

United Way Increases Training Adoption with New Marketing Approaches

Industry

Not-for-Profit

Challenge

The United Way Center for Community Leadership is tasked with the training and development of more than 9,300 employees and numerous volunteers at 1,289 local United Way offices in North America. With small budgets and limited resources, the learning team found that they needed to bolster their marketing to attain a higher adoption of training from their learners without spending more money. United Way tapped Expertus, a global provider of services that optimize the business impact of learning, to help them address these issues and improve their training utilization.

“Training is key to our group’s mission of building capacity,” says Heidi Kotzian, Director of Marketing and National Events at United Way of America. “The United Way’s movement will succeed only if our staff has the tools and knowledge they need to effect change. We can promote greater capacity-building throughout the system by marketing training and convincing staff that the training we are providing is valuable.”

Expertus and United Way began this process by meeting to discuss how to effectively market the courses, events and their other learning opportunities. In this meeting, United Way and Expertus outlined some major challenges, which included:

Strategic Outreach

The learning department needed to improve how they get the word out about its offerings and needed to find appropriate methods to share news, generate buzz and increase participation.

Consistency

According to Liz Moderi, Manager, Marketing and Learning at United Way, inconsistent messages caused confusion in the greater organization. She states, “In the past, each course or event had its own look or image and there was no consistency across products throughout the year.”

Tracking

Historically, United Way did not have a system to track marketing messages or measure success. By getting organized around their marketing outreach, messages, target audience, and timing, the learning team will have a better grasp on success rates.

Solution

Over the last two years, in conjunction with Expertus, the United Way learning team developed a new approach to marketing its programs. This new approach has been extremely successful. By taking a fresh look at what was working and what wasn’t, United Way was able to make some tactical changes that made a huge difference.

Back to Basics

The marketing team reviewed the challenges they were facing and decided that a useful first step would be to get “back to basics.” With Expertus’ insight, United Way developed a proactive approach to strategic planning, appropriate staffing and enacted a marketing plan that would heighten awareness and improve the response rates for marketing outreach.

To improve organizational consistency, the learning leaders enlisted support from the brand team to focus their marketing on a new, very successful campaign called LIVE UNITED. The campaign included a new look, fresh language and message strategies. By rebranding materials to tie-in with the look-and-feel, they capitalized on the excitement of the new campaign. The group also created a learning LIVE

UNITED look for all print and electronic marketing.

To address the obstacle of strategic outreach, Expertus and the United Way learning team audited what was working and what was not. It became clear that additional resources would be required to keep the marketing program on track. "We evaluated where additional help was needed, and lobbied and received support from administrative staff for functional tasks. A staff person was assigned to provide better metrics and tracking of budgets, attendance and revenues," Moderi adds. Because the marketing team had not taken a hard look at success rates in the past, it became clear that regular reviews of activities and metrics were quite important.

"We scheduled weekly meetings to review marketing strategy, discuss implementation and determine where help was needed. This provided the opportunity to respond proactively, much further in advance, to training issues and attendance shortfalls," says Moderi. "We developed tools to help track and monitor marketing messages, including a calendar devoted to tracking the timing of messages that went out over the daily intranet email. We developed an organization system for our files, so it's easy to find what wording we used when we previously advertised a program - allowing us to reuse language and update, saving time." As the team looked closely at how to streamline operations, time-saving techniques were often revealed. "We worked to tap into communication and marketing tools that already exist in the building, including

listserv announcements. We promoted cross-marketing of learning courses and events by creating flyers to pass out at each event."

They also decided to save learners' time by cleaning up and shortening the cumbersome learning catalog. "We redesigned our learning catalog to make it much more user friendly and economical - going from 400+ pages to 34 pages, adding online id's for easy look-up from print to online, and icon language that conveyed a large amount of information in a smaller space. We also updated and improved the search functions on the online learning catalog," says Moderi. It became apparent that this project was a good use of time, as the printed and online learning catalogs are now United Way's most successful marketing tools for learning and events.

Results

As a result of streamlining marketing efforts, the United Way training department saw program attendance grow by 31 percent for learning courses. Even with 31 percent more students in each class, overall satisfaction scores went up slightly.

While costs may increase and the number of learners will grow, United Way has found a steady cost-per-learner. "Fortunately, with more learners, our cost per learner has remained steady, even with increases in catering costs and additional contract trainers, who are more expensive than staff trainers," says Kotzian.

Kotzian notes that the team witnessed an increase in the learning culture because of their increased visibility and clarity of message. "We have seen an increase internally from those recognizing the benefits of reaching local United Way staff through learning courses and events. This has improved overall planning and development."

Moving forward, ROI will continue to grow as this group measures and validates their spending and efforts.

"We are working to improve ROI tracking. In 2009 we implemented a pre-survey, immediate post-survey and three-month post-survey at a national event. We will take lessons learned from this and apply them to other events and courses," said Kotzian.

Overall, the United Way project well illustrates Expertus' commitment to strategic planning and efficiency in learning organizations. Learning leaders are often hungry to clean up inefficiencies and illustrate success, but sometimes need assistance in doing so. "Expertus was really helpful in forcing us to think longer term about our marketing programs than we did before. It's easy to get bogged down in the day-to-day crises, but they reminded us of the importance of thinking strategically and planning long-term," concludes Kotzian. "They were also helpful in helping us think through benchmarking and focusing on metrics. This makes our year-end evaluations stronger, with numbers to back up our performance."



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