**" with a group of targeted professionals to seek their opinions on disability-related and service-related topics. You will gain potentially useful insights to improve your services, but you will also get the chance to present them with information on your services.
4. Ask them to serve as a member of a "**quality review team**" to examine your service delivery methods and make recommendations for improvement. Ask if they would be willing to have their organization or agency included on a list of those who recommend your service.
5. Sponsor a **community needs assessment** and survey referral sources by mail on their opinions and insights. When the surveys have been received and tabulated, do a one page summary of the results and mail the findings to all referral sources, whether they responded to the survey or not.
6. Request that they serve as a member of your program's **advisory committee**, whose advice is sought and desired on important issues. This advice can be sought on an ad-hoc basis and the committee never has to formally meet if you (and they) do not choose to do so. (If you wish, put their names on your letterhead to gain a positive-image rub-off and to build identity through affiliation with their organization.)

# **When you make a presentation to motivate use of your services...**

## **Use INFOmercials!**

An INFOmercial is a verbal presentation that provides useful information to the listener. It builds credibility through providing information.

Don't describe your organization or services directly. Promote your services indirectly!

**Save the pitch to the end!**

## **Use ADvertorials!**

An ADvertorial is a written presentation of useful information.

It presents your services as one of the solutions to the problem to be solved.

Make sure your name and phone number is on every page.

**Ten tips and tactics for getting the most from business club presentations.**

1. **Seek pre-meeting promotion.** Use newsletters, press releases, mailings, announcements, personal invitations.
2. **Try to talk before lunch...but be brief.** Full stomachs... and the clanging of dishes being removed are challenges.
3. **Have a member of the group introduce you** that has had experience with you and your program.
4. **Don't just make a speech.** Use group participation. Quizzes. Buzz groups. Open-ended questions.
5. **Use success stories.**
6. **Use pass-outs and give tangible reminders.**
7. **Put business cards on every table.**
8. **Collect names.** Follow-up quickly.
9. **Send a thank you note to the sponsor.**
10. **Seek post-meeting promotion.** Releases in organization media and general media. Get a mailing list for a follow-up reinforcement of the message.

# How to make direct mail work for you!

## **1. The envelope...**

- Make it personal if the target will be opening it: use a real stamp; no label; no agency name.
- If you must use a label and a meter, you might as well use a teaser on the envelope.
- The goal of both: get it opened!

## **2. In the envelope..**

- Use the full ounce.
- Give people a choice of where to stop.
- Always have a letter.
- Use enclosures. The more pieces you enclose the more likely one will be read. Enclose: a brochure; a business card; a flyer; a newspaper clipping; a personal note; an off-size special offer.

### **3. The letter...**

- Use the power points: the first paragraph, the last paragraph, and the P.S. (People often read backwards!)
- The first paragraph is very important: Grab attention. Focus on the customer. Short sentences. Short paragraph. (You have just a few seconds!)
- Make it personal: a comma after the name; you's and I; repeat the name in the body; jot a note; use a post-em; hand-sign (in blue ink).
- Make it easy to read. People scan. Break it into many pieces when very long Use bullets, indentations, numbered lists, headlines, and plenty of white space.
- Length is not as important as ease of reading.
- Continue the reader to the next page... never make it easy to stop.
- Ask questions. Use involvement devices.
- Be clear what you want the reader to do!
- Give the reader a reason to respond immediately.
- ***P. S. Always use a P. S.***

#### ***Three more tips:***

1. Read the "direct mail" seminar in your mail every day.
2. Get on every product-related mailing list possible.
3. Start a "swipe file" of the best!

# ***The 10 most common brochure mistakes!***

1. Target is unclear.
2. Attempts to target everyone.
3. Purpose is unclear and outcome undefined.
4. Focus is on the agency, and not the target.
5. Sells the features, and not the benefits.
6. Use of "we provide" copy, instead of "you get" copy.
7. Cover doesn't show the target, define the problem to be solved, or offer a solution.
8. Doesn't talk like the target talks.
9. Not scannable.
10. No call for action.

# copy tips!

## 1. Start with...and end with the reader!

- Use your customer profile statement. As you write, think more about who the reader is (and his/her interest and hot buttons) than you do your product and services.

## 2. Keep your message organized!

- Be consistent in format. Consistency provides continuity and makes your copy easier to read.
- Put the most important information first or last. People tend to skip over what's in between.
- Choose the most important point... and stress it again and again. Repetition is the key to recollection. When you have too many major points, you are developing competition for attention within your marketing materials.
- Sequence your information logically.
- Make your information easy to scan. People rarely read every word.

# ***copy tips!***

## **3. Make sure you are understood!**

- Use short, non-technical words of two syllables or less.
- Use live, active verbs.
- Talk like your customer talks. This is not an essay for your high school English teacher. It is not to impress... but to motivate and be understood.
- Use positive language.

## **4. Make your sentences short!**

- Sentences should average 8 to 10 words. Short sentences sell!
- Asking questions to emphasize a point is a good technique. Don't you think so?
- Marketing copy can have "sentences" without a verb.

# ***copy tips!***

## **5. Make your paragraphs short!**

- Four sentences should be the maximum paragraph length.
- Varying the length of paragraphs makes it more interesting for the eye.
- Sometimes, one sentence paragraphs are the most powerful.
- If there are many paragraphs, make sure you use headings.

## **6. Use headings to capture important benefits!**

- Use them. They break up the copy. Provide white space. Make it easy to scan.
- Put information into the headings--- sometimes, they will be the only thing read.
- Questions can make effective headings.

# ***copy tips!***

## **7. Communicate with graphics and photos!**

- Put the picture with the related text.
- Always, use a caption under a photo. Readership of photo captions is very high.
- Use graphics that relate to the life experience of the reader. Make sure the reader can see his or herself in the picture.

## **8. Layout makes a difference!**

- Remember; The top of the page counts. The bottom of the page counts. The eye typically moves from top...to bottom...to about 1/3 of the way down the page.
- Move upward...and rightward with graphics. Pictures with people, should have them looking toward the right. Pull people to the next page with their eyes.
- A headline, a graphic, or something interesting in each 1/4 of the page.

# *copy tips!*

## **9. Make it easy to read with the right type face!**

- Nothing smaller than 12 points! (This is 14 points.)
- *Italics increases reading difficulty.*
- Use both upper and lower case lettering together.  
LETTERING IN ALL CAPITALS IS VERY HARD TO READ.

## **10. Make it visually attractive!**

- Lots of white space. Generous margins.
- Use bullets. Lists. Asterisks. Arrows.  
Anything that guides the eye and makes it easy to scan.  
These devices lead people to the next point.

- Use boxes. Make it stand out.

- Justified margins makes it harder to read.
- Columns should not be too wide. Or too short.
- Indenting paragraphs can sometimes make it easier to read.

# ***copy tips!***

## **11. Test your copy with your market!**

- Focus groups can help.
- Past customers can help.
- Ask those who you are targeting if it motivates them.

***After reviewing this list, what changes might you want to make in your current brochures and materials?***

1.

2.

3.

4.

5.

6.

# **More brochure hints!**

1. Get people involved. Urge them to write on it.
2. Distribution and presentation is just as important, as the brochure copy and design.
3. Always key for response. See if it is working.
4. Start a swipe file.
5. Photocopy newspaper articles. Sometimes, this is even better than a brochure.
6. Put the selling message on the cover.
7. Remember the power points on the brochure:  
#1: The Cover.  
#2: The Back.
8. Have a clear call to action. Tell them what to do next.
9. Put a name before the phone number to increase response.

## **9 strategies to get credibility!**

1. Use numbers.
2. Use dollars.
3. Use specifics.
4. Use lists.
5. Use quotes.
6. Use success stories.
7. Use pictures of peers.
8. Use guarantees.
9. Use your credentials

# ***Personal Action Planning!***

***1. What will you keep doing?***

***2. What will you start doing?***

***3. What will you stop doing?***

***4. What will you think more about?***