

## Program Marketing

No matter what kind of program you are putting on, marketing your program is essential to its success. Three main reasons why marketing is conducted are:

- Ensure adequate participation.
- Communicate what the program is about.
- Convince other publics that the topics are important.

When developing a marketing strategy, the instructional designer or program planner should consider the following:

- Develop and maintain credibility.
- Build on successes.
- Know the competition.
- Find a market niche.

What do each of these look like when a program is developed for in-house use?

A significant factor in long-term program success is to know the place in which you conduct education. Whether you are conducting education that is open to anyone or closed to a specific group, one thing that really matters to people is having a customer (or participant) orientation. People like to feel like they are important and their opinions and ideas count. To take advantage of this, one has to understand the people with which they are dealing. Some ideas include:

- Track all topics requested, even when they are out of the usual scope of programs offered.
- Monitor websites and listservs whose audience is similar to those served by your organization.
- Make contacts in person, via the phone, or on the Web to ask about how these contacts might promote a particular program.
- Conduct focus groups composed of a diversity of former and potential participants to ask them what kinds of marketing campaigns they find useful and which turns them off.
- Use task forces and advisory groups to assist in designing and conducting marketing endeavors.
- Organize community forums when launching new programs that affect all or large segments of the community.

In addition to the people that may be participants, don't forget about the context in which they exist. Understanding the organization or community where potential participant are

associated with will give you rich information about the viability of your program and chances for success. Questions to consider include:

- Who else in the participants' public or private sphere might need "to be sold" on the value and worth of the program?  
EX: supervisors, senior management, family, friends
- What types of promotional materials would most likely capture potential participants' attention?  
EX: copy, pictures, format
- What organizational factors should be highlighted to attract potential participants into the program?  
EX: values, beliefs, assumptions, team versus individual orientation
- Are their wider environmental factors related to the program content that might influence potential participants to attend?  
EX: geographic distribution, funding, time of year
- How might the idea that a well designed transfer plan incorporated into the program be influential?  
EX: fitting the context where participants will apply their new knowledge and skill

Four key aspects of marketing your program include:

- Product  
Provide a comprehensive and understandable description of the program.
- Price  
Consider a price that will consider the actual cost of planning and implementing the program, demand for the program, what potential participants will pay, the competition, and the life cycle of the program. **OPPORTUNITY COST**
- Place  
The location of the program must be consistent with the program design, audience, and budget.
- Promotion  
Not all programs are promoted; some are required of the participants to attend. You still have to sell the program to potential participants. Promotion involves developing strategies and materials aimed at generating or increasing enrollments.

## Examples of Promotional Materials and Strategies

Materials	Strategies
Brochures/flyers	<ul style="list-style-type: none"> <li>• Direct mail</li> <li>• Placement in appropriate places</li> <li>• Participant packages</li> <li>• Distribution at meetings</li> <li>• Bulletin boards</li> </ul>
Email	<ul style="list-style-type: none"> <li>• Internal organizational email</li> <li>• Communication networks/social media</li> </ul>
Website	<ul style="list-style-type: none"> <li>• Internal organizational websites</li> <li>• Websites on the Internet</li> </ul>
Form letters/memoranda	<ul style="list-style-type: none"> <li>• Direct mail</li> </ul>
Newspaper/newsletter	<ul style="list-style-type: none"> <li>• Distribution throughout organization</li> <li>• Bulletin board</li> </ul>
Postcards	<ul style="list-style-type: none"> <li>• Direct mail</li> <li>• Participant packets</li> </ul>
Catalogues	<ul style="list-style-type: none"> <li>• Direct mail</li> <li>• Placement in appropriate places</li> <li>• Distribution at meetings</li> </ul>
Posters	<ul style="list-style-type: none"> <li>• Bulletin boards</li> <li>• Key locations throughout organization</li> </ul>
Personal contacts	<ul style="list-style-type: none"> <li>• Conversations via: in person, telephone, or email</li> <li>• Announcements at group meetings</li> </ul>

## **Ideas for Preparing Good Promotional Media**

- ✓ Keep the intended audience's interests, experiences, backgrounds, and context in which they live and work at the forefront.
- ✓ Keep it simple! Use short sentences, familiar words, and clear images.
- ✓ Ensure images match and illuminate the text.
- ✓ Use the present tense
- ✓ Use action words and images give the message a sense of urgency.
- ✓ Use personal pronouns and images to which the audience responds.
- ✓ "Speak" to the audience just as you would to a colleague or friend.
- ✓ Do not use jargon.
- ✓ Do not over use or crowd images.
- ✓ Emphasize the benefits of how what they will learn they will be able to use.
- ✓ Convey enthusiasm to convince the potential participant to share your excitement.

When conducting marketing campaigns, it is helpful to track and evaluate your efforts. Keep documents of your strategies and periodically review these records to identify improvements. Ask yourself:

- How did the participants (and organizations and groups from which they came) learn about the program?
- What factors were most influential in their decision to participate?

## Scheduling Considerations

As you think about your continuing education course and the myriad of factors you need to consider, don't forget about schedule related issues during the planning process. Unless you have an unlimited budget, you will need to schedule scarce resources into small time frames; this can be a daunting task at times. Some things to carefully consider include:

- Target audience prior commitments.
- Organization workload (especially peak workload times).
- Family responsibilities.
- Religious celebrations.
- Personal/job schedules.
- Travel time and travel means.
- Resource availability.
- Instructor availability.
- Registration time.
- Holidays/vacations.

What are some specific scheduling considerations you have regarding your continuing education and context?

Even the best laid plans can have problems. To be prepared, consider the following:

- Less than expected enrollment – scaling back.
- Ability to change program format.
- Instructor pay.
- Program resources (idle resources).
- Reassignment of internal staff.
- Notifying registrants.
- Refunds of tuition.
- Rescheduling mandatory education.
- Incurred travel expenses.
- Facility costs.

## Key Terms in Education Budgeting

### Income and expense budget

Income – the monies generated as a result of the education (i.e., registration fees, tuition, etc.).

Expenses – the actual costs of conducting the education (i.e., development, equipment depreciation, supplies, printing, etc.).

### Direct and indirect expenses

Direct – the out-of-pocket expenses that support specific program activities (i.e., instructors' salaries, travel costs, instructional materials, etc.).

Indirect – the not directly attributable to the education itself, but are necessary to maintain the program as a whole; overhead (i.e., space, utilities, management and administrative support, payroll and accounting services, benefits, etc.).

### Fixed and variable expenses

Fix – the items that usually remain stable no matter the number of participants or if the education took place at all (i.e., marketing, initial development, etc.).

Variable – the items that typically change depending on specific program requirements and the number of participants (i.e., materials, supplies, meals, etc.).

### Profit

The monies left over after all expenses are paid.

### Return on investment (ROI)

A ratio that is calculated of the costs to the benefits expressed as a percentage of return. Positive ratio is good; negative ratio is bad (unable to justify the costs associated with the education).

### Cost-benefit analysis

The cost of education is related to the benefits they produce spelled out in monetary terms to demonstrate the viability and efficiency of a program. Is the education worth the investment?

## **Considering Your Program's Finances**

For your continuing education program, list as many of the following as possible:

**Direct costs**

**Indirect costs**

**Fixed expenses**

**Variable expenses**

## Ideas for Computing Participant Costs<sup>1</sup>

For your continuing education program, here are some suggestions to help you determine certain costs associated with education program development and implementation:

- ✓ Salary: Number of participants (by pay group) x median salary x hours/days of educational programming.
- ✓ Benefits: Number of participants x hourly fringe benefit charges x hours/day.
- ✓ Travel: Total from expense reports (or median costs x number of participants).
- ✓ Per diem: Total from expense reports (or median allowance x number of participants x number of days).
- ✓ Materials: Material costs x number of participants.
- ✓ Participant replacement costs: Number of hours x median salary.
- ✓ Lost productivity of participants: Value per unit x number of lost units (or value per unit x the reduced production)

In determining the financial impact of your program, you must consider your organization's policies. Some, none, or all of the previous financial concerns may be required by your organization. At the very least, it *will* be something that is taken into consideration when making decisions about education efforts.

The more you plan and the more detailed the information you present, there is a better chance of supporting your claim of need for your proposed continuing education.

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<sup>1</sup> Laird, D. (1985). *Approaches to training and development* (2<sup>nd</sup> ed.). Reading, MA: Addison-Wesley.  
Watkins, W. E., & Sechrest, T. L. (1998). Adding value: Program financing for program planners. In P. S. Cookson (Ed.), *Program planning for the training and continuing education of adults: North American perspectives*. Malabar, FL: Krieger.

## Depreciating Equipment

Determining how much it costs to use a piece of equipment during your education program is not as difficult as it may seem. There are only a few pieces of information you need and there are some assumptions that have to be made.

The data you need to make a good estimate are:

- Total equipment purchase costs  
This includes the equipment, taxes, and shipping expenses.
- Median maintenance costs  
An assumption has to be made here, unless you keep meticulous records – how much does it cost for me to maintain this piece of equipment?  
(Median = highest – lowest ÷ 2)
- Salvage value  
Another assumption has to be made here – how much could I get for this piece of equipment if I could sell it (or value as a charitable donation)?
- Life expectancy  
Another assumption, but a good estimate can be made relatively easily – how long will this piece of equipment last under normal use?

With these data, you can calculate how much each piece of equipment costs to use during education. Let's look at the following example:

Cardiac monitor used in a 4-hour continuing education program;

Purchase costs:	\$ 25,000
Maintenance costs:	\$ 150
Salvage value	\$ 5,000
Life expectancy	10 years

First – calculate the depreciation per year using a straight-line depreciation method:

$$\text{Purchase cost} - \text{salvage value} = \$ 20,000 \text{ (total depreciation)}$$

$$\text{Total depreciation} \div \text{life expectancy} (\$ 20,000 \div 10 \text{ years}) = 2,000/\text{year}$$

Second – calculate total cost per year by adding the maintenance costs:

$$\text{Annual depreciation} + \text{maintenance costs} = (\$ 2,000 + \$ 150) = \$ 2,150$$

Third – calculate total cost per day (assuming an 8-hour day) by dividing the total annual cost by 365:

$$\text{Total annual cost} \div 365 = (\$ 2,150 \div 365) = \$ 5.89$$

For courses that are fractions of a day, make the necessary adjustments. In our example, this would be  $\frac{1}{2}$  of the daily cost for our 4-hour course:

$$\text{Total daily cost} \div 2 = (\$ 5.89 \div 2) = \$ 2.95$$

Let's further say that we have a total of 3 similar monitors for each course session:

$$\text{Total daily cost} \times 3 = (\$ 2.95 \times 3) = \$ 8.85$$

Now we have a very accurate estimate of how much the use of all equipment is for each session we conduct. If we do this for each piece of equipment we use, we will have a much more realistic idea of the *actual* cost of the course. Include all direct and indirect labor and materials costs and we will have the most realistic cost estimate possible and can use this data to manage our programs more effectively.

## Strategies to Reduce Education Costs<sup>2</sup>

- Substitute less expensive instructional materials or eliminate certain materials altogether.
- Reduce the number of staff members who plan, deliver, and/or evaluate the program. Be especially cognizant of the cost of outside consultants.
- Reduce the number of participants.
- Employ less expensive learning format(s) and/or techniques so that the same number of participants (or more) can be involved.
- Use either a less expensive facility or one that does not cost direct dollars.
- Hold the program at a facility close to where the participants live and/or work so they do not have to pay for overnight accommodations.
- Have participants pay for their own meals rather than including meals as part of the program package.
- Require that the participants find the cheapest mode of travel to and from the program.
- Change the program to a date when the prices for the facilities, meals, and so forth are lower.
- Make promotional material for the program less elaborate.
- Shorten the program and tighten the design.
- Use a lending library of materials rather than producing all the materials for the participants.
- Take the program to the participants rather than gathering the participants at a different site if it costs less to deliver the program.
- Consider subcontracting some of the programs if the costs are lower.

Other ideas?

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<sup>2</sup> Caffarella, R. S. (2002). *Planning programs for adult learners: A practical guide for educators, trainers, and staff developers*. San Francisco: Jossey-Bass.

## Estimating Program Expenses Worksheet

Budget Item	Development Cost	Delivery Cost	Evaluation Cost
<b>Internal Staff</b>			
Program planners	\$ _____	\$ _____	\$ _____
Instructors	\$ _____	\$ _____	\$ _____
IT Specialists	\$ _____	\$ _____	\$ _____
Support staff	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>External Staff</b>			
Program consultants	\$ _____	\$ _____	\$ _____
Instructors	\$ _____	\$ _____	\$ _____
IT Specialists	\$ _____	\$ _____	\$ _____
Support staff	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
<b>Instructional Materials</b>			
PowerPoint slides	\$ _____	\$ _____	\$ _____
Books and articles	\$ _____	\$ _____	\$ _____
Manuals	\$ _____	\$ _____	\$ _____
Videotapes/DVDs	\$ _____	\$ _____	\$ _____
Audiotapes/MP3s	\$ _____	\$ _____	\$ _____
Computer charges	\$ _____	\$ _____	\$ _____
Internet connectivity	\$ _____	\$ _____	\$ _____
Videoconferencing	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>

Budget Item	Development Cost	Delivery Cost	Evaluation Cost
<b>Facilities</b>			
Large meeting rooms	\$ _____	\$ _____	\$ _____
Break-out rooms	\$ _____	\$ _____	\$ _____
Staff lodging	\$ _____	\$ _____	\$ _____
Participant lodging	\$ _____	\$ _____	\$ _____
Parking	\$ _____	\$ _____	\$ _____
Signage	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	\$ _____	\$ _____	\$ _____
<b>Food</b>			
Catered meals	\$ _____	\$ _____	\$ _____
Special needs	\$ _____	\$ _____	\$ _____
Refreshments	\$ _____	\$ _____	\$ _____
Special functions	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	\$ _____	\$ _____	\$ _____
<b>Travel</b>			
Planning/Follow-up meetings	\$ _____	\$ _____	\$ _____
To and from program	\$ _____	\$ _____	\$ _____
Entertainment outings	\$ _____	\$ _____	\$ _____
Education outings	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	\$ _____	\$ _____	\$ _____
<b>Supplies</b>			
Notebooks	\$ _____	\$ _____	\$ _____
Printing	\$ _____	\$ _____	\$ _____
Moulage	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	\$ _____	\$ _____	\$ _____

