CONTRACT EDUCATION MARKET PLAN TOOL KIT

Prepared by the Learning Resources Network (LERN), the leading association in continuing and contract education. Founded in 1974 as a non-profit, LERN annually shares how-to practical *"Information That Works!"* ® to over 7,500 continuing and contract education professionals. For more information about LERN go to www.lern.org.

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Purpose of Contract Education Market Plan Tool Kit

The Contract Education Market Plan Tool Kit is for seasoned and beginning contract education staff desiring to better understand the role marketing plays in contract education and how to utilize contract education marketing best practices and resources, to better sell present and potential clients.

Including ten sections, the Contract Education Marketing Tool Kit covers the role of marketing in contract education, understanding your community, competitive analysis, marketing data collection and analysis, building your sales kit and website, lead generation, digital visibility, getting in the door, examples, and a market plan template.

Historically, contract education units have not had to market their services. The phones were always ringing and we had more work than we could handle. The landscape has changed and to grow our contract education units we have to be much more aggressive about selling, thus the need to be proactive about marketing.

The 4 P's of marketing are a great place to start and set a foundation for contract education marketing.

- Product. What does the client want from your product or service? What needs does it satisfy?
- Place. Where do clients look for or find out about your products and services? What do your competitors do, and how can you learn from that and/or differentiate?
- Price. What is the value of the product or service to your client? How will your price compare with your competitors and what your clients are willing to pay?
- Promotion. How do you communicate with and get your message across to present and potential clients? How is your message different from your competitors?

In contract education, you cannot close sales and grow contracts sold and revenue without a person selling. Marketing does not replace a person selling, but instead complements your selling efforts and generates visibility.

After reviewing the Contract Education Marketing Tool Kit, you will better understand the role of marketing in contract education and have a tool kit you can access as needed to help improve your marketing efforts.

Section 1: The Role of Marketing and Contract Education

Successful contract training units are reporting the increasing importance of marketing in growing contracts sold and revenue generated. To ensure they are staying on track with marketing efforts, they are building and following an annual contract education market plan.

While the course programming-side of your organization spends up to 15 percent of their budget on marketing, contract education spends five percent or less. The primary costs are a sales kit, a website or webpage, eMarketing and social media tools, and lead generation costs such as events. The cost of a salesperson or an inside salesperson is not a marketing cost; they are both administration costs.

The two primary purposes of contract education marketing are visibility and lead generation.

<u>Unique Selling Proposition</u>
Visibility requires you to be clear about your unique selling proposition or USP. Your USP is what your best clients' value most about you. It is what makes you unique; the benefits you provide. Your USP is not your products or services, but instead intangibles such as customer service, quality, and timeliness. You do not know what your USP is, thus you need to ask your clients.

To find out your USP take the following three steps:

Step 1. Along with your staff, brainstorm what you believe makes your contract education unit unique. Vote on the list and come up with your top three to seven reasons.

Step 2. Gather one or more client focus groups. If you are a small unit, then a focus group representing multiple industry sectors works. If you are larger, you may want to have focus groups by industry sector (thus you may end up with USPs by industry sectors). Have your focus groups(s) brainstorm what they believe makes your contract education unit unique. Have them vote on the list and come up with their top three to seven reasons.

Step 3. Share the list of reasons with all your active clients (as a group or by industry sector) and have them select their top two reasons. Tabulate and the reasons that rise to the top of the list make up your USP. Now compare the tabulated list to the list you as a staff generated. Any surprises?

Once you know your USP you may develop a slogan or just share as a list of benefits. It is important to be zealous and highlight your USP on your website, in your sales kit, when you are talking to present or potential clients, on the back of placards you use during training sessions, and make sure your presenters and consultants are clear about your USP.

Lead Generation

Lead generation will be covered in greater detail in Section 7 of the Contract Education Market Plan Tool Kit. While your visibility actions get you noticed, you still need to be proactive about generating and nurturing leads. Larger contract education units normally have an inside salesperson – a person dedicated to lead generation and nurturing. Typically, the inside salesperson is responsible for managing all marketing efforts. If you are a smaller contract education unit, a person on your team should have accountability for marketing.

The primary responsibilities of an inside salesperson are:

1. Manage all promotion efforts, such as eMarketing, social media, print, advertising, and any other ways you promote your contract education unit and/or specific products and services you are selling.
2. Generate leads by using promotion efforts, market and client research (finding similar clients), following up on client referrals, and holding events. Once leads are identified they need to be nurtured before they are handed off to the salesperson.
3. Where appropriate set up appointments for the salesperson.
4. Stay in contact with existing clients to help keep your contract education unit in the forefront when they consider training or any other services.

Five Marketing Best Practices

- Build trust with your leads. Serve up authentic messages that genuinely emphasize with your present and potential clients' pain and gain points and put the spotlight on the solution you offer.
- Speak your audience's language. You serve multiple industry sectors, so you need to be able to customize and target your message, whether it is your sales kit, social media post, or webpage.
- Share your expertise. By using case studies, blog posts, and testimonials, you can demonstrate your expertise. Your clients want to work with the best.
- Make realistic promises and over-deliver. Always respond faster, provide more, and in any way you can, surprise your present and potential clients.
- Always be interesting. Think about your USP and how you can make what makes you unique interesting. You need to stand out.

Section 2: Understanding Your Community

In order to serve a community, you have to understand it.

What does this mean? It means you will benefit from understanding the community's history and present state of commerce, industry, culture, economy and other factors. You'll need to familiarize yourself with the community demographics, too. You'll benefit by learning who the community business leaders are and what they are trying to accomplish.

It's vital to understand who makes up the community. Age, gender, education, number of people in household, first language – these and other statistics make up the demographic profile of the population of local employees and potential trainees for your programs.

Another useful thing to understand is the community's economics. Who are the major employers in the community? What, if any, business or industry is the community's base? Who, if anyone, exercises economic power and influence? What are the economic trends?

Knowing the governance of the community and its politics will help, too. Knowing the people in city and county or even state government will help create useful relationships. Understanding where the fulcrum of the local political power is will help you know where leads and partnerships can come from. Knowing how problems are solved in your community will also help you understand how and with whom you can collaborate and what the likely risks and opportunities are.

The more you can understand about community attitudes and values, the more you'll understand about what the community counts as important and how work is awarded inside the community. Each company and each industry will have sub-cultures and it will help to understand these as well, as you begin to create relationships and work opportunities inside those businesses. Understanding competition inside industries will help you keep from making costly mistakes.

Before you start developing marketing and sales campaigns and knocking on doors in person or digitally, it will be helpful to also understand the community's strengths and challenges. And before you begin to meet with potential clients, it's good to be generally apprised about whether a community is divided about an issue and about any community-level conflicts the issue has generated.

Understanding these things will help you know how to communicate, how to do needs assessments and how to sell and deliver training in the community. It will help guide you in pricing, and negotiating your prices for training, and other services, as well.

Occasionally, you must re-assess your sense of the communities you serve. If your community has had a serious change in economy, you'll need to re-evaluate. Economic downturns and upswings can affect entire workforces, families and individual employees and with a significant change in economy, a whole community can be uplifted or depressed.

Communities are complex and dynamic entities. New needs are constantly emerging and old ones will diminish in opportunity as needs are met. Understanding the community and intermittently refreshing your understanding will help you recognize the shifting needs and political and business landscape. You'll be able to look at current needs and create new plans and programs based on what's worked in the past and what will need to be changed, given the changes in the community. As the community changes, your purpose and your strategies will also have to change.

From whom do you get this information? Clients can tell you and so can elected officials, corporate leaders and leaders in local service clubs, since many of those members will be business-oriented people.

When you're trying to understand a community—especially if you are new to the community, be prepared to learn from the community you'll serve. Listen to what people say and assume you have a lot to learn. Talk to as many people from as many perspectives as possible—but remember that what people say may or may not be accurate—no matter who they are. Representatives from local government or Chamber of Commerce may be optimistic, for example, since they are charged with attracting new business to the community. Different leaders may exaggerate or downplay certain information to suit their own purposes. Protect yourself by getting information from as many sources as possible. Listen to local media. The local library may know certain kinds of information, as will educational leaders and citizens. Ask the people you talk to who they think you should talk to next.

What resources can you use to get even more information? Most communities have websites, and many public records are readily available. Your institution will have data from its own archives and from reports it uses for its work. Local government websites will also have labor reports and trends reports and databases. University and community college researchers may also have data.

In the US, most of this and other demographic information is available from the US Census, from state and local government websites, or from other government agencies. In other countries, there are, of course, equivalent agencies.

It's also helpful to know about the structure and operation of local government.

- Go to open meetings of the city council, town boards, board of selectmen, or other bodies, as well as to public forums on proposed actions, laws, and regulations. Such meetings will be announced in the local paper.
- Make an appointment to talk to one or more local government officials.
- Read the local newspapers often.

Get to know local institutions.

- Offices of local, state, and federal government agencies (Welfare, Dept. of Agriculture, Office of Immigration, etc.)
- Public libraries.
- Religious institutions. Churches, synagogues, mosques.
- Cultural institutions. Museums, theaters, concert halls, etc. and the companies they support. These may also encompass community theater and music companies run and staffed by community volunteer boards and performers.
- Park departments, senior centers and community centers.
- Senior centers.
- Hospitals and public health services.
- Colleges and universities and public and private schools.
- Public sports facilities.

It's also important to learn about economics and employment issues and trends. Some of the information about economic issues can be found in public records, but some will come from interviews or conversations with business people, government officials, and activists, and even from dialogue with other contract education professionals.

It's fairly easy to notice if one huge industrial plant dominates a community, for example, or if every third building appears to be a construction company. There are a number of questions you might ask in order to help understand the community's economic base and situation.

- What is the anchor of the community's tax base?
- Who are the major employers?

- Does the community have a particular business or business/industry category that underlies most of the jobs?
- Are there lots of locally-owned businesses and industries, or are most parts of larger corporations headquartered elsewhere?
- Are there corporate headquarters in the community?
- How much office space is there, and is it empty or occupied?
- Is there new development, and is the community attracting new business?
- What is the unemployment rate and how is it trending?

Knowing about your community and how it works will give you a better idea of what projects and programs will succeed, and how to approach local businesses about them. It will tell you what funding to accept—and what to reject, because you'll know what programs are a good match for your community. All of this will increase your chances of success and will make your work faster, easier and more satisfying.

Section 3: Competitive Analysis

LERN suggests you review your competition every year. Focusing especially on your top few competitors, gather the information necessary to create success. Fill a gap in the marketplace. Do what they can't do. Be what they can't be to your clients. Find out what they've missed and bring that to your client base. Here are seven easy steps to competitive analysis.

Step 1: List Your Competitors

Start by listing at least your top competitors. These will be businesses who provide a similar product or service to yours, and who seek to serve the markets you also would like to serve.

Step 2: Write a Simple Overview

Write a brief description of the competitor's business and what you think their strengths and weaknesses are. Note how well you know each competitor, and whether you have met them and made relationships with them. (If you compile all of your competitor profiles, you'll know something about the general competitive climate with other businesses or institutions in your area.)

Step 3: Know Their Target Clients

Next, identify the clients that your competitors tend to attract. You can do this by going through their marketing materials, social media pages, website, and so on. Who are they targeting? Do you know why and how? Do they compete for your exact business? Do they compete in some of your areas but not others?

Here are some questions you can work to answer as you attempt to identify your competitor's target market:

- Based on your competitor's marketing message, what kind of companies, industries and employees are they targeting?
- Are they targeting low, middle, or high-income clients (or small, medium or large businesses—or everyone? Look at their pricing information, including how they phrase it. Also look at the marketing materials themselves, whether it's a brochure or web page.
- What is the main messaging of their marketing materials? What common client problems or goals do they most often refer to? How do they language their services and the providers they use? What are they actually selling?

Step 4: List Their Pricing

Notice how your competitors' price their products and services. Note how their prices compare with yours. Pricing strategies often tell a story of whether your competitor seeks to be seen as competing on price or quality.

Step 5: Notice Their Marketing Strategy

Deconstruct how their marketing works. Analyze the following:

- **Print Marketing** methods such as brochures, posters, billboards, etc. Make note of both their content and their general approach.
- **Social Media.** Note the social media channels where each of your competitors have a presence. How many fans or followers do they have? How many comments or shares do their posts get? Are they socially active—or barely a presence?
- **Website.** What's the first thing visitors see in your competitor's website? Is there much text on the website, and if there is, what does it emphasize about your competitor's business? Do they have customer reviews and testimonials? How are they doing?
- **Blog.** Do they have a company blog? If they do, how often is it updated? Are there comments or social media shares on the blog posts?
- **Advertising.** Have you seen any of their ads online, in local newspapers, or in the yellow pages? What is the call-to-action on their ads?
- **Promotions, Sales, or Events.** Do your competitors hold any promotions or events meant to attract new clients? Do they attend trade shows or sponsor third-party events?
- **Partnerships.** Do they partner with other businesses or individuals? What types of partners do they choose and what do they typically cross-promote with these partners?

Step 6: Identify Their Competitive Advantage

Next, find out what makes each competitor unique. This is their "competitive advantage," their USP. What do they offer that the other competitors don't? Why would some clients pick them over you or your other competitors?

Step 7: Find Their Strengths and Weaknesses

List their strengths and advantages. Note how equipped you are to deal with these strengths. Can you do better than them or would it serve you better to outdo them elsewhere?

The same goes for their weaknesses. Do their weaknesses present an opportunity for you? Will they be able to overcome these weaknesses easily? If so, how will it affect your business if a competitor turns their weaknesses into strengths?

Have you seen reviews of their work? Do have clients who do business with them? This can help you see a business' weakness and strengths based on what their customers see.

Given what you now know about the competition, make changes to your own strategy to accommodate any new insights you've learned.

Section 4: Data to Collect and Market Segmentation

Data collection, analysis and reporting is a vital component of contract education marketing. No longer can we can make gut decisions about clients to serve, contracts to sell, and selling actions to take; our decisions must be data-driven. With limited resources, mistakes are costly.

In the past, one person could make all the decisions because he or she had been in their position for a long time and knew the answers. With staff leadership transitions, as well as increased contract education complexity, data-driven decisions have replaced one person being the answer guru. Also, central administration believes numbers.

<u>Contract Education Data</u>
The following is the data you should collect on each contract:

Salesperson	Person who sold the contract
Company	Client who purchased the contract
Industry	Industry the client represents
Category	Type of service, for example training or consulting
Subcategory	Within type of service, the contract-type, for example in training supervisory training or customer service training
Contract	Contract purchased by the client
Contract Generated	Contract was a repeat client, referred client or lead generated client
Discussion Started	Date the discussion about the contract started
Contract Date	Date contract was signed
Contract Price	Price client is paying for contract
Participants	Number of people serviced by the contract
Instructor Cost	Cost for instructor to deliver contract
Development Cost	Cost for any pre-delivery contract content development
Materials Cost	Cost of materials required by contract
Other Cost	Any other contract delivery costs
Quality	Quality score for the contract given by the client
Contract Benefit	Increased sales and/or reduced costs due to contract
Cancel	If the contract was cancelled

You can collect the above data on a spreadsheet. The above data points are spreadsheet columns and then you collect data on each contract sold.
At the end of each quarter you would add the following data to the spreadsheet:

Sales Cost	Total dollars spent selling (normally this is the cost of salespeople) divided by contracts sold
Prospects	Total prospects (anyone you tried to sell) contacted
Leads	Total leads (a prospect who shows interest in purchasing) developed

You would plug your sales cost, prospects and leads numbers into the spreadsheet. Each contract sold would have the same numbers.

With this data you can use LERN's Contract Training Tool or a data analysis process/tool you have, to determine critical information such as sales, operating margin and average contract fee by salesperson, client, industry, category and subcategory. But you also can generate important marketing data such as:

Client Repeat Rate	Percentage of clients that repeat from one year to the next
LifeTime Value	Value of the average client over their projected lifetime purchasing
Sales Mix	Repeat clients, referred clients and lead generated clients
Prospect to Lead Ratio	Number of prospects it takes to generate a lead
Lead to Contract Ratio	Number of leads it takes to generate a contract

<u>Market Segmentation</u>
Data collection also allows you to determine your contract education primary market segments. 20 percent of your clients generate 80 percent of your sales. Within the 20 percent there are market segments defined by demographics and interest area.

Market Segment Example:
- Industry: Jewelry Manufacturers
- Interest Area: Supervisory Training
- Participants: Production Managers

Market Segment Chart:

Market Segment Example			
Industry	**Participants**	**Interests**	**%**
Manufacturing	Production Managers	Supervisory Training	19%
Service	Frontline Staff	Customer Service	14%
Hospitals	Emergency Room Nurses	Stress Management	13%
Manufacturing	Sales Staff	Negotiation	9%
Construction	Carpenters	Safety Training	7%
Banking	Tellers	Customer Service	5%
Service	Technology Staff	Big Data	4%

Most contract education units have approximately seven primary market segments generating 80 percent of their sales. Once you have identified the market segments, you want to find out the market potential (the number of similar clients) and your market share (the percentage of the market potential clients in your client-base). Your best chance of increasing sales is selling to potential clients falling into your primary market segments.

Section 5: Building Your Sales Kit

The function of a sales and marketing sales kit is to educate your clients about your business and what makes you a better match for their business than the competition. In a sales kit, you tell a brief, compelling story of your products and services and build confidence that you can deliver—based on past experience, breadth of resources and testimonials from satisfied clients.

The best sales kits are customizable. What's compelling for one client may not be compelling for another. At LERN, we like kits that have space for inserts that explain what you do, how you do it, and what kind of results you can produce for the clients you serve. The best sales kits are results-oriented. They focus on the client and the client's challenges. They communicate that you can provide a solution to their most challenging problems and that you can partner with the client in making important training and education-related decisions.

The kit is a sales call "leave-behind" that can have print materials like course offerings, certificate programs, instructor bios and so on. There should be a slot for your business card and a place for brief information about your institution.

A good sales kit will help motivate the client to call you for a more in-depth in-person sales call. To do this, the kit has to establish trust, credibility and a sense of urgency for the client to overcome inertia to contact you right away. You'll need to project an image of collaboratively generated success and preferably of being easy and convenient to work with. You'll need to communicate that you will absolutely understand the client's challenges and opportunities, and that you'll use that understanding to help the client have success.

A client should be able to easily look at your sales kit COVER (both front and back) and immediately tell

- Who the kit is for
- Who it's from and
- Whether or not it's immediately relevant to the potential client's needs and issues.

Common cover elements include

- Photos of people that look like the clients you're trying to attract
- Successful looking people like those you hope to serve

- Your logo
- Your contact info
- Some VERY brief copy that expresses who you serve with training and other educational services.

Your client should be able to tell in 3 seconds or less whether the material inside will be relevant and compelling to them.

Use brief, compelling sales language that indicates a focus on results—not on your institution, or your content. This is key.

When the client opens the sales kit, they should find a main insert, followed by course or service descriptions that deliver your main mission message (what you will do for the client), and your differentiating features as a service provider. The average client will spend just 30 seconds deciding whether to continue reading.

As the client proceeds to read the product and service descriptions, if you capture their attention by building DESIRE to have the success you've helped other clients achieve, they'll give you up to three minutes of continued attention.

At the end of the kit, you want a compelling call to action and your contact information. Work on the call to action. If you fail here, the client will put the kit down, and you'll miss the opportunity to connect.

The average client will read quickly.

You can also include pieces that are meaningful to specific clients, like press releases, articles that are industry-specific or case studies and testimonials.

This sales kit will be your sales representative when you leave. Will it do the job? How?

An effective sales kit design follows the AIDA principle:

A = Attention

The cover establishes immediate and compelling interest. The sign that it is working is that the client turns the page and starts reading. The cover ideally has contact info on both the front and back, so if a prospect wants to call you without reading the inside contents, they have the information to do so.

I = Interest

On the pages the prospect first sees, you establish that you are worthy of partnering with the client to achieve their business goals.

D = Desire

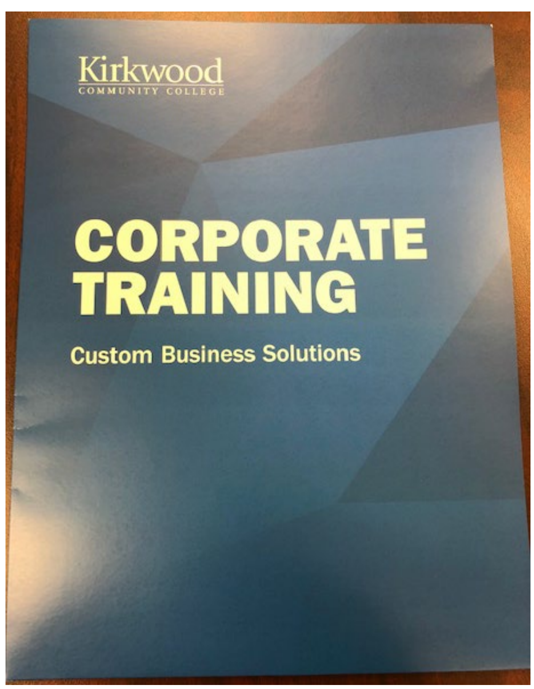
On the inserts that follow, the client should experience a growing desire to use you to help assess their needs, design a training or educational solution and to deliver results that boost their goal-related performance.

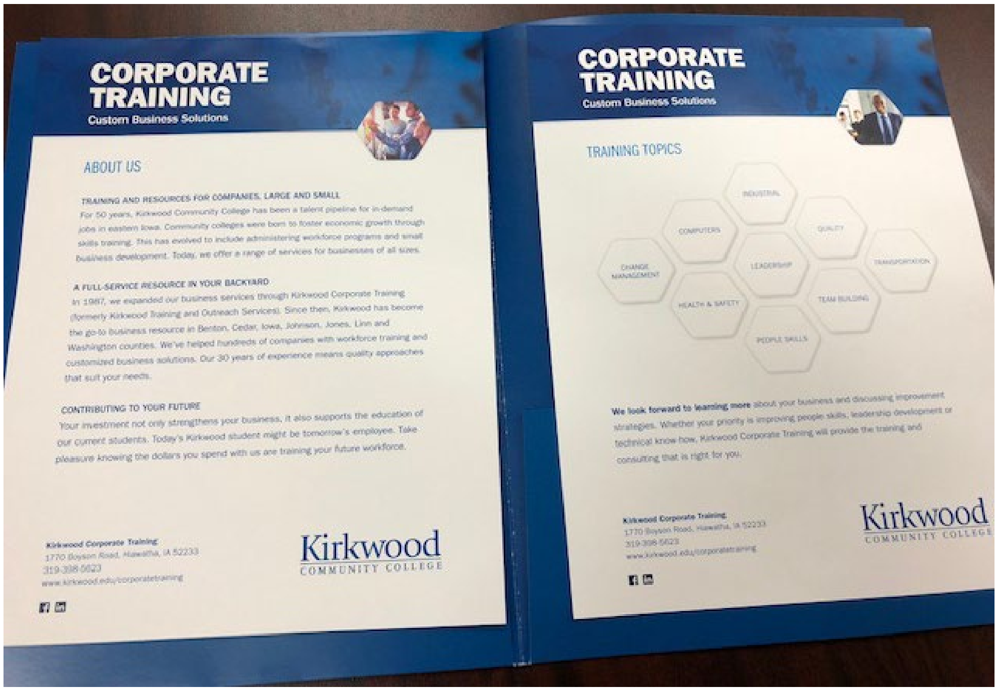
A = Action

The last page or panel should have a clear, easy-to-spot call to action. This brief bit of copy should strongly compel the client to contact you right away. Put your contact information there—not the institution's main number, but your direct line. Don't let anything stand between you and the client setting a face-to-face meeting as soon as possible.

Show the design for your sales kit to several people experienced in the field. Note their suggestions and comments and use them to refine the design. Print only enough copies of the outer folder to last three years. After three years your sales kit will need updates to keep up with design, business and productivity trends and images.

Your kit represents you. It compels your future clients. Be sure it matches the image you want to project.

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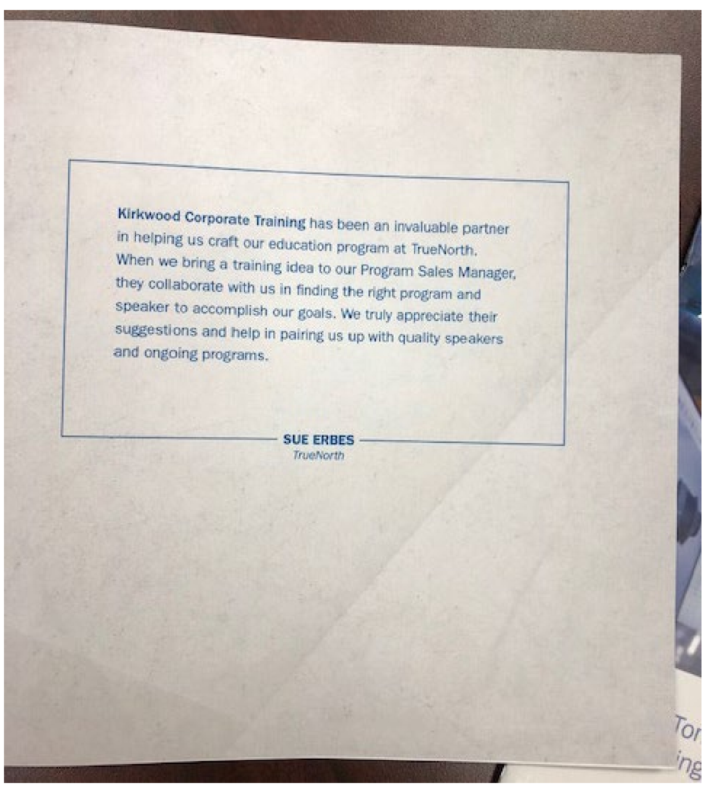
Kirkwood Corporate Training has been an invaluable partner in helping us craft our education program at TrueNorth. When we bring a training idea to our Program Sales Manager, they collaborate with us in finding the right program and speaker to accomplish our goals. We truly appreciate their suggestions and help in pairing us up with quality speakers and ongoing programs.
SUE ERBES
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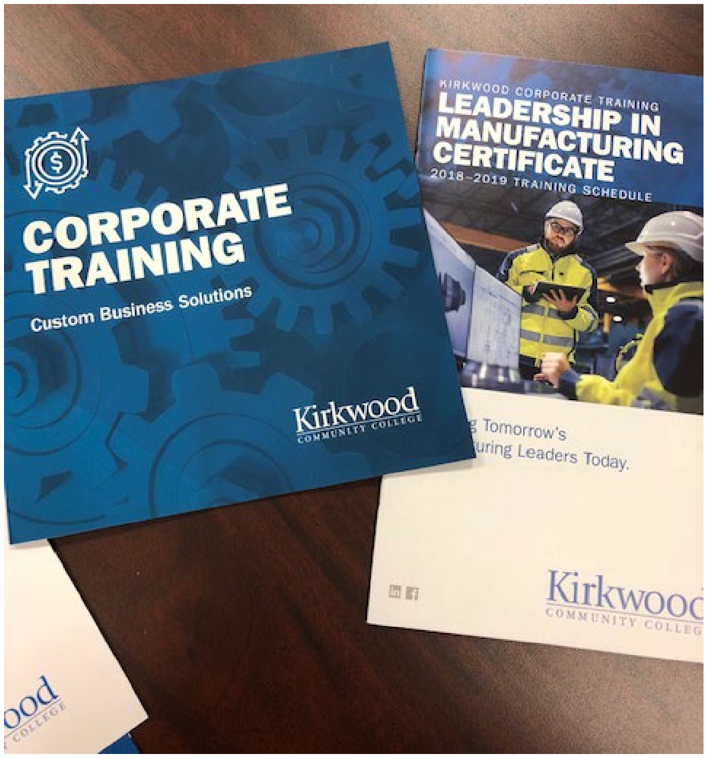

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OUR
APPROACH.
Listen → Assess → Respond

Section 6: Building Your Website

Too many contract education websites look the same. Boring. Hard to navigate. Like they might have been made by the designer that made everyone else's website. What can we do to fix this? What does a good contract education website look like?

First of all, it has to be clear who you are and what you do, for whom.

Prospects looking to hire an institutional contract education unit are not as interested in YOU as they want you to be interested in THEM. They want to be able to immediately ascertain that you have a process for understanding their challenges and opportunities and that once you've figured them out, you will be able to design and deploy a training/education solution that helps them accomplish their most important business goals.

So—don't put a photo of your building on the home page. Put a colorful or bold photo of people who look like your clients, doing the things successful people in their industry do.

You have to stand out.

You have to differentiate yourself from your competition. You have to fill a gap they haven't yet. You have to be unique in a way that speaks to your clients' most pressing needs or best opportunities.

Get personal.

Write in second person. YOU. Speak to the client. Don't say "when people" say "when you" work with us.

Get to the point.

People don't have much time. You'll typically get 3-30 seconds of reading time before a client clicks on your site or moves away. Make it easy to skim and find the most relevant information. Do this with pull-down menus and typographical effect like color and bulleted lists.

Be clear who you are.

Culture can be an incredibly influential factor in the decision-making process and as a result, your website should open the doors to it to help prospects understand, relate, and buy into it. A website that exudes a strong sense of culture should have the following elements: An “About Us” page that tells an engaging story: This means that you’ve spent as much or even more time crafting the content for this page with a goal of getting your prospects to empathize with your message.

Show who others think you are.

Embed text and photo testimonials from clients for whom you created success. This proves you have the capacity to help the client succeed. Emphasize not what you did—but the effect it had on the client’s success. Use numbers. Use proof. Use the client’s actual words.

Build Trust.

Prospects are on your site because they’re trying to educate themselves on a challenge or opportunity they’re facing. Even though they may not be able to clearly articulate their situation to themselves, they want to somehow feel you’ll recognize it. Develop trust with examples of how you’ve served. Give helpful content—eBooks, PDF downloads, links to helpful material and printouts.

Set pricing expectations.

Help people get a sense if they are going to be able to afford your services. Let them know you’ll be reasonably affordable. If you have grant money, let them know in no uncertain terms. Don’t hide the copy about pricing. By sharing realistic pricing information upfront, you’ve effectively educated and qualified your potential buyers.

Sell results, not academic content.

Showcase your success stories. Be brief and convincing. Don’t have long lists of content. Save that for face-to face sales calls and file copies of your information. Or keep that copy in deeper parts of the website for motivated readers. Use actual photos of real people in your area of service, not stock photos. It will be worth it.

Optimize your site for mobile viewing.

Mobile and device-responsive websites are key. Your audience is using their computer, tablet and phone to read your content and to share it with others. Your website has to look good in mobile format and it must actually work.

Make it Easy for Prospects to Contact You

Supply prospects with a place where they can submit their information so you can contact them or have a "live chat" window available. Be sure you have a CONTACT US pull down tab on the home page and scattered throughout the website.

Install Google Analytics

You need to use Search Engine Optimization (SEO) and you need to measure the ebb and flow of traffic on your site. Using Google Analytics, a free, powerful and easy-to-use web metrics tool—or something similar, get a snippet of tracking code that you can paste into each page of your website. The reports you generate will tell you whether your website is working.

Write content specifically for YOUR target audience.

Don't use educational language unless you're serving educational institutions. Use the language of your prospects. Listen when they talk. Talk back!

Use more video.

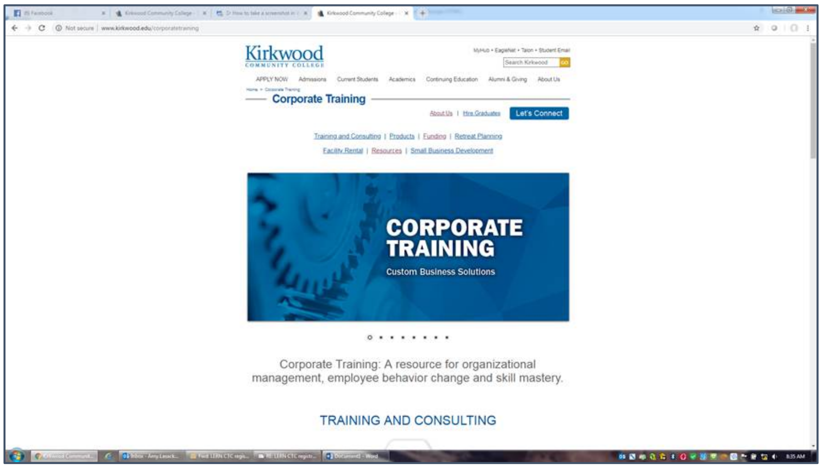
Video is cheap to produce and it talks up a storm! Use it. Use short, meaningful clips that convey your ten most important messages. (Don't know your ten most important messages? Figure them out!)

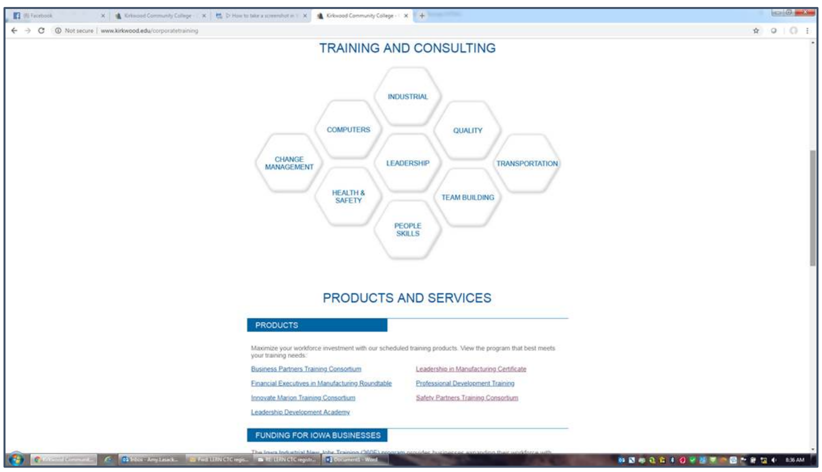
Get a powerful call to action.

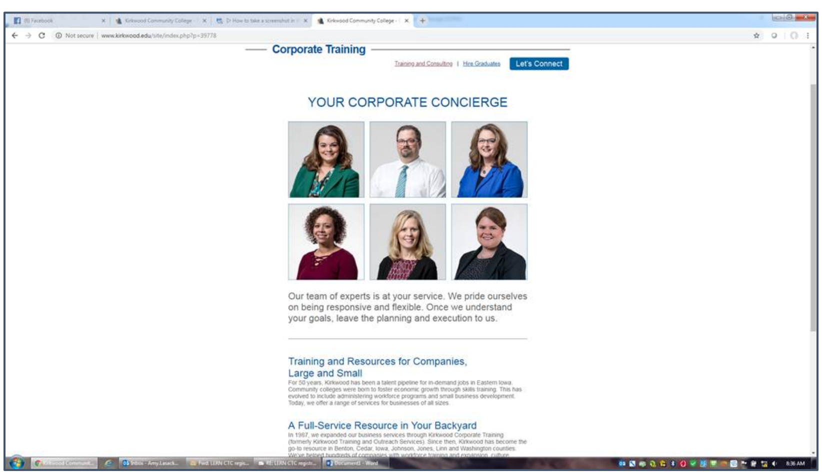
The whole point of your website it to get the client to call for an appointment. So why do so many Contract Education websites bury the information needed for prospects to contact them? If you can't be accessible at this stage, who will believe you can make working together any easier. A good call to action is clear, convincing and has a sense of urgency.

Go back and review the AIDA design paradigm in the section on sales kit design. It applies to websites, too!

Website www.kirkwood.edu/corporate training main page:







Section 7: The Role of Lead Generation and Nurturing

Lead generation is the action or process of identifying and cultivating potential clients for your products and services. With the lead to contract industry benchmark ratio at 4:1, it is important that you dedicate resources to lead generation.

It is best to have one person, whether full or part-time, focused on lead generation. Your promotion budget should include monies to support lead generation. In order to track your leads and build a pipeline that scores leads and ranks them at a potential to close percentage, a contract education unit should be using a customer relationship management tool where you can load prospects and leads.

<u>Lead Generation Techniques</u>
The following are lead generation techniques successfully used by contract education units:

1. Referrals. With 25 percent of sales coming from referrals it is critical that a salesperson during their quality assurance visit asks for referrals.
2. Analyze Current Clients. Understand your primary market segments and research potential clients within the primary market segment.
3. Analyze Current Students. In the course programming-side of your organization there are students who are sent by their company, government agency or organization to a course. They understand the importance of training and should be considered and handled as a warm lead.
4. Events. You can schedule free webinars or speakers and invite potential clients. The ones attending now become leads and due to the event attended, you know at least one of their interest areas or needs.
5. Breakfasts. Invite a select number of potential clients to a breakfast with your president or primary leader. The breakfast is a meet and greet, but also a chance for your institution and contract education unit to showcase expertise and opportunities.
6. Networking. It is important to be attending Chamber of Commerce gatherings, but also conferences where your potential clients are learning about best practices and trends.
7. Sharing Knowledge. Using digital marketing, develop and share knowledge such as case studies and research that highlight trends and your ability to provide support. You cannot be an expert in all content areas, so choose three to seven.

8. Consortiums. Each year offer monthly trainings that a company can purchase seats for employees to attend. Package the trainings so an employer can buy X number of seats and use them throughout the year. This way you make some money but expose employees to your training and services in hopes they will recommend you for a contract.

<u>Nurturing Leads</u>
Lead nurturing helps your potential clients get to know you better. Think of it as a dating period where two people get to know each other better before getting married. Lead nurturing allows you to educate, inform and build trust.

You want to stay in touch, but not be a pest. You want to keep demonstrating your expertise. The following are lead nurturing actions to consider:

- Use testimonials. Have existing clients vouch for you. This could be done with case studies or written testimonials, using videos or having them contact potential clients.
- Continue to distribute content. Using your customer relationship management system, you should be able to set up drip campaigns that monthly/quarterly send out valuable content.
- Notice accomplishments. Keep track of your potential clients and congratulate them on successes noted in the news.
- Involve them. Even though they have not purchased, invite them to represent their industry in a focus group, thinktank meeting, or some other gathering.
- Give them something free. If you are running a consortium for example, provide the potential client some free seats so they can experience your expertise and training.

You can build lead nurturing campaigns for each potential client and most important you should track in your customer relationship management tool the lead nurturing actions you have taken. Generating leads is important, but lead nurturing is even more important if you want to close sales.

Section 8: Developing Digital Visibility and Examples

What is Online Visibility and Why Do You Need It?

How visible is your Contract Education unit online? To achieve maximum digital visibility means that you are reaching the maximum number of prospects with a few clicks. It means you are more visible than your competitor, ideally. And in our business, it means that your institutional identity does not over-shadow your unit identity.

The more **online visibility** your unit has, the more likely people within your industry will look to you for necessary products or services. Sufficient name recognition in the digital domain can help even a second-tier organization find its way to success.

It takes time, energy and money to create digital visibility, but that's an investment in your success. From social media profiles to online directory listings, there are a wide variety of ways to bolster the visibility of your contract education unit. Determining which approach is best suited to your marketing needs is part of your marketing department's job. A unit that is highly visible will achieve success faster and more easily than one that is not. A salesperson for a poorly visible unit will have to work harder; if you can, why not work smarter?

What exactly is "online visibility"?

Online visibility refers to how easy it is for consumers to find your unit and its products in relevant online locations. For example, strong visibility would imply that you show up at the top of the page on a Google search, for one thing.

Internet marketing works under the assumption that clients and future clients are actively seeking out your unit and its services and events. You will have to expend costly sales resources to reach them any other way. Online visibility strategies create content, advertisements, online directories and more to ensure your unit is visible and convincing across all relevant online channels, including media, search engines and your website and other's websites, creating "share of mind" among your potential best clients.

Why should you invest in increasing your unit's online visibility?

Your institution has likely already made significant investments in online visibility. You should tag along. Your competitors in the private sector are already doing this. Don't lag behind.

Level of traffic is very important for turning curious visitors into paying clients. If you cannot keep a steady stream of interested prospects coming to your website on a daily basis, the chances that your unit and your products and services will be the first thing on a prospect's mind is dubious. Your site will need to measure unique visitors, new clients and people who visit your site regularly. These markers are all of equal importance. Each one of these groups will support your business and contribute to your growth—and for less cost than increasing your sales staff. It takes many prospects to land a contract, so volume is key.

Brand reputation and quality are key, as well. Once people know who you are, they need evidence that you're still achieving success on behalf of your clients. Part of your reputation is that clients understand that your repeat rate—the percentage of clients that return for more business—is high. 50% of your business should be repeat. 25% should come from referrals and 25% from cold-calling activity, including turning site visits into sales calls.

Strategies for Increasing Online Visibility

There is a wide array of possible strategies when increasing your unit's online visibility. Ideally, a strong online visibility marketing campaign should combine as many of these practices as possible, as they will support one another in increasing your company's findability.

A few of these routes focus on making sure your content shows up in search engines, or Search Engine Optimization (SEO), while others are about longer term, continuous connections with your consumer base through vehicles like social media marketing. Perhaps the most interesting route, however, is the creation of relevant content that provides valuable information to the consumer while inviting them to visit your website for your valuable services, or content marketing.

SEO

SEO—search engine optimization—is the process of refining a website to get higher search engine rankings and to get visitors to your site without paying for search engine placement.

SEO is one of the best ways to increase your website's online visibility. If you want your web content and site to show up in Google, Yahoo or any other big search engine, SEO is your strategy. Sites that appear higher up on search result pages are guaranteed to gain more traffic than less visible sites. Ask your IT department or marketing department to help boost your SEO rankings.

Keywords

Keywords are very important factors that increase a page's SEO potential. Google picks up SEO keywords and phrases, and the more effective the keywords used within your web pages and content, the more likely your unit is to rise on the results page. Essentially, you want to use language in your content that is similar to what your intended audience will use to seek your services. This will boost your placement on the search pages.

Load Speed

There are many other factors on a web page that contribute to its SEO potential besides keyword optimization; and one is super-fast loading speeds. Slow load times will drive users away. If a website's pages take longer than a few seconds to load—your potential client is off to other things.

Link Building

Building backlinks is another important strategy you should implement to raise the SEO potential of your web page. Backlinks are incoming links to your website. Whenever other websites or even your own content links back to your website, you increase the number of "votes" that Google will consider when calculating your SEO potential and search engine results ranking. To optimize the effectiveness of backlinks associated with your websites, your marketing department will vary your anchor text greatly, get backlinks from a variety of different platforms, and most importantly, focus on earning backlinks that will also help drive traffic to your website.

Mobile Friendly

A final way to ensure strong SEO is to invest in making your web pages mobile-friendly. Your website should be designed to work on both a computer and a mobile device. When sites are dysfunctional or hard to navigate on mobile devices, they have a hard time retaining a steady flow of client traffic.

Social Media

More than 80% of all Americans have active social media accounts, including Facebook, Instagram or Twitter, for example. Many people visit those sites daily—so keeping in touch with non-intrusive campaigns works for many of your clients.

Your institution's marketing department will most likely have policies and strategies in place to manage a social presence.

Knowing when to post and what to post is key when running a successful social media marketing campaign. Ideally, your unit's page should have a post at least once a day in order to reach the widest audience possible, while avoiding bogging down your followers' feeds. Don't over-post though and post relevant content for business and industry.

Online PR

Just as press and news releases boosted the visibility and effectiveness of your unit and its campaigns in traditional marketing practices, they can also enhance online visibility. Online publishing provides a much wider potential for such announcements than compared to traditional media such as TV and radio. The press release should be written in a way that delivers the benefits of your Contract Education unit in a clear and concise manner that will stick in the mind of the reader and listener.

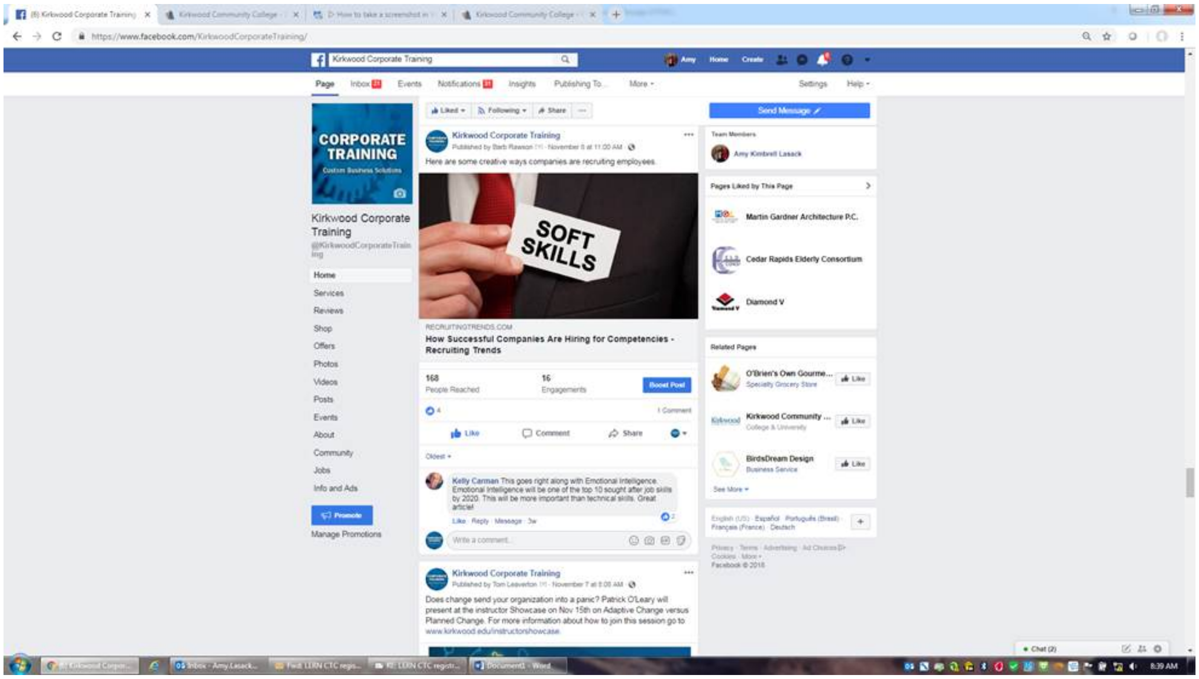
Ease of use is a good thing.

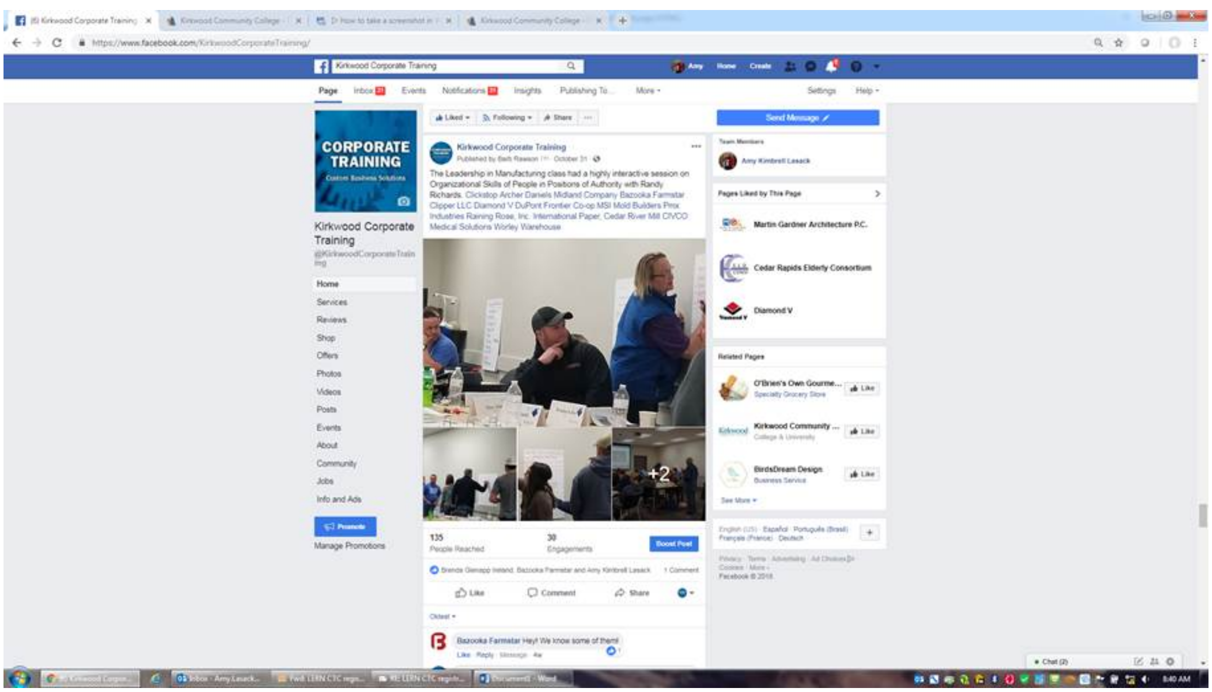
Evaluate your website for ease of use. Your clients do! Take a look. Ask yourself:

- Is your website mobile-friendly?
- Does your website function on all the major browsers?
- Is your web design and development visually-appealing and professional?
- Do you have a call to action on every page?
- Is your contact information on every page?
- Are your images up to date, inclusive and compelling?
- Is it easy to contact you or buy from you?
- Does your website load quickly?

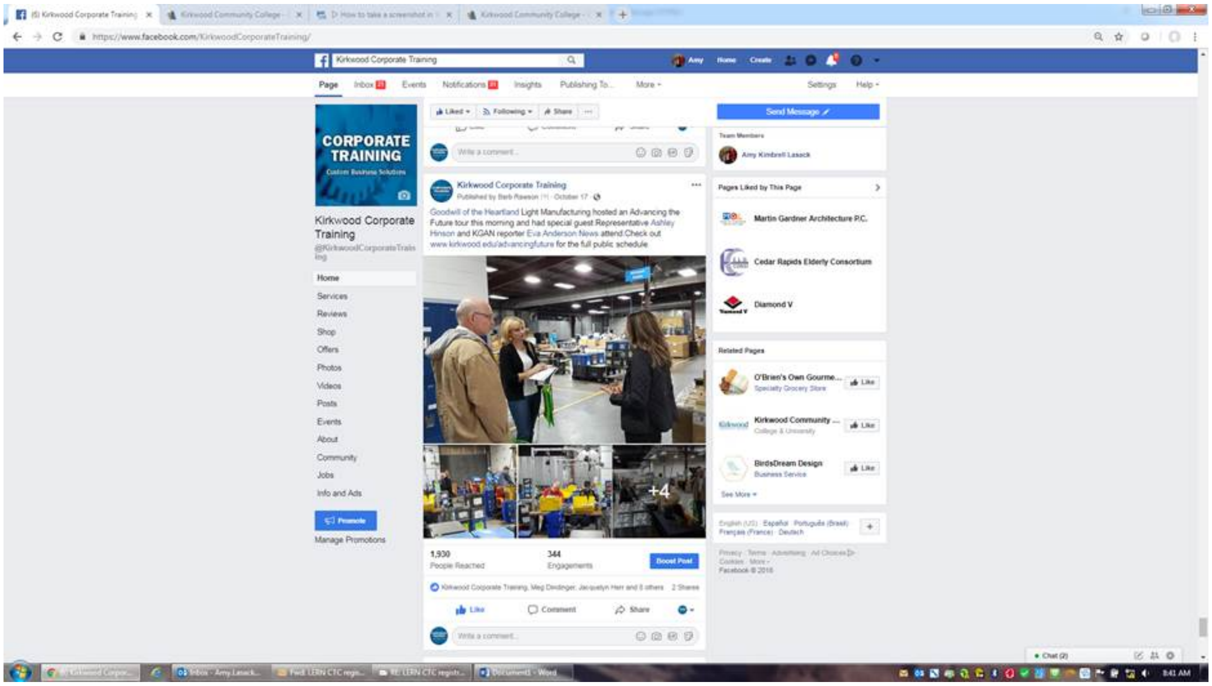
Increasing your online visibility is hard work and takes time — maximize your efforts by making sure your website is usable! Partnering with your school's Marketing and IT people will help you get the best results over time.

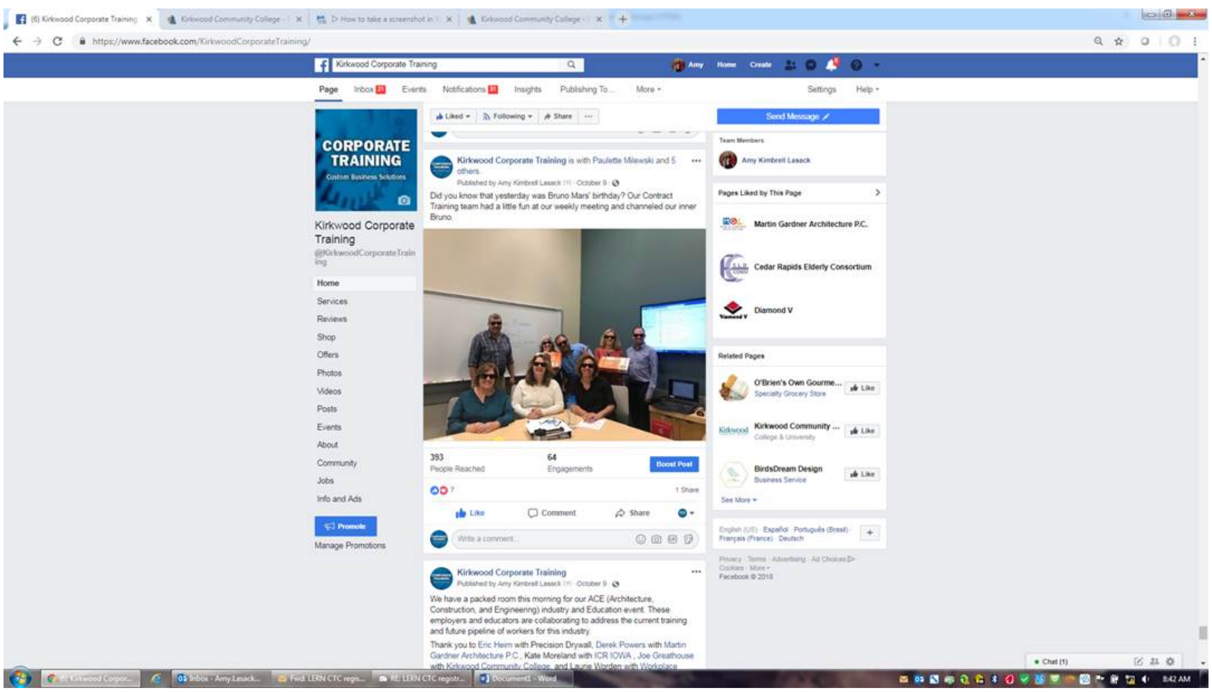
www.facebook.com/kirkwoodcorporatetraining:





www.facebook.com/kirkwoodcorporatetraining:





Kirkwood's YouTube page: https://www.youtube.com/watch?v=PMyqfoiC9Do

Section 9: Strategies for Getting In the Door

Getting your foot in the door (Isn't that a funny phrase?) takes planning, persistence and know-how. In this section, we'll list some ways you can start a sales cycle. Remember—your aim in a first-contact with a prospect is to get a meeting, if you are not already face-to-face, and to move the prospect along in the sales cycle if you are. You'll never get a meeting if you don't ask for one, and you're unlikely to get a contract if you don't suggest the option. Know your aim and know how you will move towards it—and then be flexible and responsive in the moment. This is the strategy for success.

Start calling on past clients who you have not seen for some time.

If you are a new salesperson in a contract education unit, there will be clients on the unit's rosters that have fallen away. Call on them. They are the easiest entrance to sales calls. See if the relationship can be refreshed. If there were problems in the past relationship, see if amends can be made. Often, they can. But in most cases, there will not have been any service problem. The issue will be more likely that the past sales person did not do enough follow-up work, or that the client was in a period of less need and so the relationship went fallow.

When you call, say confidently who you are, where you are from and your purpose for calling.

Companies expect you to contact them. It's your job. Ideally, you'd contact them in person, but if you cannot arrange that, then a call will be your second-best strategy to get an appointment. Be clear and immediately express your understanding that the time you called may not necessarily be a good time to talk. Let the person know you'd like to arrange a 20-30-minute meeting to meet to explain what your institution can offer. Don't say you'd like to meet for 5-10 minutes, this communicates the message that what you want to do is unimportant.

SMYKM (Show me you know me.)

Why should I meet with you? I am busy. I don't like to waste time. I don't know you from Adam. But wait—*maybe you know me*. If you want a meeting with someone, ask around or scour social networks or the company website and see what you can learn. I recall a story that a salesperson was able to get a meeting with a potential client by learning that that person was an alumnus of a certain university. The sales rep bought a sweatshirt from the alma matter and sent it in a package, with a fun and respectful letter requesting a meeting. Our hobbies, public history and our values are all possible avenues to form the basis for a relationship. I'd be glad to get a book on Nepal (a personal interest of mine) even from a stranger, and I'd feel some joyful obligation to at least return their phone call, even if I knew they were basically setting up a sales call. I'd reserve this tact for those companies or situations where you feel the opportunity warrants the time and expense.

Reach out during off hours.

Business leaders and decision makers are like you. They start early and end late—and may take time off in between. Try calling early, before the actual day starts or later in the evening, or during lunch. Send your sales emails early. This allows potential clients to get back to you in a shorter cycle.

Let your marketing do the cold-calling for you!

If a potential client has interacted with your unit's brand already, it will be easier to get in the door. So, make an effort to get an appointment with those who have already interacted with your brand—and make sure to do it quickly.

This will require you get information from the marketing person about who has responded to in-bound marketing. For example:

Who has downloaded white papers, attended webinars, or added themselves to your unit's email list? Make absolutely sure you or your marketing unit collects names and emails from all business-oriented events at your institution. This could include events you sponsor, events at which staff or instructors speak, and even classes if your institution permits that. Contact those people right away. Establish that you are glad that they attended and that you are calling to say thanks and to offer to meet in person or to bring them any information they need.

Offer to explain what you can give for free, or for a deal. Make the potential client aware of discounts and potential ways to save money or time.

Some businesses don't know you have—because of outside funding, for example—opportunities to give them seats in classes for reduced costs, or even for free! Call and say, "I'd love to share this with you." Bring printed materials—or come back to bring them after your fist meeting. Be ready to explain the other myriad of ways you can help make their training cheaper, faster and better. Fill the gap that your competition does not serve.

Earn a presentation spot at industry meetings.

When you or your staff or faculty make valuable and professional-level presentations at industry meetings, you have a brief opportunity to say, “I can give you more. Come get a card right now or let’s meet for coffee.” Save a few meeting appointment slots at the presentation event itself. This is one of the easiest and fastest ways to generate an opportunity. The one thing, though, is that you have to be a top-notch, informed presenter who’s clearly prepared in a thorough way. The presentation will speak for you, so make it excellent. Prepare at least a one-page leave-behind that has all your contact info displayed.

Say something enticing and honest when you meet or send an email or call.

You should have a script. You should know what you’re going to say. The words you use matter. Something like this can work: “Hi Mr. Camden, this is James Bell from the Contract Education unit at XYZ campus. The reason I am calling is that we recently helped ABC Company lower their costs by 30% while meeting their annual training goals, and I thought you might be interested in learning more about how we did that—because frankly, it wasn’t that hard to accomplish, given the funding assistance programs we have. Would you or anyone else at your company be interested in learning more?”

Create a targeted telephone list for your salesperson or inside-sales person—and use it.

Create a cold call list from potential clients listed in trade association directories, chambers of commerce rolls, your business contacts and other resources. Be sure to include referrals you obtain from current clients. (25% of your business should be coming from referrals.) Set up your contact management software to track your calls and conversations—and especially also track any face-to-face meetings generated. This will tell you if your approach is working. A ratio of 4 leads--four interested parties--to 1 contract gained, for those who make it to that point in the sales cycle is a good benchmark.

Ditch the sales-call-in-two-minutes approach.

A data dump in a rushed tone clearly communicates to a prospect that you are pretty sure they’re going to turn you down, and that you’re ready to move onto the next conversation before you’ve even started this one. That’s just plain off-putting.

Say what’s most important. Take your time but be BRIEF. Silence on the other end is OK. They’re thinking. Let them think a bit. If they immediately turn you down, thank them for their time and suggest that you hope to meet them in the future.

But then hang up and see if you can remember what you said and did before your offer to meet was rejected. Analyze your approach and re-work it. You'll get better and better. Start with the clients you least want to have while you tune your approach.

You will be rejected. It's OK. Keep calling but get off the phone when the signal is that you are not going to make a sale. Statistics suggest that it's not uncommon to make up to 12 contacts (in person, in writing, on the web, etc.). This will take persistence. At first, it will be challenging—especially if you don't have a lot of cold-calling experience.

If they're interested, keep talking and be sure to share your USP. Tell them it's what's in it for THEM.

In 2 or 3 brief sentences share the benefit of your services, what is unique about it, and one piece of *evidence* that this works. The USP is the compelling argument why people should buy from you instead of someone else. If they seem convinced, see if you can get them to talk in some cursory way about their needs. Citing previous work and showing testimonials creates confidence.

Go for the meeting.

If your goal is to set up a meeting, say something like this: "Perhaps we can sit down together and . . . (give them a general idea of what you'll do in the meeting – usually about identifying their needs)." Notice the phrase *sit down*. That implies a face to face meeting without the time-consuming inconvenience associated with *having a meeting*.

When you do get the sales call.

Remember, it's not what the prospect can do for you, but what you can do for your prospect. Slow the sales process down and focus completely on their need and how you can meet it. Listen to hear what matters most to them. This process of listening will let you know exactly the information you need to make the sale.

Keep at it!

The chances that you are going to call on a prospect at the exact time they need your product or service are slim to none. So, if you want to turn more prospects into clients you need to **follow-up and follow-thru**. In other words, you need to stay in the game. The goal with sales is to again **build the relationship, but then continue to add value to it** in a way that ensures you are the person your prospects think of when they are ready to buy. You can do this—but you'll need a plan. Sales are earned. They don't fall out of the sky. Well, they do—sometimes—and usually because you're down on the ground, looking up, with binoculars, calling to the birds, bread in hand.

Section 10: Contract Education Market Plan Sample and Template

Planning is critical. Ideally a contract education unit should have:

- Vision Statement. Where you want to be and what you want to look like in three years.

- Strategic Plan. New revenue streams and long-term improvements over the next two to five years.

- One-Year Business Plan. Your plan for the upcoming year with accountability. Contract Education One-Year Business Plans include the following:

    1. Contract Education Annual Goals
    2. Contract Education Budget
    3. Contract Education Benchmarks
    4. Contract Education Plans (normally prepared by market segments or categories)
        - Operating Margin Budget
        - Benchmarks for Market Segment or Category
        - Contracts to Sell to Reach Sales Goal
        - Selling Strategies
    5. Contract Education Plans by Quarter
    6. Contract Education Market Plan
    7. Staff Responsibilities

An important component of the One-Year Business Plan is the Market Plan. The Market Plan includes the following:

1. Annual Marketing Goals
2. Annual Marketing Budget
3. Marketing Benchmarks
4. Client Retention Actions
5. Campaigns
    - Lead Generation
    - Visibility
6. Staff Responsibilities

The following is an example Market Plan:

Contract Education Market Plan
Fiscal Year XX

Annual Marketing Goals

- Redesign the website including adding landing pages for top five industry sectors we serve.
- Develop a sales kit that has different covers for top five industry sectors we serve and targeted inserts.
- Purchase and implement a customer relationship management tool with inbound/outbound marketing functionality.

Annual Marketing Budget

- Total Marketing Budget: $25,000
- Lead Generation Marketing Budget: $20,000
- Visibility Marketing Budget: $5,000

Marketing Benchmarks

- Prospect:Lead Ratio. 10:1
- Lead:Contract Ratio. 4:1
- eMarketing Open Rate. 20%

Client Retention Actions

- Clients purchasing during the last three years receive relevant written or video content two times.
- Clients purchasing during the last three years receive a 25 percent discount on their consortium purchase.
- Clients purchasing during the last year receive a "check-in" call from their instructor/consultant.

Campaigns

Lead Campaigns

- Quarter #1
  July: Free speaker on winning sales techniques.
  August: eMarketing campaign for service industry.
  September: Article and other communication recognizing our top clients.

- Quarter #2
  October: Free webinar on latest human resources regulations.
  November: eMarketing campaign for manufacturing industry.
  December: President's breakfast for banking industry.

- Quarter #3
  January: Free speaker on trends in digital marketing.
  February: Attendance at annual manufacturing conference.
  March: eMarketing campaign to service industry.

- Quarter #4
  April: Selling seats for FYXX consortium.
  May: President's breakfast for health industry.
  June: Free webinar on staff productivity best practices.

Visibility

- Determine our unique selling proposition and implement strategies for promoting.
- Test implementing a service sector advisory council to provide better access into the service industry.

Staff Responsibilities

- Kathy will be responsible for website redesign and sales kit development, as well as content and consortium discount client retention actions.
- Roy will be responsible for purchasing and implementing customer relationship management tool and tracking and reporting on benchmark numbers.
- Mary will coordinate client retention "check-in" calls and campaigns.