Marketing in the NDIS – webinar 4

# Tactics for your marketing plan

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# Slide 1:

## Housekeeping

Hello everybody. This is Stefan Delatovic. Thank you for coming to our webinar. I'm very happy to have you here.

As you can see from that initial slide, I am Stefan. I'm an account director with Think HQ. We are a communications agency that does work helping people who are doing awesome world-changing things get their message out, which is sort of why I'm here today.

Welcome to everybody who's sort of joining us for the first time in this series of webinars, but also, you know, a warm thank you for coming back to people who've been listening to us throughout the series.

# Slide 2:

## Think HQ

We've got an hour today, and I will - we've got a bit to get through, so I'll sort of **[00:47 inaudible]** through it to use your time well, but we're here to help you with sort of the, you know, the tools and tactics that can help you build a good, sustainable marketing practice in your organisation.

So with that in mind, I'm going to go through a presentation here, but at any time if you've got a question, if there's something you'd like me to focus on or drill down on, or just something that is prompted in your brain, just jump into the sort of question box through the software and give me a question. They come through just to me directly, anonymously, so ask anything and we can just answer it as they come up, because I'm just conscious that I want to help you as much as I can.

So today's presentation is all about aligning your marketing tactics with your business objectives. If you've been listening to this series of webinars, you know, we have - we've really talked through sort of how to build a marketing practice from the ground up. We started with how to get it on the agenda, so how to convince your CEO and Boards or the decisiony people why marketing is important. And, you know, I'm biased as a comms nerd, but it is very important. We then went through why and how to create a marketing strategy, and then how to do a plan. And then we talked in-depth about tactics.

Today is our final webinar, and it's really a sort of a summary of where we've been, and sort of condensing it all into a few key lessons that you can take to sort of go and achieve many unlimited successes. So if you've been listening before, this will be a really good consolidation of learning, but if this is the first time you're listening, then good job. You're sort of cheating in a very exciting way where we're sort of going to cover everything really quickly.

So we'll just crack in.

# Slide 3:

## This webinar will cover

So as I say, we're going to talk about just overview, developing a marketing strategy, why do it, then what is the go with the plan that sits underneath that, and how are the tactics that are doing it, and then how do you align your business objectives with tactics.

So the thing we want to walk away with today is an understanding of sort of what do you need in that briefcase to do marketing, and it really is this: You need a strategy to explain why you're doing it, a plan that says how, and tactics that give you the ability to do it really well. And the thing you really need is to make sure that it's all aligned to your business objectives.

# Slide 4:

## Video: developing a marketing strategy

Marketing is not something we just do for attention. It's something that we do because it is an efficient way of driving the objectives of our overarching business.

# Slide 5:

## Developing a marketing strategy

### [Begin video]

Stefan Delatovic: Account Director @ Think HQ

Hi, and welcome to Lumin. This course is about developing a marketing strategy: Not a plan, but a strategy.

So what's the difference between the two? Put simply, your marketing strategy is the thinking, and your marketing plan is the doing.

I'm Stefan Delatovic, account director at Think HQ, and together we'll look at all the things you need to consider when it comes to developing a marketing strategy. Get these right, and your strategy really cannot fail.

# Slide 6:

## Why have a marketing strategy

So let's start with the most basic of questions: Why have a marketing strategy? Because it gives you a framework for implementing all of your marketing plans. It ensures they're aligned, and that they're working like you want them to. Your strategy should lay out your marketing goals, which are shaped by the overall goals of your organisation. If you do that, you'll have assurance that your marketing is working to achieve your big ideas.

# Slide 7:

## What's in a marketing strategy

That brings us to what your marketing strategy has to contain, because stating the goals or objectives of your marketing activity is where you want to start. What's the purpose of your organisation's marketing, and what is it going to achieve?

For example, a disability service provider looking after three suburbs might have an overall goal of increasing its footprint and its client base, ultimately raising revenue. Your marketing strategy needs to identify goals that drive that expansion. Your marketing strategy describes your services and products, it profiles your clients or customers, and identifies any competition. In other words, it describes your marketplace.

Importantly - and here's the answer to why have a marketing strategy in a nutshell - it lays out the marketing activities that best achieve your organisation's vision, mission and overarching objectives, and serves as the foundation for all your communication campaigns. It also outlines the budget you need for all marketing activity, which is obviously a big deal. No one's going to sign off on a marketing strategy without knowing what it's going to cost. What will please the most, of course, is what it's going to return.

As we work through this process, it may sound a bit commercial, as we'll be talking in terms of customers, clients and markets, but that's because profit-driven operations have done a lot of work in this area, and we want to benefit from that and apply it to the good things that you're doing.

And to finish, remember: Your marketing strategy doesn't exist in a vacuum. It's working to support your business plan, your vision, and your brand, so it must link to all of those.

Next, we'll look at the research you'll be doing to get started.

[End video]

# Slide 8:

## Let's recap - why have a marketing strategy?

So, what did that frankly attractive man have to say in that video? You know, a marketing strategy, it's the thinking, and your plan is the doing. We're about to watch another video which goes into the plan.

The strategy - it's important to have both, and a lot of people wonder, sort of, "Is that too much work? Are we overcooking the cake?" sort of thing. But it's - in my opinion and experience, it's important to delineate the two, because your strategy - that's the thinking, like, "Why are we trying to do this?" - that's what you can use to manage up to leadership. This is why this exists, and that allows you sort of creative freedom to outline the vision.

And then in the plan you get around to sort of the dot points of how we do it and that sort of thing. It gives you a framework for implementing a marketing plan. In a previous webinar we had a question, sort of, "Do you need a different strategy for each activity, for each campaign?" It really is mapped to the footprint of your service delivery. But if you have an overarching marketing strategy for your organisation, for example, that frees you up to have a really good, crunchy plan for each activity that you're doing without having to sort of start from the start every time.

You want it to lay out your goals, including - it really needs to include a summation of who you are and what you're doing. You know, good marketing is just a way of selling your activities and presenting the best that you have to offer, so as part of this strategy you really want to be articulating who you are and what you're doing, and then what's the story that we're telling to our audience and our customers and our clients? It outlines marketing that achieves your vision.

And importantly, you know, it does all the boring stuff, like it says how much money it's going to cost and who's going to do it. And resources is an important one. If we look at something like social media, for example: That is perceived as, and it is accurately perceived as a very cheap enterprise. Like, you can run a Facebook page, for example, without a lot of financial outlay. But you really want to be careful that you're accurately forecasting the resourcing that will be involved in that. You know, if it's going to take someone 40 hours a week to really run that Facebook page, that's important because that is an outlay of resources. That costs money for that person. They're doing that at the expense of something else.

# Slide 9:

## Video: the Tipping Foundation - marketing under the NDIS

[Begin video]

### Graeme Kelly:

The Tipping Foundation was established in the early 1970s by a man called Bill Tipping. He was a very prominent journalist with the **Herald Sun**in those days. He and his wife Marjorie had a son, Peter, with cerebral palsy. Very challenging time for the family, particularly because the services available to that family were really poor, and Bill and his family said, “Well, we can do better.” And that's essentially the Foundation was set up for one family. Now we support over 800 families across Victoria, broadly speaking in supported accommodation, so houses where people can live together where our staff live with them and support them in the work that they do, and then more broadly people who live in their own homes where we go into their home and support them on a less frequent basis generally to live their lives in the community.

### Jane Emery:

Historically the sector and Tipping were working within an environment that was business to government. So over the last few years and with NDIS it has moved to business to consumer, and as a result marketing has to play a part in that, because consumers are given a choice.

### Graeme Kelly:

In preparation for that we knew that we had to look at what is our offering? What is it that clients, customers, participants, whatever term you want to use, at the end of the day what do they want, and what can we provide to them? So it's a core communication and information need that wasn't properly met. And one way of doing that was to strengthen our capacity, in broad terms what we call marketing, so we elevated one senior executive role to pick up that responsibility.

### Jane Emery:

So we did a little bit of community research a few years ago, and we found that awareness levels for organisations were quite low, even unaided awareness, and the biggest, most striking thing was so what differentiates organisations. I think that set us on the path in terms of saying, "What is going to make us different to any of our competitors?" We do need to have something that says, "You're Tipping, and you deliver on an experience that is different to somebody else."

### Graeme Kelly:

One of the pieces of research we’re finding more and more here is clients' families still really value the face-to-face human interaction. No matter how good your technology or your shiny bits are, you've got to have the genuine relationship with clients and families, because it is such an intimate relationship. The work that we do at times is enormously privileged in access to people, and the work that we do has to be built on trust, has to be built on real human relationships that are strengthened by the marketing communication stuff. But that's not the focus. Never lose sight of what the organisation's trying to do. Marketing is important, whatever you want to call it, but it's a means to an end. It's not the end.

### Jane Emery:

In terms of understanding client needs and then having our services reflected in that, we are now looking at going out and filming particular clients where we're delivering on those needs and then sharing that with other clients to show them what services we offer in particular. So an example would be in behavioural support. We would talk to a family about what we're doing in that area in terms of behavioural support for those clients to achieve their goals.

### Graeme Kelly:

The thing that cuts through all of this is word of mouth recommendation, because if you think about your own situation, if you're wanting to purchase or to engage a significant human service, doctor, a lawyer or whatever it might be, or something that’s going to really impact on you and your family, you often will seek the advice of others in your own family or beyond or those that are already party to it.

### Jane Emery:

When we developed our latest strategic plan, within that it has our vision for 2020 and it has a competitive advantage, and that advantage is delivering exceptional experiences. We will often talk about now: We deliver those exceptional experiences even now. It's a matter of delivering them consistently, and that clients will be able to come back to us and say, "This is what they've done a little bit differently," or "This is what..." And that's - and it'll be a whole lot of things that'll bring that exceptional experience to life for everybody, not only clients. It'll be staff. It'll be philanthropic trusts. It'll be other key stakeholders, the universities we work with.

### Graeme Kelly:

Marketing or communication or engagement with clients and families is everyone's responsibility. Marketing people, so Jane and her team, are resources that you draw upon to do that, but we need the direct support workers in Bairnsdale, in Swan Hill, to have good relations with their current clients and families such that those people say, "Hey, Tipping's a really good organisation. It supports our family well."

### Jane Emery:

Allow marketing people to do what they're good at. You know, in a lot of instances you have committee decisions, and if marketing people really know what you're trying to achieve, let them do it. The second point is if the marketing person is not on the Executive team, you must be aligned with somebody at that executive level so you can deliver what's required for the organisation. The third one would be don't think that it's just NDIS you have to solve. It is a longer term program. When NDIS is rolled out in 2020, you want to be moving your brand along to the next stage. And the final one is don't think you're going to get given lots of money. You are never going to have lots of money. We had a presentation a couple of weeks ago that gave us a wraparound in a newspaper, and you can't do that. It's a not-for-profit. The money must go towards the clients, so we look at maximising any dollars we have as economically as possible, that is going to get the biggest bang for its buck for the clients.

### Graeme Kelly:

I don't use the term "Marketing" personally. I find it in our sector at this point it's still seen as a bit of a turn-off. It’s still seen for some as a commercial shiny sort of approach to dealing with people. It's not, and if it's approached the right way it can add significantly. We still call it community relations because that still captures the fundamental activities that it involves. We see it from our organisation to spread or expand our offering to clients. That's based on what they've told us. That goes back to our work we did with our clients and families, it was probably now five years ago, around our strategy. What are we doing over the future for this organisation? What's important to you? What are we hitting well? What are we missing? What can we do better? The NDIS was involved as key background, but it's only part of it. At the end of the day we're there to provide service to meet client need, and if we're not, what do we need to change to do it better? So there are a couple of areas we have picked up, new areas of activity around behavioural support programs particularly, and some [inaudible] coordination activity, too much complication and detail. That was based on feedback from clients and families, so it's real intelligence based on mostly face-to-face interactions with our staff who would then feed back into the organisation to say, "There's a market for this. There's a need across Victoria to expand these services." So that's essentially what we've done.

[End video]

# Slide 10:

## Let's recap - why have a marketing plan?

So, to recap what we learned there: Why have a marketing plan? You know, at a high level it helps you understand your market. The marketing plan is really about - and we sort of talked about it in the webinar on that subject, but a lot of the work that goes in there is just getting a really good understanding of everything that you are doing, why you're doing it and who are you doing it for.

The biggest barrier for good marketing is the ability to target your activities really well, and that often comes down to, for many organisations, particularly if you haven't had a developed communications practice or a marketing practice - and we see this a lot for people who have gone, say, for block funding, where, you know, their major stakeholders have been the government and then moved into more of a sort of a client services model where suddenly you're in a position where you need to start marketing and advertising your services to clients and on a granular level. You're often doing stuff that you understand is working really well and that has value, but you've never - it's never just been part of your thoughts to articulate that, and that act of articulating it is just a good exercise in understanding why you are doing things, who your audience is and who you need to talk to. And once you've developed that, you can really start iterating the process quite smartly.

And it helps you - as we say here - it helps you plan and focus on sort of what sets you apart and where you are positioned, because in terms of marketing it's just about, you know, who are we? Why would somebody want to hang out with us, and what sets us apart from the pack? Like, what is our unfair advantage?

If we look at that next slide, we - and then we want to look at sort of what's working, what's not working, and what are the gaps? So what are we using at the moment? Like, are people visiting our website a lot? Do people visit us on social media? Do we get a lot of sort of newspaper attention, for example. But also just generally in the business, like, do customers and clients - are we meeting their needs? And beneath that, do we know if we're meeting their needs? Like, have we - if we're servicing the same clients year in year out, have we ever sort of sat them down and asked what they think about us? We must be doing something right if they're sort of coming back to us. If there's a big turnover, why do people leave?

So a lot of it is just the research, just sort of finding out what do people actually believe about us out in the world? And what are the systems and processes we can set up to easily gather this information in the field as we go along? Because I think the other key thing to keep in mind here: Marketing does not have to be a brand new discipline with five new staff and a new department and we need to be putting a documentary on during **Home and Away** or anything. That's good if you've got the resources to, by all means go for it. But in terms of the way to get started efficiently without enormous outlay is just identifying what's the best thing that you're doing, and what are the simple little things we can do to add a bit of communications onto that. So if we run events and we think that they run really well, how do we advertise those events to our audience as a way that works as marketing? So you don't have to build a whole new practice in your organisation. Just find smart ways to sort of show off where you can.

And I think another thing that was in that video that gets overlooked a lot is that building of team knowledge. Again, I'm biased because I'm a communications person, but in my experience when communications and marketing is positioned sort of at the decision-making table of an organisation, so when the Board are making decisions, is there a comms person in the room? When the Executive leadership team is talking about where to go, comms people natureally, like, if you run everything through a lens of "How will we communicate it from the start?" you start to build a really nice - you know, there's a knowledge base for the organisation. You'll be able to really quickly articulate to people where we're headed, and that means a lot for a team internally.

In terms of your internal communication, strong marketing which accurately articulates where you are headed in the next sort of six months to a year, 10 years, that's really valuable for your internal teams as well, because there's nothing staff and volunteers love more than feeling like they're actually authentically on the journey, and getting an announcement at the same time the market does makes them not feel that way. Like, if I work somewhere and the CEO puts a newsletter out that says, "We've got an exciting new initiative that's going to change the way that Stefan's job works," and I find out at the same time as my Mum, who's a customer, I'm upset. I'm at least confused. But if this information is flowing naturally all the time, then I feel like I know where we're headed and it really binds me to the brand of the organisation.

By embedding it as that management function as well, by thinking of things through a lens of "How will we communicate this once it becomes public?" you will start to build a much nicer sort of reputation/risk mitigation framework in there. By just naturally thinking about "What are we going to say about this?" you start to become a lot more conscious of your reputation and how will this impact the way people perceive us and the level of trust we have. And for organisations such as yours, trust is a currency that you need to treat really seriously. If you lose the trust of your clients and customers, it's very hard to get back. And if you lose trust you'll lose support and financial stability very quickly. Marketing is a good way of building and retaining that trust.

# Slide 11:

## Tactics

Going forward into tactics for doing it. So you've got your strategy - why are we doing it? - and a plan - how do we intend to do it? Tactics are the crunchy, like, "I will press this button and twiddle this knob," and all that sort of thing to get marketing happening.

The big thing for me when building out this infrastructure of a marketing practice is your tactics need to drive your business objectives. So if we look here, a couple of tactic types, for example, is like online, events, collateral. You know, we might have a website. We might have a seminar that we run, and at the seminar we will give out pamphlets. Let's say we're doing that. What you want to be in a position as - you may be running, you know - you are - if you have stewardship of this marketing practice in your organisation, you want an ability to talk to people at every level of your organisation, particularly, say, the Board or Executive leadership right down to the people who are doing the work, or volunteers on the ground. You really want to be able to show people a bright line between every little tactic that's happening out there on the ground, right up to, "This is driving our sort of 10 year strategic plan." And the way you do that is, when you are building that marketing strategy, you identify objectives in that strategy which are clearly aligned to and driving those organisational objectives.

We're going to go through some examples of that in the end, but the important part there is that, by doing that, by having an organisational objective at the top which then is driven by a comms objective, which then is driving a number of tactics in the plan, it allows you that when someone goes, "Why are we putting all this effort into writing blogs for LinkedIn,” for example, you can very quickly go, "Oh, that's because that drives strategic pillar number 6 in our sort of five-year action plan." And that's a really powerful thing to have, particularly if you are in a position where you are building the case as you go that this marketing thing is something that's worth investing in.

# Slide 12:

## Online channels

So we just want to go through a summation of some of the channels that you might want to use.

Online channels are very big. Like, I think, you know, increasingly the idea of, like, segmenting stuff into digital gets more and more disingenuous as we go along, because the more we go along everything's sort of digital in some way now. But in terms of sort of pure online stuff, social medai is a very big channel, and it's characterised by a) it's quite cost-effective. I like social media a lot as a way to get started in marketing and communications, because someone else has already done all the very boring work of setting up the platform. A facebook page, for example, you don't need to build a website and everything that entails. You can just - you can set up a Facebook page or a group. Someone has done all the sort of infrastructure, servers and things, and you've just got to worry about, like, who's your audience, what message are you trying to tell them and how you're going to tell it. So that's a particularly powerful part of social media in my opinion.

I'm a particularly passionate fan of articulating “who is our audience and what do we need to tell them?" and then allowing the platform to emerge from that rather than the other way around. You see a lot of players in this space say, "Oh, LinkedIn is getting big" - and it is - but "LinkedIn's getting big. We need to get on LinkedIn," for example, and then trying to figure out how to feed to LinkedIn. Much better to sort of go, "All right, we need to get across, you know, middle management in small-size organisations," or something, "and we think they're probably on LinkedIn, so we should go there." So it's always good to start with your message, your objectives and your audience, and then find the channels that best suit that, rather than just try to be on Facebook because it's a big deal. You know, Facebook's really good for sort of emotional connection.

Instagram is obviously dependent on imagery. If you're a very visual organisation, Instagram is very good, and it's very popular right now.

LinkedIn is where people go to sort of think about their career and professional development, so if you're looking to talk to people through a lens of employment or development, or if you're looking to talk to sort of HR or people that are employing people or thinking about job creation, LinkedIn's a very powerful place to go.

And Twitter is generally most powerful - Twitter's sort of the scariest one because it's where most of the bully weird people are, but Twitter is very popular for journalists and politicians, so if you are looking to talk to those people I would recommend Twitter as a goer.

Facebook is generally a good place to start, because it's got an enormous audience there. There's a bit of a scandal happening with Facebook at the moment so we'll see if that changes, but at the moment it's a good spot.

So I've just had a question come in asking for clarity on marketing tactics that should be aligned to business objectives or should it be the other way around? Generally speaking I'm a big - you know, you want - you'll have a - it's - tactics should be aligned to objectives, but it should be a sort of end-to-end process. So, again, we'll sort of talk about it at the end, but if your existing business objective is to grow your client base, for example, then I would be looking to create a marketing strategy that drives that objective in some way, and then the tactics are flowing down from that. So in - that's what - when I say your tactics should be aligned to those business objectives, that's sort of what I mean. It should be a step-down process that, you know, "Oh, we're on LinkedIn because we ultimately want to drive more clients in this place, so that makes sense." So I hope that answers that question.

Other online channels: EDMs, which is just electronic direct mail or emails. So email newsletters are very popular and can be very powerful, and particularly for sort of people in workplaces is a dominant channel. And the ability to sort of - it's a pretty common - it's one of the big all-time objectives of sort of marketing practices is to gather peoples' information and email addresses to get them onboard with your EDMs, because the great thing about a newsletter, legally you have to give people a way to opt out of it, but it means that you can be confident that the people you're emailing to have opted in to receive this information. So if you can generate a list of people who are supporters of you, who have signed up to your newsletter, you're allowed to talk to them in a much more sort of genuine, direct way because they're allies, rather than just throwing an ad out into the void.

Websites are an enormously powerful channel that you own. These days, you know, increasingly if people want to know - if people recognise you or your service they will Google it. They will Google your name if they know you, or they'll Google what you're doing and find their way to your website. Your website is, you know, it's a curated space that you own holistically, so you can deliver whatever message you need to in whatever way. It's important to really think about, when building or remodelling your website, that user journey that people are taking. What do you want them to do? You know, if you want people that visit your website to donate to you, you need to - you know, I would consider having a big button on the front that says, "Donate to me right now, please," for example. It's very common for people to sort of build a website, just a way that they think they should work without thinking about what the objective is. Similar to all of this marketing activity, what is the business objective that you are driving, and that needs to inform every little decision that we make. If I come to your website and you want me to sign up to be a volunteer, I should be able to quickly find information that compels me to volunteer. It shouldn't be hidden sort of behind the About Me page on page 79.

Blogs are a really powerful way of marketing, and this is often - you know, you can write blogs on, like an article on LinkedIn or you can create a news site, a news part of your website. They're particularly powerful because people want, you know - I think the general rule of thumb in sort of marketing and advertising is people generally need to encounter you six times. They need to find your message six times before they're going to act on it. So if you've got a website which perfectly articulates who you are and what you're offering but it never changes, people are unlikely to visit six times. They'll visit once and they'll have a look and go, "That's interesting," and then they'll come back one more time to read the rest of it, and then that's it. And they probably like you, and some of them click Subscribe and some don't. By having a blog part or a news site or some section which has sort of, is updated every couple of days with interesting things, I'm creating an opportunity for people to visit regularly. You know, they may follow me on Instagram. Every week they get a post on Instagram which says, "Oh, we've updated our blog. Click here to check it out," and then they come back. And that's generating opportunities for people to touch your brand over and over and over again. So websites that have a blog or a news site or are updated regularly like that do get better traction than otherwise.

And apps, they're very powerful but expensive, I would say. If you talk to Facebook or anybody, the two main things that are driving sort of the online space at the moment is video. People love videos. It's increasingly the thing, like, metric-wise, the content that people are most engaging with is video. But the other enormous thing characterising the space is mobile. You know, an increasing number of people are dominantly visiting the internet on their mobile smartphone rather than a desktop computer, and an even bigger amount are doing both. You know, I do a certain amount of internet thingamajigs on my laptop at home, but I'm also on my phone every 10 seconds, and whenever I commute I'm looking at it. So your content needs to work on a phone. So websites - any modern website these days needs to be built to be viewable on a phone. And an app is a really powerful way of getting into that person's phone. I generally don't recommend it as, like, the first thing you do in a marketing sense, just because an app is quite expensive to build, and particularly if you need to build one for Windows phone and Apple and Android, for example. There's a lot of development work in there. So start with an adaptive website. That sort of meets a number of needs, but if you've got specific tasks that people are completing - like, people like an app where, you know, I'm visiting that app regularly to get information but also to complete some interaction with your business, then an app is really - people don't tend to keep an app which is just sort of a bit of an encyclopedia or something. They're unlikely to keep an app which is just your website and has info, because they can do that online. But if you've got forms that need to be filled out, or tools that they can use, people will keep that and that becomes a really powerful way for people to interact with you.

# Slide 13:

## Events

Getting into the actual world: Events. Events are really - they're often, again, they're sort of overlooked when people think about marketing, that people think about them as a bit of a separate thing. But an event is a really powerful way to do marketing, because it is, you know, it's reaching out to people in their lives and sort of physically interacting with them, which can be quite powerful.

So events, which could be, as we say here, public, private, business to business, and, you know, you could host an awards night for your sector. You could have anything from an enormous conference where you run it and you invite all your peers to give presentations for your customer base. Or it could be an information night that you hold privately. You know, my previous role was with the State Emergency Service where we were doing lots of volunteer recruitment as well as sort of community awareness about flooding. We would have very small events where, you know, an individual volunteer unit would have an information night where they'd invite people from the community to have a chat, and, you know,  have a - try on the overalls, that sort of thing. We'd also have big sort of public media launches where we would theatrically cut the Minister out of a simulated car accident or something, as well as taking part in sector-wide conferences.

So there's a pretty wide gambit of events that you could have. And again, like everything, they're just - the way that you would do it is driven by what the objective is that you are looking to do. So are you looking to raise awareness of your brand? Are you looking to send a particular message? Is there a product or service you want to promote? Are you looking to just celebrate? How do you want to position yourself? What do you want people to do? Who would you invite? That sort of thing.

Yeah, and they're also, events, like getting people together in a room can also be a really good way to foster collaboration across the sector and to build connection with your clients. An easy event, and a fun one, can be sort of identifying a demographic of your supporters and putting it as more of a workshop, where you're all working together to some kind of goal. That's a really good way of creating an emotional bond between you and this group of people, because they feel like they're part of your team.

# Slide 14:

## Collateral

Collateral is a big one. You know, this is just the tools and bits and bobs, the ephemera that convey your messages, and this can be a wide variety of stuff, but, you know, common examples: Printed material, you know, so it might be leaflets, the annual report, that sort of thing, or postcards, fliers, things that you can give to people that demonstrate who you are and what you're doing. Audiovisual material, so you may have, you know, a video on your website, some case studies that are sort of demonstrating what change you are bringing into the world. It could be sort of social media graphics and tiles, good photos of happy clients. A newsletter is an efficient way of getting the message out. Your business cards and letterheads. Taking every - any time you are sending a message, are you taking full opportunity of that conversation to get your messages out into the market, is what I would say.

So a business card is good, because it, you know, it's a common example that we don't think about often because everybody's got one, but it just means, you know, you meet someone randomly at the supermarket, you give them a card. That's a way of capitalising on that interaction. You know, we were just having a conversation. By giving you my business card I'm creating an opportunity for us to talk again in the future, and convert this conversation into, you know, a relationship or a sale or something.

And I would just, you know, collateral is about treating every - like looking at all of those different touchpoints you have with all of your stakeholders, and are we leveraging them to create possible opportunity in the future? So are they signed up to your newsletter? Can you give them, you know, if they're a happy customer, can you turn them into a case study that shows how good you are? Are you giving them a leaflet that shows what you're doing? All that sort of thing.

Award submissions are another good one in that, you know, when we talk about this in a - like a lot of the marketing we're talking about here is about your owned channels, so websites, social media, things that you have complete holistic control over. Another big angle of this is sort of third party endorsements, and that's the idea of media relations or getting a journalist to write about you, or getting some person that is not you to vouch on your behalf. Awards submissions are a big part of that. If you can win an award, it demonstrates to a wide variety of people, you know, someone else has judged this and said it was tops. So that's quite powerful. Similarly, too, you know, if a journalist writes about your service, people who read that go, "Oh, this journalist has looked at this with their journalist brain, which we assume is akin to some kind of computer, and they've decided that this is legit." And that's a very powerful - and people get - when people get a marketing message or they get a call to action, they're much less - they're less likely to act on that than they are to seek third party endorsement as a first action. If someone knocks on my - if I know my neighbour and someone comes to both of our doors and says, "I'm selling you, you know, free car servicing," I'm much likely to buy that if I know that the neighbour just bought it, because I trust them.

And I saw this again in emergency services, where you would send a community, say, a flood warning, like a message which is, you know, emotionally a bit taxing. People are worried about it. A lot of people would visit us on social media or call the press or call their Mum and just be like, "What are you doing about this? Are you going to evacuate? What should I do?" People want to know that their community supports something. So third party endorsement is something that I really encourage you to think about, because it's hard to get but it's enormously powerful.

Presentations fall under that banner as well. If you can be presenting at conferences and events and giving presentations, it also gives you that air of someone who is listened to, who leads thought in your space, and that's quite powerful.

It's important again to point out that, like, a lot of financial and human resource goes into the generation of collateral. I see it, again with social media but also with leaflets and stuff, that sort of intern syndrome of like, "Oh, this is just a bit of a minor thing. We'll get someone very junior to do it." That's fine as long as it's being driven by strategy and objectives. Again, everything you do needs to be able to roll back super cleanly to a point, and so if you're just giving it to someone, "Oh, can you just make our Facebook page interesting?" it would be hard to justify - like, that's fine, but show me the piece of paper that says that they are driving at business objectives. Once you've got that, by all means. And also, you want to manage up in terms of like, "We can do this work, but it takes time."

A great question's just come through about printed material and how important is it now that the world is largely electronic. I think that's a really good point. I think printed collateral is, you know, back in the day was just the thing you had to do to get your message out. It is much less necessary these days. I think a lot of people in quite influential leadership positions still really like printed collateral because it's, you know, when they came up it was a big deal. And it does certainly - like, I would caution against jettisoning it entirely, but again, it's just got to be driven by a point. Like, direct letters to households are oddly a bit of a novelty these days. Like, getting printed mail can be a bit fun, but it's rarely worth it because it's much more expensive than doing an email. But also there's a bit of tangibility there. So, yes, I would say that printed collateral is less - you would look at it and you would go with electronic unless you had a compelling reason to print it out and hand it out. And it depends on what you're doing. If you're talking to people who are not using the internet, then obviously printed collateral is really important, or people who - like, understanding culturally if people are just taking printed collateral to be a lot more important.

But generally I think electronic channels, it's fine to focus on them. Because the other advantage of electronic material and emails and websites and social media is there's a wealth of analytical data which sits under that now, which is really powerful to drive this marketing. So if I send you a letter, I send it to you and hopefully you act on it. If I send you an email - it can get a bit creepy, but if I send you an email newsletter I probably have the ability to understand, did you open it, and if you did, when? Did you read it? How long did you spend reading it? Did you click on things in there? What did you go to? And then when you clicked through to my website, where did you go from there? If that sounds like an Orwellian nightmare to you, then I can't necessarily disagree, but from a marketing perspective it's very powerful. You can map a user journey in a way that's a bit harder with printed material. So that would be my thing. And again, I know I harp on it a lot, but just it's objectives. What are you looking to achieve?

Don't get - I think there's - generally everywhere I've worked, at some point someone has asked me, "Can we have a magazine?" I've rarely ended up creating a magazine, because generally I find that's a bit of an emotive thing, that people just like magazines. They find all the electronic stuff a bit ephemeral. It's not to say I've never done the magazine, because some people have - we've talked about it and found that it does drive a specific objective for a certain segment of our audience. But again, it's just, "What are we looking to achieve? What are we doing to achieve it? How do we measure that we did it?"

# Slide 15:

## Producing content

Content - you know, my training is in newspaper journalism. There was a day where I used to be able to say that I was a writer who produced stories, but now I do content. I'm a producer who does content. Everything's content now. And that's because there is a lot more forms of - it's a good phrase, because we are all producing content all the time now. Like, my Mum is on Facebook all the time producing content, and she would not consider herself a publisher, but she is. So your organisation, no matter the size of it, you must produce content. So it's incumbent on you to use this sort of marketing strategy framework or a comms framework to make sure that you are producing content that is working to drive your objectives.

Because content marketing, it works. And we're talking about, you know, what are the words and messages that you're sending out into the universe that drive your reputation and your offering and that unfair advantage? Content marketing is the discipline of identifying how you want to be perceived, and then creating the messages that show that that is who you are.

So, you know, if you provide disability services to a particular audience, you want to be producing content which demonstrates that you know very well what you're talking about. You may put up - let's say you were going to produce six pieces of content. Maybe it's videos, maybe it's blogs, maybe it's Facebook pages. You may decide that two of them are you describing how your service delivery works, two of them are describing things you like about your community that you service, and two of them might be more esoteric, like, "Here's where we think the sector will be in five years." By producing those six bits of content, if you've done it well, you have demonstrated to your audience that you are an expert in your field, you know the - they can come to you for the ins and outs of how to get the service that you are selling, you are a committed, informed member of the community that you are serving, and you also have the vision of where your whole sector needs to go. So you are, frankly, a genius. So if I'm a member of your community, by reading those six bits of content I come away knowing that you just care. I should call you because you know what I need. You know about where I live, and you know where I'm going. And you can see that that can be quite intensive, but it's very powerful in terms of demonstrating who you are.

And yeah, producing content, when it's shared can reach an even bigger audience. This is sort of the power of social media, right? You want to send a message that people like, can see themself in and that they're willing to share to their network as well. This is also the underpinning of the media relations. Talk to one journalist, get them interested, they'll tell an entire community.

It's a bit more of an art than a science in terms of developing that news sense, you know, what - being able to understand who your audience is, what motivates them, and what they're interested in. You know, your - the people that you surround yourself with are probably stakeholders, family, clients. Don't be embarrassed by your audience all being in the tent. You want to identify sort of that perfect news story which appeals - that they see themselves in so much that they want to sort of project it to their friends, to show off almost if that makes sense. So what's the story about my client that they go, "Oh my God, that is so me. I need to tell my friends about this." And in doing so, they are projecting your messages to a wider audience.

That's the sweet spot. And if it sounds hard, it is. It's - the ability to hone a story, and the only way to really learn how to do it is to just talk to your audience a lot. When I was training journalists to write feature stories, one of the simplest, like deceptively dumbest lessons but most powerful, was just, once you've got all the information that you want to send to someone, like, you know, you've got a thousand words of notes and you need to turn it into a feature story, before you start writing it, just turn to someone next to you and tell them the story, and by verbally telling someone a story you will be able to see the moment that their eyes glaze over and that they start checking their phone and stuff. And it will just - you will accidentally order it in the most interesting way.

And so this esoteric idea of news sense and developing that really is just that. It's just the ability to understand what you're going to tell someone where they really care about it, and knowing that it's better to write a hundred words that someone finds interesting than 500 words that gets all your messages out in a way that people will want to jump off a bridge to get away from you.

Another important part about content: You don't want to be just slamming people with advertising material all the time. You want to present yourself as a partner, and an informed facilitator, I would say. So, you know, every third message may be an overt ask, you know, "We are doing this. We provide this service. You can buy it. You should buy it." But the other two should be sort of human stories about what you are thinking about, why what you do is important, an example of a client whose life is better because of you. This is the stuff that builds your reputation so that when you make an ask to someone - you may be looking for a donor, a volunteer, a client - you just think - when you knock on someone's door and say, "Can you help me?" or "Can I help you?" that conversation is much easier if they know you, and so put a lot of effort into getting people to know you before you say, "Give me a thing."

Testimonies and case studies are a very effective way of doing that. This Beyond Blue man therapy campaign, I'd encourage you to just have a look at that because that's a really good example. You know, men are a particularly hard audience to approach when it comes to sort of brain and emotion stuff, just because of our, you know, societal history forever, but this is a good example of how, you know, if you're looking to get an audience onboard with a complicated or an embarrassing or an odd subject, just telling them a story of someone that they recognise as similar to them and that their life is better because they're doing the thing you want them to do is a great way of doing it.

Testimonials: Again, this is this idea of you don't need to build a whole new marketing team that's on three levels and have a ping pong table or anything. You just need to identify what's working and tell everybody about it. So a testimonial is a really good example of that. You will have - you know, find your top five clients, the ones that you enjoy visiting because they love it. Everything's working. You're giving them exactly what they need, and they're happy to tell them about it. Get them to provide a testimonial. You know, interview them, record them, just get some words saying, "This is great and I think everybody should get it." And that's content that you can then use on your channels to sort of show people - again, that's leveraging an opportunity. You know, like, "We've got a good client. How do we make that into a comms marketing thing?" It's third party endorsement as well, like, it's a client who's, you know, saying, "I think this is the right thing for you to do." You know, it's hitting a number of different things, and that's the stuff you want to look for in terms of building a practice which is sort of sustainable.

Yes, agreed. And use the COPE principle, you know, effective, efficiency: Create once, publish anywhere. Like, if you end up with a testimonial,  if you've got a picture of someone and a couple of words from them saying, "I really like this organisation," look at every channel you've got and put it everywhere that it works, maybe not all at the same time but over a couple of months. You know, if you've got a really great, cracker piece of content, don't just put it on Facebook once and then never use it again. As we've said, people need a message six times. Don't be embarrassed about putting the same thing up over and over again. I think I see that a lot. Like, people will put, you know, they'll go, "Oh, we need to keep the Facebook thing going," so they'll produce seven bits of content, put it up and then it's gone forever, and then they spend another month building up another week's worth of content.

Because of the way all these channels work, you are not - it's very unlikely someone is going to see everything you put up all the time. Don't be afraid of reusing content. Just sort of alter it a bit, maybe change the first line. But it's just good practice to keep pushing the same messages over and over again, because it takes time for people to understand what you're on about.

# Slide 16:

## Aligning your tactics with your business objectives

Now, finally, just a few examples that sort of tie it all together. So we've talked about all the things, and this is really just trying to sort of drive home that idea that I'm particularly nerdy about, which is, "What is the tactic that you are doing, and how are we mapping that to our business objectives?"

So you may have a business objective - here the example is, you know, increase our client base by let's say ten percent across Ballarat and Bendigo. So you may work in those areas. You have a sort of organisational strategy which has that as one of its objectives in it. So this is before there's any thought of marketing or comms or anything. Like, you just want more clients in Ballarat.

So how are you going to get there? So I - because I'm a big fan of, in your marketing strategy you want to have objectives there which are driving these business objectives, but you want to avoid the trap of just bringing your business objective directly into that marketing strategy. Why is that? Because, for example, increase client base by ten percent across Ballarat and Bendigo, communications alone cannot achieve that objective. It's an important part of it, and your marketing strategy will have objectives in there that drive that, but if you were just to put that directly into your comms strategy it's a bit of a recipe for failure.

Remember, at the end of this we want to be able to track how we went, and how effective were our communications. The communications objective that underlies that may be to create more contact from potential clients to generate leads, for example. So you may have objectives to increase visitation to the Contact Us page on your website by ten percent, or you may have, you know, to create a calendar of events that we run for potential clients in the Bendigo area in the next financial year. These are the marketing objectives that drive that increase in a client base, but what you hear there is that what the comms can do is identify clients, talk to them and encourage them to contact the business. It is another part of the business, and another function, which will turn those leads into conversions and customers. So that's why I talk about having to separate the comms objective from the overall one, because you don't want to promise everybody that you can increase the client base. You can increase the leads, and you'd much rather be in a position two years down the line when you're evaluating this to say, "We generated the amount of leads that we wanted, and it's not our fault if Johno in the next room didn't answer the phone," for example. You want to make sure that you are really drawing a bright line around what you're doing and taking autonomy of that.

Had a question come through about any advice on marketing segments of the business, not everything? I think that's really smart. Again, we want to build sort of a sustainable practice, and I think that's part of just eating the elephant a bite at a time. And I think what you're looking to do in all things is to provide as tailored a message as possible to an audience. So I would definitely identify what are, like, the three main - you know, identify a single part of the business and why it's relevant for a particular audience and market that to them, rather than feeling like you have to - it depends on the scale of the enterprise, obviously, but if you say, if you've got an arm of the, a part of the business which is providing disability services, someone else may be providing employment opportunities, someone else might provide disability awareness training, you would be well advised to segment those off and - you may have an overarching strategy but you probably have a marketing plan for each one. I think that would make an enormous amount of sense, because they've each got different audiences and they've probably got different objectives. So I don't think - I think a good part of sort of the plan is having those key messages, like what are the three or four messages that we're looking to drive into the minds of this audience, and so I think getting it segmented as possible is really good.

And so make one of the - if you're looking to segment it off and teach a different part of what you're doing to different groups of people - and some of them might be customers, some of them might be Ministers, because you're looking to influence policy - having those key messages, and then just making sure one of the messages is an umbrella statement which teaches people who you are, so that you can do very specific marketing work and then at the end also drive a secondary objective of brand awareness. So you may talk specifically about, "I'm here to talk to you about this specific thing, but on the way out the door you should know that we also do all this other stuff if you're interested." And that way you sort of achieve both things without losing fidelity.

So this example of, you know, if we're looking to increase client base across Ballarat and Bendigo, we may have those objectives of generating leads and communication with potential clients, and so some of the tactics that may roll down to is, you know, information events in the area or neighbouring regional towns, producing regular updates on social media specifically calling people in those areas to contact us, and, you know, brochures and physical collateral that we may, you know, drop around in cafes and that sort of thing.

So in that way you can imagine that, you know, the sort of - I like to run everything through the idea of a stereotypical sort of semi-detached Board member, for example. You know, someone who's really committed, they come to the Board meetings, but they're on twelve boards so they don't quite know exactly what - you know, they know where we're headed in twenty years, but they don't know where we're headed in ten minutes. So if they sort of come in out of nowhere and say, "Why are we running this information night, you know, in Ararat? What's that all - that sounds ridiculous," this gives you the ability to very quickly go, "Oh, we're looking to increase our client base in Bendigo by five percent, and that rolls up into our comms objective of generating leads, and so we've got this event and we're going to have people signing up to the newsletter there." It's much better than just going, "Oh, I don't know. We just want to have a crack."

So this one, you know, this next example is about retention. We may want to keep the clients we've got in Geelong. Retention is another important one. Marketing tends to get really focused in on generating new human beings and new customers. It's a lot less effort to keep the clients that you have than it is to generate whole new ones, so make sure that you don't lose sight of - you know, love the one you're with before you go out and find other people.

Tactics that could drive that? You know, again, if we're looking at retention and keeping it, I think retention, sort of the comms objectives are really about creating an emotional connection with those clients and creating a sort of feedback loop and sort of two-way communications. So that can really come down to, you know, phone calls, face-to-face meetings, newsletters. We're looking, here, the tactics and the comms objective of that is really about "How do we create an environment where our existing clients feel bound to our organisation, and feel like they trust who we are and what we're doing, and that they're involved?"

# Slide 17:

## Where to from here?

And that is this webinar. I'm going to click this button, and I think that is an accurate depiction of what we've achieved here today and in this series, and I just wanted to sort of talk to sort of where from here.

I've really enjoyed presenting these webinars, and I hope that they have been helpful. And certainly the calibre of questions and feedback I've had during the sessions has been sort of really powerful, and I think you're all clearly sort of engaged in this topic and thinking about what to do in a way that's very exciting for me as a big communications nerd. So if you've listened to all of these, hopefully you have - it's given you a bit of a starting point to think about sort of where to go from here.

# Slide 18:

## Get in touch

If you're still a bit worrisome about what to do, I would encourage you to just shoot me an email or drop me a line. I'm happy to talk about this stuff. The slides will be provided to everybody in the not-too-distant future, so you'll have access to these and all of the presentations. If you're still looking for advice, let me know.

# Slide 19:

## Lumin

The other thing I just wanted to flag, you know, the two videos we've shown today are from this website, Lumin, which our Think HQ agency has just launched a couple of weeks ago, and that is designed as a place - it's an online learning platform where people such as yourself can learn, can do those courses that will teach them the fundamental ways to do marketing, communications, public relations, all that stuff. So I'd encourage you to go and have a look there. There's quite a bit of free content there, but there's also plans if you're looking to get more involved. And that takes you through, you know, I present on developing a marketing strategy, as well as the fundamentals of storytelling if you're looking to create some of those compelling case studies and content pieces, but there's also producing video content, strategy, all kinds of bits and bobs. So that gives you a place to sort of go to from here.

# Slide 20:

## Get in touch

With that in mind, thank you all once again for your time. I've really appreciated it, and I hope we get to talk in a way where you can sort of talk back again in the future.

Thanks.

# Slide 21:

# National Disability Services

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