



# **SPREAD THE WORD**

**Marketing Self-Management Education  
Through Ambassador Outreach**

National Center for Chronic Disease Prevention and Health Promotion  
Division of Population Health



The Centers for Disease Control and Prevention (CDC) Arthritis Program has developed *Spread the Word: Marketing Self Management Education Through Ambassador Outreach* to help increase enrollment in self-management education workshops by word-of-mouth recommendations. This guide was designed to help organizations that offer workshops to implement Ambassador Outreach in their communities.

All materials in this guide are available on the CDC Web site at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach).

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# SPREAD THE WORD

## Marketing Self-Management Education Through Ambassador Outreach

CDC research has shown that many people, including those with arthritis, do not know that self-management education workshops exist in their communities. They also prefer to learn from people like themselves who have experienced and benefitted from self-management education workshops. The goal of the Ambassador Outreach Strategy is to increase participation in these workshops by using community-based Ambassadors to promote the workshops and create interest through word of mouth.

This guide gives step-by-step instructions and guidance to Coordinators on how to find and train Ambassadors. It also gives Ambassadors ideas and tools for marketing self-management education workshops.

U.S. Department of Health and Human Services  
Centers for Disease Control and Prevention  
National Center for Chronic Disease Prevention and Health Promotion  
Division of Population Health  
Arthritis Program





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# INTRODUCTION

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People who have different chronic health conditions may face common problems, including high costs in both economic and human terms. In 2005, 133 million Americans—almost one out of every two adults—had at least one chronic illness.<sup>1</sup> People may have more than one chronic condition—for example, 52% of people with diabetes and 57% of people with heart disease also have arthritis.<sup>2,3</sup>

The Centers for Disease Control and Prevention's (CDC's) Arthritis Program has identified several effective, evidence-based, and low-cost interventions that can reduce arthritis symptoms and improve quality of life.<sup>4,5</sup> Many of these interventions may also be appropriate for people with other chronic conditions.

Although these interventions are available through state health departments and other organizations across the United States, participation is low. Research has shown that most people do not know that classes are available in their communities to teach them about chronic disease self-management.<sup>5</sup>

CDC has developed the Ambassador Outreach Strategy to increase participation in self-management education workshops by using community members who serve as “Ambassadors” to promote the workshops and generate interest through word of mouth. The goal of this guide is to provide the guidance and tools to implement this strategy.

The Ambassador Outreach Strategy and this guide are patterned on CDC's *1-2-3 Approach to Provider Outreach: Marketing Arthritis Interventions to Primary Care Practices*.<sup>6</sup> The purpose of the *1-2-3 Approach* was to give health care providers information on why and how to recommend self-management classes to their patients. The Ambassador Outreach Strategy is focused primarily on teaching and supporting Ambassadors, who are successful graduates of self-management education classes, to recruit participants directly.

The guide will help Coordinators and their staff members

- Develop and implement a Coordinator's Work Plan.
- Recruit and train two types of Ambassadors—Person-to-Person Ambassadors and Spokesperson Ambassadors—to market self-management education workshops like the Chronic Disease Self-Management Program (CDSMP).
- Prepare Handbooks for your Person-to-Person and Spokesperson Ambassadors that include customized tools and marketing materials.
- Manage and evaluate Ambassador activities.

## WHY CHRONIC DISEASE SELF-MANAGEMENT EDUCATION?

The current health care system in the United States responds well to immediate medical needs such as accidents, severe injuries, and sudden bouts of illness. However, the health care system is not designed well for managing the needs of people with chronic health conditions. In 2009, the U.S. Surgeon General recognized the importance of community-based self-management education programs in helping people with chronic health conditions, citing the CDSMP as a key example.<sup>7</sup>

CDC's Arthritis Program recommends self-management education programs, including both the CDSMP and the more disease-specific Arthritis Self-Management Program (ASMP), because they have been shown to help people with arthritis and other chronic conditions. These programs are designed to help people with chronic diseases develop the knowledge, skills, and confidence to manage their conditions and continue to pursue the activities that are important to them.

Meta-analyses of the CDSMP and the ASMP demonstrate consistent and persistent improvements in self-efficacy; psychological problems such as depression, anxiety, or distress over health; and lack of aerobic exercise, fatigue, and social-role limitation.<sup>8</sup>

## WHY AMBASSADOR OUTREACH?

Many studies have shown the benefits of participating in self-management education workshops.<sup>8,9</sup> However, only a small percentage of people with chronic diseases actually participate in these types of interventions. For example, about 11% of people with arthritis report attending an arthritis education program.<sup>10</sup> Audience research, including focus groups and surveys, among people with arthritis has shown that most people, at least those with arthritis, do not know that self-management education workshops exist. This research has also shown that most people find out about available interventions through word of mouth from friends and family.

The findings from this research inspired a grassroots approach, the Ambassador Outreach Strategy, which uses community-based Ambassadors to promote self-management education workshops.<sup>5</sup> Ambassador Outreach is a systematic way to spread the word about workshops available in the community by building on word-of-mouth communication. It involves identifying, recruiting, training, and providing ongoing support for a network of Ambassadors.

Person-to-Person Ambassadors are trained to have one-on-one conversations with potential workshop participants. Spokesperson Ambassadors are trained to make brief presentations to community groups. Ambassadors also may talk with influential members of the community—doctors, spiritual leaders, members of community groups—who are in a position to recommend workshops to others.



### TIP

Word-of-mouth marketing depends on people talking to people. The credibility of the message depends on the credibility of the messenger.



## MARKETING SELF-MANAGEMENT EDUCATION WORKSHOPS

This guide is intended to help Ambassadors market or “sell” the value of participating in a self-management education workshop. Grassroots marketing, also known as *word-of-mouth* and *buzz* marketing, is a focused approach to educating members of the community about a specific product or idea. This guide uses the marketing term *pitch* to describe a compelling message on the benefits of participating in self-management education workshops. CDC research suggests that grassroots marketing can be effective in increasing awareness of the benefits of participating in self-management education.<sup>5</sup>

### WHAT IS AN AMBASSADOR?

Audience research suggests that the most effective messenger is a person that someone knows or a person who has a chronic condition and has benefitted from participating in self-management education workshops. Ambassadors are messengers from the community who can generate buzz about self-management education workshops. They represent the “voice of experience” and are likely to be living with chronic conditions and to have completed a self-management education workshop successfully. They can endorse and recommend self-management education and provide up-to-date information on how to attend a workshop.

Person-to-Person Ambassadors use individual relationships and conversations with friends, family members, and others, while Spokesperson Ambassadors share their experiences with groups of people and encourage them to enroll in workshops.

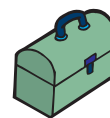
### HOW TO USE THE AMBASSADOR OUTREACH GUIDE

Although this guide, *Spread the Word: Marketing Self-Management Education Through Ambassador Outreach*, is designed to market the CDSMP, it can be used to market the ASMP or other self-management education workshops as well. In addition to tools for marketing the CDSMP, some materials that apply specifically to the ASMP are provided.

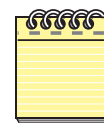
All tools are available online at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach) in PDF, Word, Excel, and PowerPoint formats that can be downloaded and customized for each Ambassador or promotional activity. In addition, tips and tools are designated by icons throughout the guide and handbooks to highlight supplemental information.



**TIP:** An idea that could help shape your Ambassador Outreach efforts.



**TOOL:** Handouts and templates to help you market self-management education workshops.



**LESSONS FROM THE FIELD:** Ideas or comments from other Coordinators based on their experience.

This guide includes three main sections that are designed to meet the needs of Coordinators, Person-to-Person Ambassadors, and Spokesperson Ambassadors:

- **Coordinator’s Guide.** This guide is for the staff members of the programs responsible for marketing and recruiting participants into CDSMP workshops. It includes information and tools for planning, implementing, and evaluating Ambassador Outreach efforts.
- **Person-to-Person Ambassador Handbook.** This handbook is designed to provide customized tools for Person-to-Person Ambassadors who market self-management education workshops to individuals.
- **Spokesperson Ambassador Handbook.** This handbook is for Spokesperson Ambassadors who work with groups of people to encourage participation in CDSMP workshops.

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# COORDINATOR'S GUIDE

## HOW TO USE THE COORDINATOR'S GUIDE

The Coordinator is responsible for managing the Ambassador Outreach Strategy at local, state, or regional levels. The Coordinator's Guide and Ambassador Handbooks were created to help local and state programs develop a grassroots marketing strategy to increase enrollment in self-management workshops, either through the Chronic Disease Self-Management Program (CDSMP) or the Arthritis Self-Management Program (ASMP). Whether a program is trying to fill one workshop in one community or many workshops in many communities, the method for marketing these activities is the same, Ambassador Outreach.

The Coordinator's Guide is a practical manual that shows you all the necessary steps for coordinating and conducting an Ambassador Outreach Strategy. There are three steps to coordinating Ambassador Outreach:

- **Preparing for Ambassador Outreach** consists of writing a coordination plan, preparing the Person-to-Person and Spokesperson Ambassadors' tools and Handbooks, and recruiting and training Ambassadors.
- **Implementing Ambassador Outreach** includes working with Ambassadors and supporting their activities.
- **Evaluating Ambassador Outreach** involves documenting activities and progress toward reaching CDSMP or ASMP enrollment goals.

## STEP 1: PREPARING FOR AMBASSADOR OUTREACH

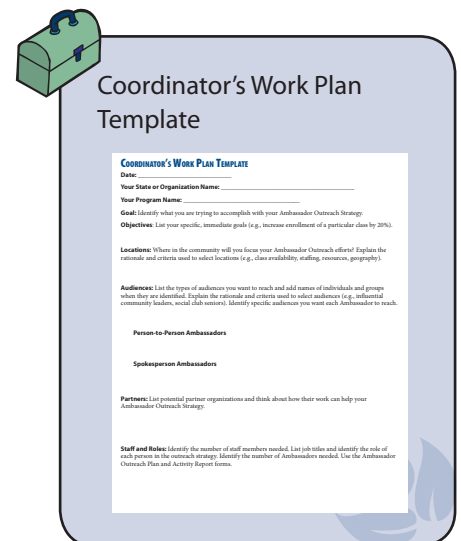
### Developing the Coordinator's Work Plan

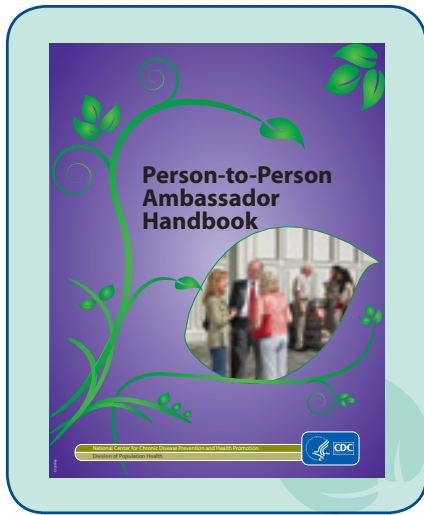
Effective marketing begins with an effective plan. Developing a plan is the key task in Step 1. Use the Coordinator's Work Plan template in the Coordinator's Tools to guide you through the planning process. For each step in the process, from planning activities through outreach and evaluation, identify the resources needed and staff members responsible for the tasks and write a timeline for completion.

Plan for challenges to occur and think of strategies to address them. Make a note of ways that your approach may differ from this guide so you can customize the training of staff members and Ambassadors.

### Preparing the Ambassador Tools

This activity involves preparing the tools that will be used by either the Person-to-Person Ambassadors or the Spokesperson Ambassadors. The tools include guidance and forms, most of which are print-ready so that



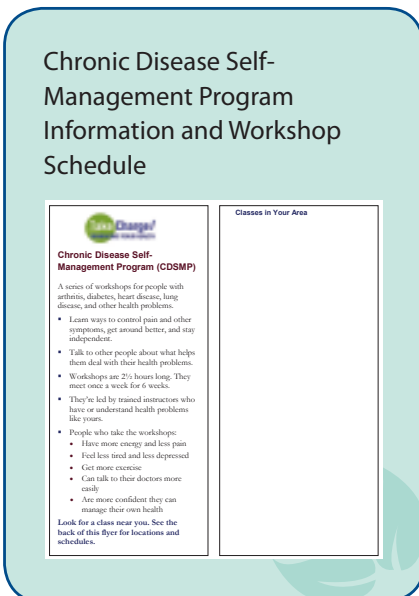


they can be copied or customized to your unique needs. For some, you will want to make multiple copies for each Ambassador to use. Others, like the Talking Points Card, may require using cardstock and laminating them so that an Ambassador can use them in the field.

**See Ambassador Tools, page 39.**

The Ambassador tools include the following:

- **Ambassador Handbooks.** The stand-alone Handbooks provide day-to-day guidance for both Person-to-Person Ambassadors and Spokesperson Ambassadors to use as they plan, prepare, conduct, and track outreach activities. The Handbooks will direct Ambassadors to the tools they will use to market workshops. As Coordinator, you may want to provide the tools as part of Ambassador training. You can familiarize trainees with the outreach steps outlined in each Ambassador Handbook and guide them to use the tools that support each step.
- **Person-to-Person and Spokesperson Ambassador Outreach Plan.** Provide multiple copies or send by e-mail so the Ambassador can make plans each month.
- **Person-to-Person and Spokesperson Ambassador Activity Report Forms.** Customize the forms by providing the Coordinator’s contact information. Provide multiple copies or send by e-mail so the Ambassador can turn in the report each month.
- **Talking Points Card.** Print double-sided copies (front and back) on thick paper such as cardstock and laminate them for repeated use. Provide one or more to each Ambassador.
- **CDSMP (or ASMP) workshop information and schedule.** Either use your own intervention-specific marketing materials or customize the CDSMP materials to include the name of your program (if it is not CDSMP) and information about the current workshops (e.g., location, schedule). Customize the “classes in your area” section on side 2 by entering local class information into the fields prompted by the fillable PDF. You can reproduce these from a desktop printer on heavy weight paper, up to 80 lb text, or take the electronic file to a local printer to be printed on 65 lb cover stock. The file has room for information about three classes per sheet; trim them manually so each schedule is the same size. For best results, take the electronic file to a local printer to be reproduced and trimmed. Provide each Ambassador with multiple copies to distribute. Make sure that the workshop information is updated regularly.
- **CDSMP PowerPoint slide presentation for Spokesperson Ambassadors.** If your Spokesperson Ambassadors have opportunities to use PowerPoint presentations, customize those files with information about your program (e.g., name, location, contact information).



## Recruiting Ambassadors

Once your work plan is written, you should identify the audiences you want to reach with Ambassador Outreach. Will the Ambassadors market to individuals, to groups, or to both? How do you identify people in the community who would be effective Person-to-Person Ambassadors? How do you identify people who would be good Spokesperson Ambassadors? They should not be just any member of the target audience or a CDSMP leader, for example. An effective Ambassador is a person who is a “walking billboard,” eager to spread the word to both friends and colleagues and to generate a buzz in the community about upcoming CDSMP or ASMP workshops.

### *Desired Ambassador Characteristics*

Characteristics that you may want to look for include being

- Experienced—has successfully completed a CDSMP or ASMP workshop.
- Connected—lives or works in the community and is respected by a wide circle of peers.
- Enthusiastic—is a “believer” and wants to spread the word about the CDSMP.
- Wired to talk—is willing to create a buzz by talking to a broad range of people, either one-on-one or in groups.

 **See the job descriptions for Person-to-Person and Spokesperson Ambassadors on pages 21–24.** 

## Recruiting the Right Ambassadors

Are you looking for a Person-to-Person or a Spokesperson Ambassador? Your Coordinator’s Work Plan can help you decide how you want to market self-management education workshops in your area. Review your objectives and determine if you need to recruit Ambassadors who will market to individuals (Person-to-Person) or Ambassadors who will market to groups (Spokesperson) or both. Consider the following characteristics as you recruit your Ambassadors:

### *Person-to-Person Ambassador Characteristics*

- Not comfortable speaking in front of groups of people.
- Very comfortable striking up conversations with people they may or may not know.
- Very comfortable talking with one or more individuals about the CDSMP and their own experiences.
- Very comfortable talking with individuals face-to-face and not just on the phone.



#### **LESSONS FROM THE FIELD**

An excellent CDSMP Ambassador, I believe, is anyone who would extol the benefits regardless of whether or not they are paid. In other words, they need to truly believe in the CDSMP.



#### **LESSONS FROM THE FIELD**

The Ambassadors have very outgoing personalities and are not afraid to strike up a conversation with a stranger.



#### **LESSONS FROM THE FIELD**

We gave each Ambassador a keychain with the talking points laminated into a clear plastic holder.

We provided a jump drive of the PowerPoint presentation to all of our Spokesperson Ambassadors.

### ***Spokesperson Ambassador Characteristics***

- Comfortable or willing to learn to speak in front of a group of people.
- Comfortable or willing to learn how to use a laptop computer.
- Comfortable or willing to learn how to speak using a set of slides as prompts.
- Comfortable or willing to learn how to use a microphone.
- Comfortable talking with individuals and groups about the CDSMP and their own experiences.



#### **LESSONS FROM THE FIELD**

Training took more than 2 hours. Helping Ambassadors to complete their first plan involved phone calls and sometimes another meeting.

### **Training Ambassadors**

You will need to train your Ambassadors to do their outreach activities. If you have recruited several Ambassadors, you may want to schedule a group training session. If you have only one or two Ambassadors, it may be easier to do individual training sessions. You will need to consider the needs of the Person-to-Person and Spokesperson Ambassadors and tailor your training accordingly. The following learning objectives are essential for successful outreach training.

By the end of Ambassador training, each trainee will be able to

- Identify how to use the Person-to-Person or Spokesperson Ambassador Handbook.
- Describe and understand the three steps to Ambassador Outreach.
- Present the CDSMP (or ASMP) pitch.
- For Spokesperson Ambassadors only, demonstrate how to give the PowerPoint presentation.
- Demonstrate the use of the Ambassador Outreach Activity Report form.
- Describe how to check in with the Coordinator.



See Ambassador Training Curriculum, page 27.



## **STEP 2: IMPLEMENTING AMBASSADOR OUTREACH**

Your goal as Coordinator is to set up a dynamic, grassroots marketing network of Ambassadors that increases participation in self-management education (CDSMP or ASMP) workshops. Your Coordinator's Work Plan outlines what you want to do; defines your populations, audiences, and partners; and establishes staff responsibilities, a budget, and a work plan. Here are some recommendations for managing these activities after you have recruited and trained your Ambassadors.

## Managing Ambassador Outreach

Managing the Ambassador Outreach Strategy involves two key tasks: staying in touch with Ambassadors and tracking their outreach activities.

### *Staying in Touch and Providing Guidance*

Your Ambassadors are the center of your outreach strategy and, if they are working well, they will be out in the community. Connecting with Ambassadors on the move may be a challenge. You will need to maintain regular contact so you can support and encourage them. Having an ongoing discussion about individual Ambassador Outreach Plans and Activity Reports may be the key to nurturing a dynamic relationship between you as Coordinator and your Ambassadors.

An understanding of expectations and progress will make the relationship clear and easy to manage. Use the sample Ambassador job descriptions to clarify expectations. (See the information on page 10 about monitoring and tracking Ambassador activity.) When you receive Ambassadors' monthly Activity Reports, be sure to contact them to discuss challenges or things they may have learned. Keep a database of your Ambassadors so you can check in with them periodically. The Ambassador Tracking Spreadsheet will allow you to monitor Ambassadors and their monthly Activity Reports.

### *Retaining Ambassadors*

Retaining an active network of Ambassadors ready to market your next CDSMP workshop may be challenging, especially if they are volunteers. Compensation for work well done is a great incentive. Staying in touch with your Ambassadors may help you retain them, as will recognizing them for their efforts and successes.

#### **Recognizing Ambassadors**

Ambassadors are important members of your team and should be recognized for their efforts. Compensation is important but may not be feasible or necessary. Look for other ways to recognize Ambassadors. For example,

- Give Ambassadors awards like plaques or certificates of achievement.
- Nominate an Ambassador for a community award.
- Name an "Ambassador of the Month."
- Celebrate success frequently.
- Send personal greetings and messages of gratitude, both private and public.
- Promote an Ambassador to a training or leadership role.



#### **LESSONS FROM THE FIELD**

Monthly meetings to review plans and to discuss next steps lasted about an hour or longer. Follow-up phone calls to Ambassadors for support and technical assistance were generally about 15 minutes each.



#### **LESSONS FROM THE FIELD**

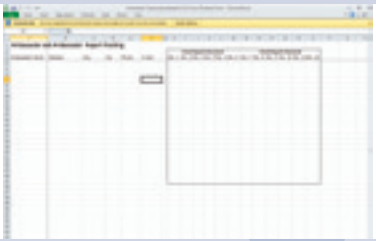
Our Ambassadors formed a supporting team among themselves and helped each other as they learned to market the workshops.

## Monitoring and Tracking Ambassador Activity

As part of training, each Ambassador will practice and understand how to fill out the Ambassador Outreach Plans and Activity Reports. You may ask your Ambassador to mail or e-mail the report to you, or you may decide to call each month to get the report information and help the Ambassador plan the next month's outreach activities. Record the information on the Ambassador Tracking Spreadsheet.



Ambassador and Ambassador Report Tracking Spreadsheet



See the Ambassador Outreach Plan and Activity Report templates on pages 41–44.



See the Ambassador Tracking Spreadsheet template, pages 55–56.



## STEP 3: EVALUATING AMBASSADOR OUTREACH

The goal of the Ambassador Outreach Strategy is to increase enrollment and participation in self-management education workshops. How will you know if you have accomplished this goal? Will you be able to collect data to determine the effect of using Ambassadors to market workshops? One soft evaluation measure would be recording workshop registration data over time to determine if more people or fewer people are registering for classes. It would also be useful to find out how participants heard about a workshop and match that with Ambassador activity data. This type of evaluation may give you an idea of the effectiveness of your Ambassador Outreach Strategy.

To help you track and evaluate your efforts, ask workshop participants to complete the “How Did You Hear About Us?” Registration Questionnaire. You may use this form when people register or incorporate the question into your program registration form. Record this information on the “How Did You Hear About Us?” Data Entry Spreadsheet Template to determine if your word-of-mouth recruitment is increasing workshop registrations.

For instructions on how to enter data, check the tips for completing the spreadsheet on the Instructions tab of the spreadsheet file.

**Note:** You can eliminate some columns in the spreadsheet if you are not tracking referrals or recommendations from health care providers.



“How Did You Hear About Us?” Data Entry Spreadsheet



## Summarize Your Efforts

Periodically, use the Ambassador Outreach Evaluation Summary Report template to reflect on and evaluate your efforts. Document both successes and challenges and note factors that affected the work or the timing of the work and outcomes. What have you been able to accomplish and why? What have you learned from the process and the players involved? What would you do differently in the future to make your Ambassador Outreach efforts more successful?



### LESSONS FROM THE FIELD

As our Ambassadors gained more experience, they didn't need to rely on the Coordinator as much.

 **See the Ambassador Outreach Evaluation Summary Report template, pages 61–65.** 

## CONCLUSION

As you can see, there are three basic steps to marketing self-management education through Ambassador Outreach. For Step 1, you will need to prepare your strategy by developing your work plan and recruiting and training your Person-to-Person and Spokesperson Ambassadors. During Step 2, you will be investing time in maintaining contact with your Ambassadors and tracking their activities. Finally, in Step 3, you will want to step back periodically and evaluate how well your Ambassador Outreach Strategy is working. Are your Ambassador Outreach activities resulting in greater enrollment in your self-management education workshops? How can you improve your outreach strategy?

Audience research has shown that people find friends or other people they know who have benefitted from a specific intervention to be both believable and motivating. Consequently, an Ambassador Outreach Strategy can be an important part of a multidimensional marketing strategy for your self-management education workshops. Your Ambassadors are one of your most valuable assets—use them well!



# **COORDINATOR'S TOOLS:** **PREPARING FOR AMBASSADOR OUTREACH**

## **PLANNING TOOLS**

**Coordinator's Work Plan Guidance**

**Coordinator's Work Plan Template**

These Planning Tools are available online at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach) and can be downloaded and customized for each activity.



# COORDINATOR'S WORK PLAN GUIDANCE

## Goal

What do you want to accomplish by planning and conducting this Ambassador Outreach Strategy?

## Objectives

What are you trying to achieve by using Ambassador Outreach to promote self-management education workshops? You may have specific, immediate objectives, such as increasing the enrollment of a particular workshop by 20%. Does your program need to meet specific measures that you want to include in your objectives? Be specific about which intervention(s) your Ambassadors will promote.

During each step, specify whether a Person-to-Person or Spokesperson Ambassador will be involved in the activity.

## Locations

After you have chosen the interventions you are going to promote, look at the places where the workshops are being offered. Depending on how many staff members and Ambassadors you have, you may not be able to market to all locations when you launch your Ambassador Outreach Strategy.

To start, focus on workshop locations where classes are not being filled. You will also want to consider how accessible your locations are for the chosen audience, including the availability of services such as public transportation and parking. As you and your team build experience, add more locations to your list.

## Audiences

An important step in the planning process is to identify the individuals and groups you want to reach with your marketing efforts. The Ambassadors' existing relationships with people in the community will determine which individuals and groups you will reach through this strategy. In addition, you, as Coordinator, may want to identify groups that are likely to have potential workshop participants (e.g., women's church groups, veterans, social organizations, garden clubs).

## Partners

If you are working with other organizations, list those you expect to be involved and define their roles in your outreach strategy plan.

## Staff and Roles

As you prepare for the outreach process, you will need to select a team of people who will be responsible for promoting self-management education interventions in your state or community. Team members may include employees from the state health department, staff or volunteers from partner organizations, and Ambassadors.



### Tip

Sample Goal: "Establish a dynamic, grassroots marketing network of Ambassadors that increases participation in self-management education (CDSMP) workshops."



### Tip

Clearly defining the "what," "where," and "who" is key to planning your outreach initiative.

**TIP**

Identify potential obstacles and challenges to implementing your outreach initiative.

Examples include competing programs, lack of staff time and resources, unresponsive partners, or geographic and logistical challenges.

Think about how you will recruit your Ambassadors. Do you need them to market to individuals or groups or both? How will they be trained, who will train them, and what will their duties be? Define roles for those involved in managing the overall strategy; recruiting, training, and supporting Ambassadors; and managing the evaluation process.

**Coordinator's Work Plan**

The Coordinator's Work Plan template includes a table that allows you to outline key activities, timelines, and team members—including Ambassadors—responsible for each task.

**Budget**

Document your funding sources and allotted budget, as well as the number of staff members, including Ambassadors, you expect to need or have available to work on your outreach strategy. Estimate major expenses, such as staffing, printing, training, travel (for Ambassadors conducting outreach visits), and Ambassador incentives (if you plan to offer them).

# COORDINATOR'S WORK PLAN TEMPLATE

**Date:** \_\_\_\_\_

**Your State or Organization Name:** \_\_\_\_\_

**Your Program Name:** \_\_\_\_\_

**Goal:** Identify what you are trying to accomplish with your Ambassador Outreach Strategy.

**Objectives:** List your specific, immediate goals (e.g., increase enrollment of a particular class by 20%).

**Locations:** Where in the community will you focus your Ambassador Outreach efforts? Explain the rationale and criteria used to select locations (e.g., class availability, staffing, resources, geography).

**Audiences:** List the types of audiences you want to reach and add names of individuals and groups when they are identified. Explain the rationale and criteria used to select audiences (e.g., influential community leaders, social club seniors). Identify specific audiences you want each Ambassador to reach.

## Person-to-Person Ambassadors

## Spokesperson Ambassadors

**Partners:** List potential partner organizations and think about how their work can help your Ambassador Outreach Strategy.

**Staff and Roles:** Identify the number of staff members needed. List job titles and identify the role of each person in the outreach strategy. Identify the number of Ambassadors needed. Use the Ambassador Outreach Plan and Activity Report forms.

## Tasks and Timeline

List the objectives from your work plan and the activities needed to achieve them. Who will be responsible for each activity and when will it be completed? Specify whether the outreach activities are for Person-to-Person (P) or Spokesperson (S) Ambassadors.

Objective	Task/Activity	Person Responsible	Completion Date

**Ambassador Outreach Budget (Use your own format for detailed budgeting.)**

**Projected Budget: \$**

**Estimated major expenses:**

**Staffing: \$**

**Printing: \$**

**Travel: \$**

**Partner Incentives: \$**

**Ambassador Incentives: \$**

**Total: \$**





## **COORDINATOR'S TOOLS:** **PREPARING FOR AMBASSADOR OUTREACH**

### **RECRUITING TOOLS**

**Person-to-Person Ambassador Job Description**

**Spokesperson Ambassador Job Description**

These Recruiting Tools are available online at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach) and can be downloaded and customized for each activity.



# PERSON-TO-PERSON AMBASSADOR JOB DESCRIPTION

## Role

Person-to-Person Ambassadors will serve as the community voice for self-management education workshops, specifically the CDSMP. As a community voice, the Ambassador will encourage other people to participate in a CDSMP workshop. This goal is accomplished through informal conversations with people like themselves.

## Responsibilities

- Attend a training session (2–3 hours) to become an Ambassador.
- Develop a personalized Ambassador Outreach Plan and update it monthly.
- Prepare and practice a personalized pitch that highlights the benefits received from attending a CDSMP workshop.
- Promote the CDSMP in casual conversation with family, friends, and acquaintances and also to people in the community who can recommend the workshop to their constituents.
- Follow up with the people you talk with to further encourage them to attend a CDSMP workshop.
- Communicate regularly with the Ambassador Outreach Coordinator.
- Use the Ambassador Outreach Activity Report form to submit a monthly report.

## Qualifications

- Experienced—has successfully completed a CDSMP workshop.
- Connected—lives or works in the community and is respected by a wide circle of peers.
- Enthusiastic—is a “believer” and wants to spread the word about the CDSMP or the ASMP.
- Wired to talk—is willing to create a buzz by talking to a broad range of people.
- Comfortable talking about his or her experiences with others.
- Oriented to community service or to giving back to the community.

## Training Required

Ambassadors will be trained either individually or in a small group. Training will include help identifying potential audiences, preparing a CDSMP pitch and practicing how to deliver it, and understanding expectations for follow-up and reporting. Ongoing consultation will be available, and periodic training or refresher sessions may be available.

## Time Required

- Attend an initial training session lasting 2–3 hours.
- Each informal outreach visit is likely to take 3–15 minutes; total time per month depends on the number of outreach visits made.
- Follow-up and reporting require 60 minutes per month.

## Benefits

- Satisfaction of promoting a valuable community service to friends, family, and community.
- Opportunity to contribute to a CDSMP program.
- Opportunity to improve the quality of life and well-being of community members with ongoing health conditions.

# Spokesperson Ambassador Job Description

## Role

Spokesperson Ambassadors will serve as the community voice for self-management education workshops, specifically the CDSMP. As a community voice, each Ambassador will encourage enrollment in a CDSMP workshop through presentations to groups of people selected as potential participants.

## Responsibilities

- Attend an initial training session (2–3 hours) to become an Ambassador.
- Develop a personalized Ambassador Outreach Plan and update it monthly.
- Prepare and practice a personalized pitch that highlights the benefits received from attending a CDSMP workshop.
- Set up appointments with select community groups to promote CDSMP workshops.
- Follow up with the people you talk with to further encourage them to attend a CDSMP workshop.
- Be available to speak to groups about the CDSMP upon request.
- Communicate regularly with the Ambassador Outreach Coordinator.
- Use the Ambassador Outreach Activity Report form to submit a monthly report.

## Qualifications

- Experienced—has successfully completed a CDSMP workshop.
- Connected—lives or works in the community and is respected by a wide circle of peers.
- Enthusiastic—is a “believer” and wants to spread the word about the CDSMP or the ASMP.
- Wired to talk—is willing to create a buzz by talking to a broad range of people.
- Comfortable speaking to groups of people.
- Oriented to community service or to giving back to the community.

## Training Required

Ambassadors will be trained either individually or in a small group. Training will include help identifying potential outreach audiences, preparing a CDSMP pitch and practicing how to deliver it, and understanding expectations for follow-up and reporting. Ongoing consultation will be available, and periodic training or refresher sessions may be available.

## Time Requirement

- Attend an initial training session (2–3 hours).
- Each formal presentation is likely to take 10–15 minutes, plus travel time. Monthly time commitment will depend on the number of presentations made per month.
- Follow-up and reporting will require 60 minutes per month.

## Benefits

- Satisfaction of promoting a valuable community service to friends, family, and community.
- Opportunity to contribute to a CDSMP program.
- Opportunity to improve the quality of life and well-being of community members with ongoing health conditions.

# **COORDINATOR'S TOOLS:**

## **PREPARING FOR AMBASSADOR OUTREACH**

### **TRAINING TOOLS**

#### **Ambassador Training Curriculum**

#### **Sample Flip Chart Pages**

- Ambassador Training Agenda
- Three Steps to Ambassador Outreach
- The Pitch

#### **Ambassador Training Agenda**

#### **Ambassador Training Certificate Template**

These Training Tools are available online at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach) and can be downloaded and customized for each activity.





# AMBASSADOR TRAINING CURRICULUM

## Learning Objectives

By the end of training, the Person-to-Person or Spokesperson Ambassador will be able to

- Demonstrate how to use the Person-to-Person or Spokesperson Ambassador Handbook.
- Demonstrate how to write an Ambassador Outreach Plan.
- Describe and understand the three steps in Ambassador Outreach.
- Describe and understand the three parts to every marketing pitch.
- Demonstrate the CDSMP pitch (and PowerPoint presentation for Spokesperson Ambassadors).
- Describe how to fill out the Ambassador Outreach Activity Report.
- Describe how to get in touch with the Coordinator.

## Training Materials Needed

- A space large enough for trainees to pair up and separate from the group to practice delivering the pitch.
- Large tables on which to spread out the training materials.
- Attendance roster.
- Flip chart and pens.
- Hard-copy, customized Ambassador Handbooks, one for each Ambassador trainee.
- Hard copies of the Ambassador tools to be inserted in each handbook:
  - » Person-to-Person or Spokesperson Ambassador Job Description.
  - » Ambassador Outreach Plan form.
  - » Ambassador Outreach Activity Report form.
  - » Talking Points Card.
  - » PowerPoint presentation for Spokesperson Ambassadors.
- Previously prepared flip chart pages (see samples, pages 34–36):
  - » The Ambassador Training Agenda, including time allotted for each activity.
  - » Three Steps to Ambassador Outreach.
  - » The Pitch.
- Paper and pens for each trainee to take notes.
- Name tags.
- Ambassador Training Certificates (See template, page 38).



### TIP

You may choose to train Person-to-Person and Spokesperson Ambassadors together or separately. This training curriculum will work with either training format. Review the agenda and guidance carefully and design your training with an individual focus for a Person-to-Person Ambassador trainee and a group focus for a Spokesperson Ambassador trainee.

## How to Train Adult Learners

Adults need to

- Be actively involved.
- Get lots of positive feedback.
- Apply knowledge and skills to their communities.
- Build on their own experience.
- Take frequent breaks.

## TRAINER'S GUIDE

### Activity 1: Introductions (5 minutes)

#### Materials

- Flip chart.

#### Method

- Welcome Ambassador trainees and introduce trainers.
- Write the following question on the flip chart: “Why do you want to be an Ambassador?” Ask each trainee to answer the question.

### Activity 2: Overview of the Agenda (5 minutes)

#### Materials

- Ambassador Training Agenda Flip Chart.

#### Method

- Review the agenda on the flip chart. Ask if anyone has any questions or concerns about the agenda or the time allotted.

### Activity 3: The Role of the Ambassador (10 minutes)

#### Materials

- Person-to-Person or Spokesperson Ambassador Job Description handouts.

#### Method

- If you are training both Person-to-Person and Spokesperson Ambassadors, explain that the roles are similar but the audiences are different. Person-to-Person Ambassadors work with individuals, while Spokesperson Ambassadors work with groups.
- Ask trainees to describe what the Person-to-Person or Spokesperson Ambassador will do.

- Use the Person-to-Person and Spokesperson Ambassador Job Descriptions as references. List the primary activities and responsibilities for each position.
- Allow a minute or two to clarify any questions or concerns.

## **Activity 4: Ambassador Handbook Walk-Through (30 minutes)**

### **Materials**

- Person-to-Person and Spokesperson Ambassador Handbooks.
- Person-to-Person and Spokesperson tools and forms.
  - » Person-to-Person or Spokesperson Ambassador Outreach Plan forms.
  - » Person-to-Person or Spokesperson Ambassador Outreach Activity Report forms.
  - » Talking Points Card.
  - » CDSMP information and schedule.
  - » PowerPoint Presentation (for Spokesperson Ambassadors).

### **Method**

- Give either a Person-to-Person or Spokesperson Ambassador Handbook to each trainee.
- Optional: Hand out the Ambassador tools and tell the trainees to insert them in the appropriate place in their Handbooks as you go through the sections.
- Review the “How to Use This Handbook” section.
- Discuss the three steps to Ambassador Outreach and the three parts to every marketing pitch.
- Show trainees the Three Steps to Ambassador Outreach Flip Chart (page 35). Show them how to find the Steps to Ambassador Outreach activity in each Handbook.
- Show trainees The Pitch Flip Chart (page 36) and explain the three parts of a successful marketing pitch. Show them the Talking Points Card.
- Show trainees the tools, tips, and any other resources you may have inserted in the Handbooks before training.

## **Activity 5: Overview of the Steps to Ambassador Outreach (10 minutes)**

### **Materials**

- Three Steps to Ambassador Outreach Flip Chart.

### **Method**

- Display the Three Steps to Ambassador Outreach Flip Chart.
- Read the three steps and explain that each step will be explained in detail and then followed by a practice session.

### **Break**

## **Activity 6: Review Ambassador Outreach Step 1: Preparing to Be an Ambassador (50 minutes)**

### **Make a Plan (20 minutes)**

#### **Trainer's Key Point**

- Being a great Ambassador starts with a good plan.

### **Materials**

- Person-to-Person or Spokesperson Ambassador Outreach Plan forms.

### **Method**

- Discuss the parts of the Ambassador Outreach Plan.
  - » Ask the trainees, “Why do you think you will need a plan to talk with your friends or family or if you are speaking to a group of people?”
  - » Use trainees’ answers to talk about how planning allows you to figure out how to fit Ambassador work into your daily life. Are you going to the library or church this week? If you know where you might be going, you can jot down your ideas about people to talk with there. That way, you can plan to have your Talking Points Card or pamphlets about local workshops with you. Afterward, you can go back and see if you were able to do what you planned and make adjustments for the next opportunity.

### **Prepare and Practice Your Pitch (30 minutes)**

#### **Trainer's Key Points**

- The basic message is essential and there are three parts to every pitch.
- Prepare your CDSMP pitch so you are ready for any opportunity to market a workshop.

## Materials

- Person-to-Person and Spokesperson Ambassador Handbooks: the “Learning the Basic Message or Pitch” section.
- Talking Points Cards.
- PowerPoint presentation (for Spokesperson Ambassadors).

## Method

- Discuss the “Learning the Basic Message or Pitch” section of the Handbook. It explains the Talking Points Card.
- Learn the basic message and its three parts.
- Use the Talking Points Card to remind yourself of the three message points.

## Practice

- Have Person-to-Person Ambassadors practice with one other person. Share positive and constructive feedback.
- Have Spokesperson Ambassadors practice the pitch and the PowerPoint presentation in front of the group.

## Break

## Activity 7: Review Ambassador Outreach Step 2: Marketing the CDSMP Workshops (40 minutes)

### Connect with People (20 minutes)

#### Trainer’s Key Point

- Make the most of the time you have to talk with people.

## Materials

- Person-to-Person and Spokesperson Handbooks: How to Make the Most of Your Time with People.

## Method

- Discuss the “How to Make the Most of Your Time with People” section of the Handbook.
- Review the keys to making the most of your time talking with people.
- Review how to tailor your pitch to individuals and influential community members. For Spokesperson Ambassadors, review the audience-specific information in the Handbook.

## Practice

- Have trainees use role-playing to learn how to be active listeners. Have one person talk and then ask listeners to repeat back what they have heard. Explain how to use what you hear to personalize your message (pitch) to individuals and their unique needs.
- Ask trainees to volunteer their ideas about the different types of audiences they might be talking to. For example, ask “How would you change your pitch or presentation if you were talking to veterans or if you were talking to church women?”

## Make Your Pitch Stick (20 minutes)

### Trainer’s Key Points

- Ambassadors must be familiar with the CDSMP information and the workshop schedule before they can use them.
- Ambassadors will need to follow up with people they talk with to make sure they sign up for workshops.

### Materials

- Flip chart.
- Person-to-Person and Spokesperson Ambassador Handbooks.
- Customized CDSMP information and workshop schedule.

### Method

- Ask trainees, “Can you think of ways to follow up with the people you have talked to?”
- List suggestions on the flip chart as they are mentioned (e.g., phone, U.S. mail, e-mail).

## Practice

- Brainstorm ideas for following up with the people that Ambassadors have talked with and discuss why this step is important.
- Share ideas about how to follow up and how this step can support program goals to raise attendance at workshops.

## Activity 8: Review Ambassador Outreach Step 3: Connecting with Your Coordinator (20 minutes)

### Trainer’s Key Point

- Ambassadors must use the Ambassador Outreach Activity Report to stay in touch with the Coordinator and track their progress.

### Materials

- Tools for Ambassadors: Ambassador Outreach Activity Report forms.

## Method

- Explain that using the Ambassador Outreach Activity Report form to track activity and report success is essential.
  - » By using the form to report outreach activities each month, Ambassadors can get support and help with planning for future outreach.
  - » The reports also help you identify what activities are working so they can be shared with other Ambassadors.

## Practice

- Review the Ambassador Outreach Activity Report to show trainees how to report their activities.
  - » Discuss the importance of understanding how outreach activities are progressing.
  - » Discuss how Ambassadors can keep in touch with the Coordinator to share successes and challenges.

## Activity 9: Review (10 minutes)

### Materials

- Flip chart.
- Three Steps to Ambassador Outreach Flip Chart (page 35).
- The Pitch Flip Chart (page 36).

### Method

- Ask trainees to name the three steps involved in Ambassador Outreach and check them off the flip chart display.
- Ask trainees to name the three parts of a marketing pitch.
- Ask for ideas and tips for success. Share and discuss. Ask for questions.
- If you have time, brainstorm ideas for building an Ambassador team, including ways that Ambassadors might help each other in the field. Ask for ideas about how the Coordinator can support Ambassadors.

## Activity 10: Ambassador Training Certificate Award Ceremony (5 minutes)

### Materials

- Ambassador Training Certificates (page 38).

### Method

- At the front of the room, present each new Ambassador with an Ambassador Training Certificate. If you are offering other incentives, such as badges, t-shirts, or caps, present these as well.

# SAMPLE FLIP CHART

## AMBASSADOR TRAINING AGENDA

<b>Time</b>	<b>Agenda Item</b>
5 minutes	Introductions
5 minutes	Overview of the Agenda
10 minutes	Roles of the Person-to-Person and Spokesperson Ambassador
30 minutes	Ambassador Handbook Walk-Through
10 minutes	Overview of the Steps to Ambassador Outreach
10 minutes	Break
50 minutes	Step 1: Preparing to Be an Ambassador
10 minutes	Break
40 minutes	Step 2: Marketing the CDSMP Workshops
20 minutes	Step 3: Connecting with Your Coordinator
10 minutes	Review
5 minutes	Ambassador Training Certificate Award Ceremony



# **SAMPLE FLIP CHART**

## **THREE STEPS TO AMBASSADOR OUTREACH**

### Step 1: Preparing to Be an Ambassador

- Make a plan.
- Prepare and practice your pitch.

### Step 2: Marketing the CDSMP Workshops

- Connect with people.
- Make your pitch stick.

### Step 3: Connecting with Your Coordinator

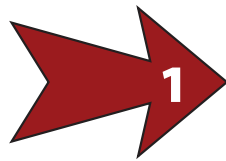
- Check in regularly.
- Celebrate your success.

## SAMPLE FLIP CHART

### THE PITCH

We both (or we all) have ongoing health problems. This workshop helped me, and I think it could help you too. Here is how you can sign up.

#### MAKE THE PITCH



**Opening:** Make the connection...



**Persuading:** Describe the benefits...



**Closing:** Demonstrate how to sign up...

# SAMPLE AGENDA

## AMBASSADOR TRAINING AGENDA

<b>Time</b>	<b>Agenda Item</b>
5 minutes	Introductions
5 minutes	Overview of the Agenda
10 minutes	Roles of the Person-to-Person and Spokesperson Ambassador
30 minutes	Ambassador Handbook Walk-Through
10 minutes	Overview of the Steps to Ambassador Outreach
10 minutes	Break
50 minutes	Step 1: Preparing to Be an Ambassador <ul style="list-style-type: none"><li>• Make a plan.</li><li>• Prepare and practice your pitch.</li></ul>
10 minutes	Break
40 minutes	Step 2: Marketing the CDSMP Workshops <ul style="list-style-type: none"><li>• Connect with people.</li><li>• Make your pitch stick.</li></ul>
20 minutes	Step 3: Connecting with Your Coordinator. <ul style="list-style-type: none"><li>• Check in regularly.</li><li>• Celebrate your success.</li></ul>
10 minutes	Review
5 minutes	Ambassador Training Certificate Award Ceremony

**Ambassador Training** ★  
**Certificate of Completion** ★

is presented to

Insert Student's Name Here

for

Insert [Type of Ambassador] Ambassador Training

Signature

Date

Insert Program Name Here



## **TOOLS FOR AMBASSADORS**

### **Person-to-Person Ambassador**

- Outreach Plan Template
- Outreach Activity Report Template

### **Spokesperson Ambassador**

- Outreach Plan Template
- Outreach Activity Report Template

### **Talking Points Card**

### **Self-Management Education Program Information and Workshop Schedule**

### **Chronic Disease Self-Management Education Program Information and Workshop Schedule**

### **Arthritis Self-Management Education Program Information and Workshop Schedule**

### **PowerPoint Presentation for Spokesperson Ambassadors**

These Tools for Ambassadors are available online at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach) and can be downloaded and customized for each activity.



# PERSON-TO-PERSON AMBASSADOR OUTREACH PLAN

Name \_\_\_\_\_

Month/Year \_\_\_\_\_

Who	What	When	Where	Notes
<i>Example:</i> Mary Smith	Neighbor	July 15, 9:00am	My house	Talk during coffee at my house.



# PERSON-TO-PERSON AMBASSADOR OUTREACH ACTIVITY REPORT

Ambassador Name \_\_\_\_\_

Month/Year \_\_\_\_\_

Instructions: Use this table to report your activities. Give it to your Coordinator at the end of each month.

Return report to \_\_\_\_\_

Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_

Date	Name of the person you talked to	Contact information	Follow-up: How will you make sure this person signs up for a workshop?
<i>Example:</i> July 15, 2013	Mary Smith	555-654-3211 msamith@aol.com	Pamphlet + call in 1 week.





# SPOKESPERSON AMBASSADOR OUTREACH PLAN

Name \_\_\_\_\_

Month/Year \_\_\_\_\_

Who	What	When	Where	Notes
<i>Example:</i> Garden Club Members	I am a guest speaker.	July 15, 9:00am	Mary's house	Talk with members of the Garden Club. No computer available so I won't use slides.



# SPOKESPERSON AMBASSADOR OUTREACH ACTIVITY REPORT

Ambassador Name \_\_\_\_\_

Month/Year \_\_\_\_\_

Instructions: Use this table to report your activities. Give it to your Coordinator at the end of each month.

Return report to \_\_\_\_\_

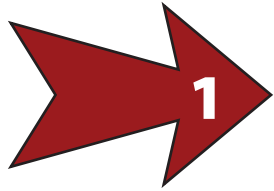
Fax \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_

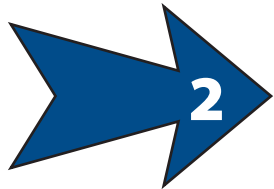
Date	Name of the group you talked to	Contact information	Follow-up: How will you make sure these people sign up for a workshop (e.g., all, e-mail, send a postcard)?
<i>Example:</i> July 15, 2013	Westfield Community Church women's group	555-654-3322 westfieldchurch@aol.com	Pamphlets and class schedule; send postcards in 1 week.



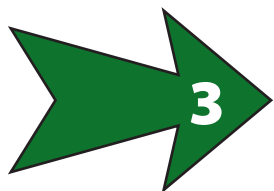
## MAKE THE PITCH



**Opening:** Make the connection...

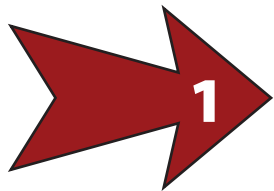


**Persuading:** Describe the benefits...

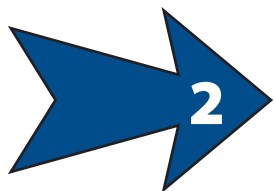


**Closing:** Demonstrate how to sign up...

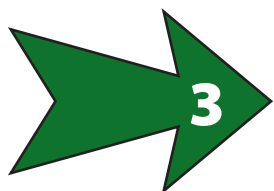
## MAKE THE PITCH



**Opening:** Make the connection...

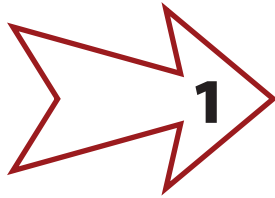


**Persuading:** Describe the benefits...



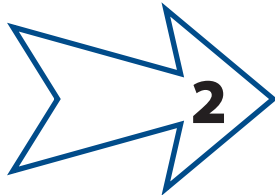
**Closing:** Demonstrate how to sign up...

## MAKE THE PITCH



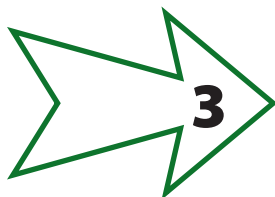
**Opening:** Make a connection...

"We both (or we all) have ongoing health problems. This workshop helped me and I think it could help you too."



**Persuading:** Describe the benefits...

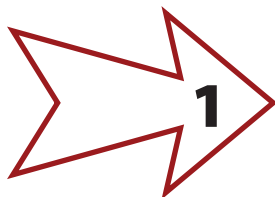
"I got a lot out of the workshops. I learned how to be more independent, how to exercise safely, and how to use other techniques for staying active and healthy."



**Closing:** Demonstrate how to sign up...

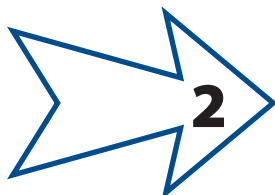
- "Here is how to sign up for a workshop. What can I do to help you sign up and participate?"
- Hand out the ASMP or CDSMP Information and Workshop Schedule.

## MAKE THE PITCH



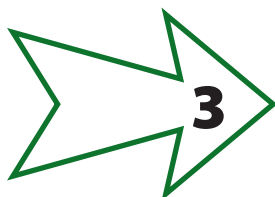
**Opening:** Make a connection...

"We both (or we all) have ongoing health problems. This workshop helped me and I think it could help you too."



**Persuading:** Describe the benefits...

"I got a lot out of the workshops. I learned how to be more independent, how to exercise safely, and how to use other techniques for staying active and healthy."



**Closing:** Demonstrate how to sign up...

- "Here is how to sign up for a workshop. What can I do to help you sign up and participate?"
- Hand out the ASMP or CDSMP Information and Workshop Schedule.

# SELF-MANAGEMENT EDUCATION PROGRAM INFORMATION AND WORKSHOP SCHEDULE

These customizable pieces offer a brief plain language description of the program on side 1, with space to add local class information on side 2. You can reproduce these from a desktop printer on a heavy weight paper (up to 80 lb text), or take the electronic file to a local printer to be printed on 65 lb cover stock. The file prints three class schedules per sheet; trim them manually so that each schedule is the same size.

For each intervention you are promoting, customize the “Classes in Your Area” section on side 2 by typing over the highlighted fields to enter the location, dates and times, and costs. Put the name of the location in bold type. Here is an example of how to fill out the cards on pages 48–49:

Fields	Example
Name of Location	<b>Tri-County YMCA</b>
Address	1234 Main St, Kansas City
(###) ###-####	(123) 555-2222
Day, dates of classes	Tuesdays, June 7–June 28
00:00–00:00 a.m./p.m.	10:00–11:00 a.m.
\$\$ per session/\$\$ for # sessions	\$2 per session



## **Chronic Disease Self-Management Program (CDSMP)**

A series of workshops for people with arthritis, diabetes, heart disease, lung disease, and other health problems.

- Learn ways to control pain and other symptoms, get around better, and stay independent.
- Talk to other people about what helps them deal with their health problems.
- Workshops are 2½ hours long. They meet once a week for 6 weeks.
- They're led by trained instructors who have or understand health problems like yours.
- People who take the workshops:
  - Have more energy and less pain
  - Feel less tired and less depressed
  - Get more exercise
  - Can talk to their doctors more easily
  - Are more confident they can manage their own health

**Look for a class near you. See the back of this flyer for locations and schedules.**

## Classes in Your Area

# ARTHRITIS SELF-MANAGEMENT PROGRAM INFORMATION AND WORKSHOP SCHEDULE



## Arthritis Self-Management Program (ASMP)

A series of workshops for people with arthritis. Your friends and family can take it, too.

- Learn ways to control pain, stay independent, and feel more in charge of your health.
- Talk to other people about what helps them deal with their arthritis.
- Workshops are 2–2½ hours long. They meet once a week for 6 weeks.
- They're led by trained instructors who have or understand arthritis.
- People who take the workshops:
  - Have less arthritis pain
  - Are less tired and less depressed
  - Get more exercise
  - Can talk to their doctors and families more easily
  - Feel more confident they can manage their own health

**Look for a class near you. See the back of this flyer for locations and schedules.**

## Classes in Your Area



# POWERPOINT PRESENTATION FOR SPOKESPERSON AMBASSADORS

If you have a computer and projector available, this PowerPoint presentation can be customized with information about workshops in your area.

**Learn to Live!**



Managing Ongoing Health Problems

Insert local program name and information here...




1

Did you wake up bright and ready to go?



2

or were you a bit droopy?



3


I know how you feel...



4

Let's Talk About:


- Chronic health problems
- The symptom cycle
- Self-management workshops
- How to sign up



5

**Chronic Health Problems**

- Diabetes
- Heart disease
- High blood pressure
- Arthritis



6



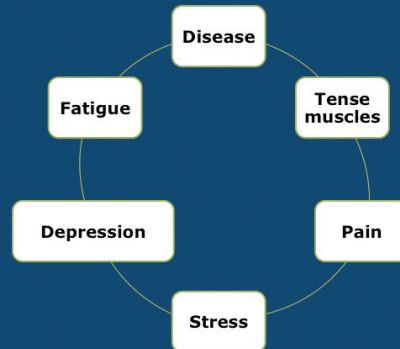
I wasn't prepared to live with ongoing health problems.



Where are the directions?

7

## The Symptom Cycle



8

## The Symptom Cycle



9

Insert name of your program here...

Developed by  
Stanford University

10

Research studies show these benefits of self-management:

- More confidence in managing your health problems.
- Improved ability to do household and social activities.
- Less fear and worry.
- Fewer symptoms like pain or shortness of breath.

11

At a workshop, you can

- Learn techniques that help you
  - Do exercises that work for you.
  - Move more easily.
  - Take charge of your own health.
  - Do the things you like to do.
  - Be more independent.

12

## Workshops

- Are small groups of people like yourself.
- Have experienced workshop leaders.
- Take 2½ hours a week for 6 weeks.
- Let you learn and practice problem-solving, goal-setting, and decision-making.
- Are a way to share progress and get support from friends.

13

## Take charge of your life!



14

## What would you like to do?



15

## Sign Up for a Workshop

- Where: **insert location.**
- When: **insert date and time.**
- How: **insert information**  
telling how to sign up,  
including contact information.



16

## **COORDINATOR'S TOOLS:** **IMPLEMENTING AMBASSADOR OUTREACH**

### **AMBASSADOR TRACKING SPREADSHEET TEMPLATE**

**Sheet 1: Ambassador and Ambassador Report Tracking Spreadsheet**

**Sheet 2: Ambassador Activity Spreadsheet**

These Implementing Ambassador Outreach Tools are available online at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach) and can be downloaded and customized for each activity.



# AMBASSADOR TRACKING SPREADSHEET TEMPLATE

## Sheet 1: Ambassador and Ambassador Report Tracking Spreadsheet

The screenshot shows a Microsoft Excel spreadsheet in Protected View. The title bar reads "Ambassador Tracking Spreadsheets 5-31-13.xlsx [Protected View] - Microsoft Excel". The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, and View. A yellow warning bar states: "Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing".

The spreadsheet grid shows the following structure:

- Row 1: **Ambassador and Ambassador Report Tracking**
- Row 2: (Blank)
- Row 3: Headers for Ambassador information: **Ambassador Name**, **Address**, **City**, **Zip**, **Phone**, **E-mail**.
- Row 3: Headers for monthly reports: **Mo. 1**, **Mo. 2**, **Mo. 3**, **Mo. 4**, **Mo. 5**, **Mo. 6**, **Mo. 7**, **Mo. 8**, **Mo. 9**, **Mo. 10**, **Mo. 11**, **Mo. 12**.
- Row 4: (Blank)
- Row 5: (Blank)
- Row 6: (Blank)
- Row 7: (Blank)
- Row 8: (Blank)
- Row 9: (Blank)
- Row 10: (Blank)
- Row 11: (Blank)
- Row 12: (Blank)
- Row 13: (Blank)
- Row 14: (Blank)
- Row 15: (Blank)
- Row 16: (Blank)
- Row 17: (Blank)
- Row 18: (Blank)
- Row 19: (Blank)
- Row 20: (Blank)
- Row 21: (Blank)
- Row 22: (Blank)
- Row 23: (Blank)
- Row 24: (Blank)
- Row 25: (Blank)
- Row 26: (Blank)
- Row 27: (Blank)
- Row 28: (Blank)
- Row 29: (Blank)
- Row 30: (Blank)
- Row 31: (Blank)
- Row 32: (Blank)
- Row 33: (Blank)
- Row 34: (Blank)
- Row 35: (Blank)
- Row 36: (Blank)
- Row 37: (Blank)
- Row 38: (Blank)
- Row 39: (Blank)
- Row 40: (Blank)
- Row 41: (Blank)

The bottom status bar shows "Ambassadors" and "Activity".

# AMBASSADOR TRACKING SPREADSHEET TEMPLATE

## Sheet 2: Ambassador Activity Spreadsheet

Ambassador Tracking Spreadsheets 5-31-13.xlsx [Protected View] - Microsoft Excel

Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>Person-to-Person Ambassadors</b>			<b>Spokesperson Ambassadors</b>									
2	Name:	Individuals Contacted		Name:	Groups Contacted								
3		Number			Number								
4	Month 1			Month 1									
5	Month 2			Month 2									
6	Month 3			Month 3									
7	Month 4			Month 4									
8	Month 5			Month 5									
9	Month 6			Month 6									
10	Month 7			Month 7									
11	Month 8			Month 8									
12	Month 9			Month 9									
13	Month 10			Month 10									
14	Month 11			Month 11									
15	Month 12			Month 12									
16	0	0		Total	0								
17													
18													
19													
20													
21	<b>Person-to-Person Ambassadors</b>			<b>Spokesperson Ambassadors</b>									
22	Name:	Individuals Contacted		Name:	Groups Contacted								
23		Number			Number								
24	Month 1			Month 1									
25	Month 2			Month 2									
26	Month 3			Month 3									
27	Month 4			Month 4									
28	Month 5			Month 5									
29	Month 6			Month 6									
30	Month 7			Month 7									
31	Month 8			Month 8									
32	Month 9			Month 9									
33	Month 10			Month 10									
34	Month 11			Month 11									
35	Month 12			Month 12									
36	0	0		Total	0								
37													
38	<b>Person-to-Person Ambassadors</b>			<b>Spokesperson Ambassadors</b>									
39	Name:	Individuals Contacted		Name:	Groups Contacted								

Ambassadors Activity



## **COORDINATOR'S TOOLS:** **EVALUATING AMBASSADOR OUTREACH**

**“How Did You Hear About Us?” Registration Questionnaire**

**“How Did You Hear About Us?” Data Entry Spreadsheet Template**

**Ambassador Outreach Evaluation Summary Report Template**

These Evaluating Ambassador Outreach Tools are available online at [www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach](http://www.cdc.gov/arthritis/interventions/marketing-support/ambassador-outreach) and can be downloaded and customized for each activity.





## How Did You Hear About Us?

How did you hear about this class? Check all that apply.

- A friend, family member, or coworker.
- Someone who took the class before.
- Someone who teaches this or other community classes.
- A doctor's office of any kind, like a medical practice, HMO, hospital, or community clinic.

**IF YOU CHECKED DOCTOR'S OFFICE,  
GO TO NEXT QUESTION**



- A community or church/synagogue leader.
- A brochure, flyer, poster, or other printed material **NOT** from a doctor's office.
- A story or ad on radio or TV, or in a newspaper.
- A Web site.
- Don't know or don't remember.
- Other source. **SPECIFY:** \_\_\_\_\_

Class Name \_\_\_\_\_

Start Date \_\_\_\_\_

Location \_\_\_\_\_

4a. What's the name of the doctor or clinic?

4b. Who in the doctor's office told you about the class?  
Check only one answer.

- Doctor.
- Other clinical staff, like a nurse or physician's assistant.
- Front desk or administrative staff.
- Someone in the waiting room.
- Other staff.
- No person—just a brochure, flyer, or poster.

LOGO  
HERE

# "How Did You Hear About Us?" DATA ENTRY SPREADSHEET TEMPLATE

## How Did You Hear? Data Entry Spreadsheet

Participant # or ID	Main Question: How did you hear about this class?										Response 4a Followup: Name of Practice			Targeted/ Not Targeted			Response 4b Followup: Who told you about the class?							
	1	2	3	4	5	6	7	8	9	10	10 Specify	Type name of practice from questionnaire, if provided.		T	NT	UNK	1	2	3	4	5	6		
	Friend, family, co-worker	Someone who took class	Someone who teaches class	Doctor's office	Community leader or spokesperson	Brochure, flyer, poster	Radio, TV, newspaper	Web site	Don't know/remember	Other source	Type answer from questionnaire, if provided	Type name of practice from questionnaire, if provided.	Targeted practice	Not a targeted practice	Unknown	Doctor	Other clinical staff	Front desk, admin staff	Someone in waiting room	Other staff	Brochure, flyer, poster			
1																								
2																								
3																								
4																								
5																								
6																								
7																								
8																								
9																								
10																								
TOTALS	1	2	3	4	5	6	7	8	9	10	ALL RESPONSES			T	NT	UNK	1	2	3	4	5	6		

See instructions tab for tips on filling out this spreadsheet and inserting formulas to calculate sums.

# AMBASSADOR OUTREACH EVALUATION SUMMARY REPORT TEMPLATE

Capture the experience, successes, and challenges of using Ambassador Outreach as a way to increase participation in local chronic disease self-management workshops. Review lessons learned and think about ways to strengthen this outreach strategy.

Your State and Program Name: \_\_\_\_\_

Reporting Period: \_\_\_\_\_

***Describe Your Outreach Strategy. Use your Coordinator's Work Plan to summarize the following:***

- What interventions and workshops did your program promote through Ambassador Outreach?
- How many locations or communities did you focus on?
- What were your criteria for selecting those locations or communities? (You can use the criteria you described in your Ambassador Outreach Plan.)
- What specific audiences (individuals, groups, or influential leaders) did you focus on?
- What partners did you involve in your efforts?
- How many Person-to-Person Ambassadors were involved and in what communities were they active? (Your Ambassador Tracking Spreadsheet will have this information.)

- How many Spokesperson Ambassadors were involved and in what communities were they active? (Your Ambassador Tracking Spreadsheet will have this information.)
- How many staff members were on your Ambassador Outreach coordination team? List them by title and the role(s) each played in your outreach initiative (e.g., coordinated the overall effort, trained staff, prepared materials).

Title and name of staff member	Role(s) in outreach initiative

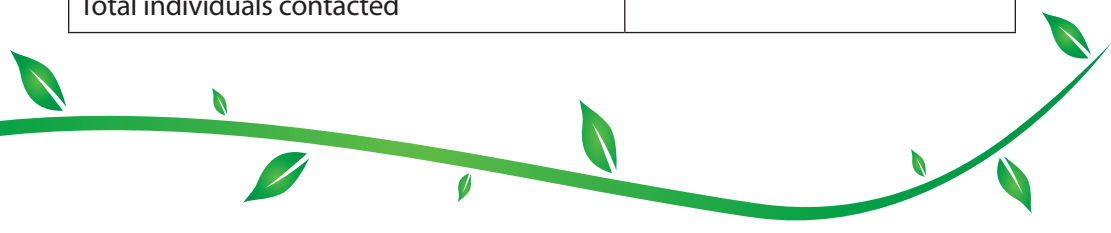
- What was your total budget? How much did you spend during this reporting period?
- What were your major areas of investment?

### Summarize Ambassador Activity

Using the information on the Ambassador Tracking Spreadsheet (page 56), summarize the following information:

Reporting Period (month/year—month/year) \_\_\_\_\_

Activity	Number
Active Person-to-Person Ambassadors	
Individuals contacted	
Active Spokesperson Ambassadors	
Group presentations	
Group attendance	
Total individuals contacted	



## Summarize Trends in Enrollment: Where Your Ambassadors Were Active

Use your Ambassador Tracking Spreadsheet and CDSMP workshop registration data to summarize the following information:

Trends in Enrollment							
Community Name and Number of Ambassadors per Community	Baseline (January–June)		Period 1 (July–December)		Period 2 (January–June)		
	Number of Workshops	Number of Participants	Number of Workshops	Number of Participants	Number of Workshops	Number of Participants	



## Summarize “How Did You Hear About Us?” Spreadsheet

Summarize the answers of workshop trainees who completed the Registration Questionnaire. If possible, gather and summarize the data from all areas of your state where the questionnaire was used. Then, summarize the data from the areas where your Ambassadors were active. Compare your results. Use this spreadsheet to record your information:

Data Sources	Total no. of participating areas where questionnaire was used	Total no. of participating areas where Ambassadors were active
Friend, family member, coworker		
Someone who attended a workshop		
Someone who teaches a workshop		
Doctor’s office or medical practice of any kind		
Church leader or other community leader		
Brochure, flyer, poster, or other print material		
Radio, TV, newspaper		
Web site		
Don’t know or don’t remember		
Other		
TOTAL		



## Conclusions and Lessons Learned

Specify Person-to-Person or Spokesperson Ambassador where applicable.

- Overall, how well did your Ambassador Outreach Strategy work? Describe how Ambassador Outreach was or was not effective in recruiting trainees to CDSMP workshops in locations where your Ambassadors were actively promoting them.
- What feedback have you received from your Ambassadors about this outreach strategy?
- Describe any observations you and your Ambassadors have made about factors that may encourage a person to act after Ambassador Outreach.
- What background, training, or personality characteristics do you think were especially helpful for Ambassadors who have participated in Ambassador Outreach?
- What are the main benefits and drawbacks of this Ambassador Outreach Strategy?
- What worked well and what would you do differently in future outreach initiatives?
- What advice would you give another program planning Ambassador Outreach? What do you wish someone had told you ahead of time?





# PERSON-TO-PERSON AMBASSADOR HANDBOOK



National Center for Chronic Disease Prevention and Health Promotion  
Division of Population Health





# PERSON-TO-PERSON AMBASSADOR HANDBOOK

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## INTRODUCTION



The goal of the Ambassador Outreach Strategy is to increase the number of people who participate in self-management education workshops. Audience research conducted by the Centers for Disease Control and Prevention has shown that word of mouth is an effective way to promote programs like the Chronic Disease Self-Management Program (CDSMP). In your area, the workshops may be called by another name, like “Living Well” or “Healthy Living.”

As a Person-to-Person Ambassador, you are the key to the success of this strategy. You are an Ambassador because you have experienced the benefits of participating in a CDSMP workshop. We need your special talents. You have experience, and you know how to connect with other people in your community. You were chosen because of your success and your enthusiasm for self-management education. You have what it takes to market the value of CDSMP workshops to your friends, neighbors, and leaders in your community and even to people you do not know.

## How to Use This Handbook

This handbook is set up in three steps, with tools and forms to help you “sell” participation in CDSMP workshops. The marketing term *pitch* refers to delivering this message. The first step is preparing to be a Person-to-Person Ambassador. You will receive training from your Ambassador Outreach Coordinator that will allow you to plan your outreach approach and practice your marketing pitch. The second step is delivering an effective pitch that convinces people like yourself to sign up for a CDSMP workshop. Finally, in the third step, you will be connecting with your Coordinator on a regular basis to keep him or her informed and to make sure you have the support you need. More details about each step are provided on the following pages.



As you move through each step, you will see icons for Tools  and Tips . They were customized by your Coordinator for your specific location and needs.

## STEP 1: PREPARING TO BE A PERSON-TO-PERSON AMBASSADOR

### Train and Make a Plan

The best preparation is practice. During training, you will have a chance to learn how to use this handbook, how to connect with people, and how to market CDSMP workshops. You will also learn how to make a plan for your outreach efforts. When you participated in a CDSMP workshop, you learned how to make a plan every week to take steps to improve your own health and well-being. That action plan was an important part of your success.



Your Coordinator will give you a Person-to-Person Ambassador Outreach Plan form.

PERSON-TO-PERSON AMBASSADOR OUTREACH PLAN				
Name: _____				
Month/Year: _____				
Who	What	When	Where	Notes
Mary Smith	Neighbor	July 25, 9:00am	My house	Talk during coffee at my house.

Your Coordinator will help you identify community members or people of influence in your community to speak with about self-management education. Once you have identified the “who,” then you will need to identify the “how.” Will you schedule a time to talk, or will you just talk about a CDSMP workshop casually the next time you see someone? Will you talk face-to-face or call people on the phone? You and your Coordinator need to stay in touch to review your plan and your activities regularly. That way, you can get support for what you want to do and you may be able to help other Ambassadors with your ideas.

### Learning the Basic Message or Pitch

As an Ambassador, you will be talking with individuals that you may or may not know. You could be at church or in a grocery store. You might be talking to your doctor or to a faith-based leader or other person in your community who can recommend the workshop. You might have 1 minute, 5 minutes, or longer to talk. Regardless of the circumstances or how you say it, make sure that you deliver this basic message:

**“We both [or we all] have ongoing health problems. This workshop helped me, and I think it could help you too. Here is how you can sign up.”**

This message has three parts: the opening, the persuading information, and the closing. If you use all three in every pitch, you will give people good reasons to sign up for a workshop.

Your Coordinator will give you a Talking Points Card that you can carry with you to remind yourself of the three parts of an effective message.

### **1 Part 1: Opening**

Make a connection with the people you are talking to by relating your own experience with a chronic condition or ongoing health problem. If you have time, you might talk about limitations you have experienced, such as pain, fatigue, or worry that kept you from doing the things you like to do.

*Example:* “Did you wake up this morning with a smile on your face and jump out of bed ready to roll? I know how it is—we have ongoing health problems. There is a workshop that helped me and I think it could help you too.”



## **Part 2: Persuading**

Describe the benefits of CDSMP workshops. This is the time to “sell” the workshop. Share one or more examples, depending on time, of how the CDSMP workshops helped you.

*Example:* “I got a lot out of this workshop. I learned how to be independent and how to exercise safely and use other techniques for staying active and healthy. Here are some of the benefits I have experienced from participating in a CDSMP workshop:

- “I learned new skills that help me to be more independent so I can do more of the things I like to do.”
- “Now I am in charge of my ongoing health problems instead of health problems being in charge of me.”
- “Everyone at the workshop shares experiences and supports each other.”
- “I learned techniques like exercising safely that have helped me move more easily.”
- “Now, I have more energy and I can breathe more easily when I climb stairs.”

Add other examples from your own experience.

## **Part 3: Closing**




Show people how to sign up for CDSMP workshops. Make sure everyone you talk with knows how to sign up. Give them a handout with information about upcoming workshops.

*Examples:* “Here is how to sign up for a workshop. What can I do to help you sign up and participate?” and “There’s a workshop close by that is coming up. Here is information about it. It’s a great way to meet other people like us, and it’s fun.”




Discuss the workshop information. Ask people if they have questions or if you can help them to participate. Give people the CDSMP Information and Workshop Schedule.

### Talking Points Card

**MAKE THE PITCH**

-  **1 Opening:** Make the connection...
-  **2 Persuading:** Describe the benefits...
-  **3 Closing:** Demonstrate how to sign up...

**MAKE THE PITCH**

-  **1 Opening:** Make a connection.  
“We both for we all have ongoing health problems. This workshop helped me and I think it could help you too!”
-  **2 Persuading:** Describe the benefits.  
“I got a lot out of the workshops. I learned how to be more independent, how to exercise safely, and how to use other techniques for staying active and healthy.”
-  **3 Closing:** Demonstrate how to sign up...
  - “Here is how to sign up for a workshop. What can I do to help you sign up and participate?”
  - Hand out the A&MSP or CDSMP Information and Workshop Schedule.



### TIP

Audience research has found that people are most interested in the benefits that help them maintain independence and do the things they like to do.

## STEP 2: MARKETING THE CDSMP WORKSHOPS

### How to Connect with People

Now that you have planned and practiced your pitch, you will be reaching out to the individuals and influential leaders that you identified. The CDSMP pitch in your handbook provides an outline for you to follow when preparing your pitch. The style of the conversation will vary depending on your audience and how much time you have to talk.

### Tailoring Your Pitch for an Individual

Every conversation is personal. To really connect with someone, you may need to think about the person you are talking to. Is this a friend or a family member, or is it someone you have just met at church, at a brunch, or in the grocery store?

You were chosen to be an Ambassador because you are a “people person.” Use your unique talents to tailor your pitch to each individual that you have the chance to talk with. You can use the guidelines and tools provided here to make each pitch a home run.

### Tailoring Your Pitch for an Influential Community Member

Sometimes you will be making your pitch to your doctor; minister, priest, or rabbi; hairdresser; or another influential person in your community who can recommend the CDSMP workshops to others. You will still include all three parts in every message because, no matter whom you talk with, audience research has shown that these points influence most people to get involved.

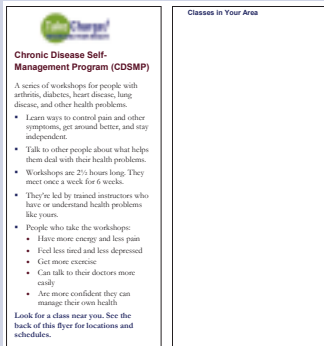
You may want to tailor the first part of your pitch to an influential person by acknowledging that he or she may encounter many people who have ongoing health problems. Part two of your pitch will focus on the benefits you have experienced from participating in a workshop. Part three can focus on providing the person with information on how to recommend a workshop and give people the tools to sign up.

### How to Make the Most of Your Time with People

- **Listen carefully** to determine what information will convince each person that a CDSMP workshop is worth attending.
- **Maximize your time with people** by focusing on the basic messages. Be prepared to answer questions, but only spend extra time on details if someone expresses interest and has the time.
- **Make it easy to recommend the workshops** by organizing packets of outreach materials in advance. That way, you can give the person all of the information he or she needs. Pay attention to questions and reactions and tailor your messages as needed. Emphasize the benefits that make the workshop worthwhile.



See the Chronic Disease Self-Management Program Information and Workshop Schedule.



- **Make it easy for people to participate** in a CDSMP workshop. Ask yourself, what information does this person need to know? What resources does he or she need? Use the CDSMP Information and Workshop Schedule or other materials that your Coordinator gave you. Handouts will help people sign up for workshops.

**Tip**

Incorporate lessons learned as you refine your approach for future outreach visits.

## Make Each Pitch a Home Run

Follow up with the people you talk with to reinforce the messages you shared during your conversation and to make it easy for them to sign up for a workshop. For best results, consider contacting people more often in the weeks right after you talked with them. Make sure you contact people early enough so that they have time to sign up for a workshop.

Staying in contact with people does not need to take a lot of time. Use the notes from your Ambassador Outreach Report to create a follow-up plan that works for you and the amount of time you have.

Here are some suggested ways to stay in contact with people:



### By Phone

Call the people you talked with soon after meeting them. Ask if they have had a chance to look at the handout or fact sheet you gave them. Ask if they have any questions that they did not get a chance to ask you before. Remind them to contact you if they need more information. If you cannot reach someone by phone after leaving three messages, try to reach them another way. For example, you could mail them CDSMP information.



### By Mail

You can also send materials—such as a postcard reminder, fact sheet, or short note—by mail. You can provide another copy of the CDSMP Information and Workshop Schedule. Make sure to repeat the time and place of the next workshop.



### By E-mail

Some people may prefer to be contacted by e-mail. This method gives them a chance to ask questions as they think of them and to contact you at their convenience. It also gives you time to provide current information about a workshop and to respond to people's questions quickly and easily.



See the Ambassador Outreach Plan and Outreach Activity Report.

**PERSON-TO-PERSON AMBASSADOR OUTREACH ACTIVITY REPORT**

Ambassador Name: \_\_\_\_\_  
 Month/Year: \_\_\_\_\_  
 Instructions: Use this table to report your activities. Give it to your Coordinator at the end of each month.  
 Return report to: \_\_\_\_\_  
 Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
 Address: \_\_\_\_\_

Date	Name of the person you talked to	Contact information	Follow-up: How will you make sure this person signs up for a workshop?
7/15/2013	May Smith	555-454-3213 msmith@aol.com	Followup - call in 1 week

## STEP 3: CONNECTING WITH YOUR COORDINATOR

At the end of each month, look at your Ambassador Outreach Plan to assess your efforts. You should also contact your Coordinator to review your activities. You and your Coordinator may decide to meet or talk by phone. Your Coordinator will give you an Ambassador Outreach Activity Report form to keep track of the people you talked with, how each visit went, what questions people had, and what kind of response you received. For example, did the people you talked with sign up for a workshop? Would you change your pitch in the future on the basis of what you learned?

When you connect with your Coordinator, you may want to add any suggestions you have about future activities. You and your Coordinator will also want to use this time to plan your activities for next month.

### SUMMARY

As you can see, YOU are the key to success! We hope that you will find marketing CDSMP workshops easy and fun to do. Here are some tips to remember.

The Ambassador Outreach Strategy has three steps:

Step 1: Preparing to Be a Person-to-Person Ambassador

- Make a plan.
- Prepare and practice your pitch.

Step 2: Marketing the CDSMP Workshops

- Connect with people.
- Make your pitch stick.

Step 3: Connecting with Your Coordinator

- Check in regularly.
- Celebrate your success.

THANK YOU for your valuable contribution to the health and well-being of people in your community. Please contact your Coordinator with your comments or concerns.



Your Coordinator will give you tools and handouts that are customized for your specific needs. They include

- Person-to-Person Ambassador Outreach Plan.
- Ambassador Outreach Activity Report.
- Talking Points Card.
- CDSMP Information and Workshop Schedule.



# NOTES

## Person-to-Person Ambassador Handbook



# SPOKESPERSON AMBASSADOR HANDBOOK



National Center for Chronic Disease Prevention and Health Promotion  
Division of Population Health





# SPOKESPERSON AMBASSADOR

## HANDBOOK

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### INTRODUCTION



The goal of the Ambassador Outreach Strategy is to increase the number of people who participate in self-management education workshops. Audience research conducted by the Centers for Disease Control and Prevention has shown that word of mouth is an effective way to promote the Chronic Disease Self-Management Program (CDSMP). In your area, the workshops may be called by another name, like “Living Well” or “Healthy Living.”

As a Spokesperson Ambassador, you are the key to the success of this strategy. You are an Ambassador because you have experienced the benefits of participating in a CDSMP workshop. We need your special talents. You have experience, and you know how to connect with other people in your community. You were chosen because of your success and your enthusiasm for self-management education. You have what it takes to market the value of CDSMP workshops to groups of people that you know and even to groups of people you do not know in your community.

### How to Use This Handbook

This handbook is set up in three steps with tools and forms to help you “sell” participation in CDSMP workshops. The marketing term *pitch* refers to delivering this message. The first step is preparing to be a Spokesperson Ambassador. You will receive training from your Ambassador Outreach Coordinator that will allow you to plan your outreach approach and practice your marketing pitch. The second step is delivering an effective pitch that convinces people like yourself to sign up for a CDSMP workshop. Finally, in the third step, you will be connecting with your Coordinator on a regular basis to keep him or her informed and to make sure you have the support you need. More details about each step are provided on the following pages.



As you move through each step, you will see icons for Tools  and Tips . They were customized by your Coordinator for your specific location and needs.

## STEP 1: PREPARING TO BE A SPOKESPERSON AMBASSADOR

### Train and Make a Plan

The best preparation is practice. During training, you will have a chance to learn how to use this handbook, how to connect with people, and how to market CDSMP workshops. You will also learn how to make a plan for your outreach efforts. When you participated in a CDSMP workshop, you learned how to make a plan every week to take steps to improve your own health and well-being. That action plan was an important part of your success.



Your Coordinator will give you a Spokesperson Ambassador Outreach Plan form.

SPOKESPERSON AMBASSADOR OUTREACH PLAN				
Name _____				
Month/Year _____				
Who	What	When	Where	Notes
Example: Garden Club Members	I am a guest speaker	July 15, 9:00am	Mary's house	Talk with members of the Garden Club. The computer available to host's use dates.

Your Coordinator will help you identify groups of people in your community to speak with about self-management education. Once you have identified the “who,” then you will need to identify the “how.” Will this be an informal presentation or will you have the time and equipment available to present PowerPoint slides with your presentation? You and your Coordinator need to stay in touch to review your plan and your activities regularly. That way, you can get support for what you want to do and you may be able to help other Ambassadors with your ideas.

### Learning the Basic Message or Pitch

As an Ambassador, you will be talking with groups of people that you may or may not know. You could be at church or a garden club. You might be talking to a group of doctors, faith-based leaders, or other people in your community who can recommend the workshop. Regardless of the circumstances or how you say it, make sure that you deliver this basic message:

**“We all [or many of us] have ongoing health problems. This workshop helped me, and I think it could help you too. Here is how you can sign up.”**

An effective pitch has three parts: the opening, the persuading information, and the closing. If you use all three in every pitch, you will give people good reasons to sign up for a workshop.

Your Coordinator will give you a Talking Points Card that you can carry with you to remind yourself of the three parts of an effective message.

### **1 Part 1: Opening**

Make a connection with the people you are talking to by relating your own experience with a chronic or ongoing health problem. If you have time, you might talk about limitations you have experienced, such as pain, fatigue, or worry that kept you from doing the things you like to do.

*Example:* “Did you wake up this morning with a smile on your face and jump out of bed ready to roll? I know how it is—we have ongoing health problems. There is a workshop that helped me, and I think it could help you too.”



## **Part 2: Persuading**

Describe the benefits of CDSMP workshops. This is the time to “sell” the workshop. Share one or more examples, depending on time, of how the CDSMP workshops helped you.

*Example:* “I got a lot out of this workshop. I learned how to be independent and how to exercise safely and use other techniques for staying active and healthy. Here are some of the benefits I have experienced from participating in a CDSMP workshop:

- “I learned new skills that help me to be more independent so I can do more of the things I like to do.”
- “Now I am in charge of my ongoing health problems instead of health problems being in charge of me.”
- “Everyone at the workshop shares experiences and supports each other.”
- “I learned techniques like exercising safely that have helped me move more easily.”
- “Now, I have more energy and I can breathe more easily when I climb stairs.”

Add other examples from your own experience.

## **Part 3: Closing**




Show people how to sign up for CDSMP workshops. Make sure everyone you talk to knows how to sign up. Give them a handout with information about upcoming workshops.

*Examples:* “Here is how to sign up for a workshop. What can I do to help you sign up and participate?” and “There’s a workshop close by that is coming up. Here is information about it. It’s a great way to meet other people like us, and it’s fun.”




Discuss the workshop information. Ask people if they have questions or if you can remind or assist them to participate. Give people the CDSMP Information and Workshop Schedule.

### Talking Points Card

**MAKE THE PITCH**

-  **Opening:** Make the connection...
-  **Persuading:** Describe the benefits...
-  **Closing:** Demonstrate how to sign up...

**MAKE THE PITCH**

-  **Opening:** Make a connection.  
“We both or we all have ongoing health problems. This workshop helped me and think it could help you too.”
-  **Persuading:** Describe the benefits.  
“I got a lot out of the workshops. Learned how to be more independent, how to exercise safely, and how to use other techniques for staying active and healthy.”
-  **Closing:** Demonstrate how to sign up...
  - “Here is how to sign up for a workshop. What can I do to help you sign up and participate?”
  - Hand out the ASMP or CDSMP Information and Workshop Schedule.



### TIP

Audience research has found that people are most interested in the benefits that help them maintain independence and do the things they like to do.

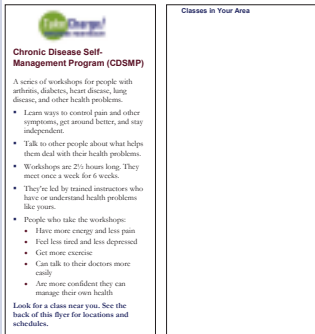
## STEP 2: MARKETING THE CDSMP WORKSHOPS

### How to Connect with People

Now that you have planned and practiced your pitch, you will be reaching out to the groups of people that you identified. The CDSMP pitch in your Handbook provides an outline for you to follow when preparing your pitch. The style of the conversation will vary depending on your audience and how much time you have to talk.



See the Chronic Disease Self-Management Program Information and Workshop Schedule.



### How to Make the Most of Your Time with People

- **Listen carefully** to determine what information will convince the audience members that a CDSMP workshop is worth attending.
- **Maximize your time with people** by focusing on the basic messages. Be prepared to answer questions, but only spend extra time on details if audience members express interest and you have the time.
- **Make it easy to recommend the workshops** by organizing packets of outreach materials in advance. That way, you can give people all the information they need. Pay attention to questions and reactions and tailor your messages as needed. Emphasize the benefits that make the workshop worthwhile.
- **Make it easy for people to participate.** Ask yourself, what information do these audience members need to know? What resources do they need? Use the CDSMP Information and Workshop Schedule or other materials that your Coordinator gave you. Handouts will help people sign up for workshops.

### Make Each Pitch a Home Run

If possible, have a contact sign-in sheet for your audience. Follow up with the people you talk with to reinforce the messages you have communicated during your presentation and to make it easy for them to sign up for a workshop. For best results, consider contacting people more often in the weeks right after your presentation. Make sure you contact people who appear to be interested early enough so they have time to sign up for a workshop.

Staying in contact with people does not need to take a lot of time. Use the notes from your Ambassador Outreach Report to create a follow-up plan that works for you and the amount of time you have.



Here are some suggested ways to stay in contact with people:



### By Phone

Call the people you talked with soon after meeting them. Ask if they have had a chance to look at the handout or fact sheet you gave them. Ask if they have any questions that they did not get a chance to ask you before. Remind them to contact you if they need more information. If you cannot reach someone by phone after leaving three messages, try to reach them another way. For example, you could mail them CDSMP information.



### By Mail

You can also send materials—such as a post card reminder, fact sheet, or short note—by mail. You can provide another copy of the CDSMP Information and Workshop Schedule. Make sure to repeat the time and place of the next workshop.



### By E-mail

Some people may prefer to be contacted by e-mail. This method gives them a chance to ask questions as soon as they think of them and to contact you at their convenience. It also gives you time to provide current information about a workshop and to respond to people's questions quickly and easily.



### TIP

Incorporate lessons learned as you refine your approach for future outreach visits.

## STEP 3: CONNECTING WITH YOUR COORDINATOR

At the end of each month, look at your Ambassador Outreach Plan to assess your efforts. You should also contact your Coordinator to review your activities. You and your Coordinator may decide to meet or talk by phone. Your Coordinator will give you an Ambassador Outreach Activity Report form to keep track of the groups you talked with, how each visit went, what questions people had, and what kind of response you received. For example, did the people you talked with sign up for a workshop? Would you change your pitch in the future on the basis of what you learned?

When you connect with your Coordinator, you may want to add any suggestions you have about future activities. You and your Coordinator will also want to use this time to plan your activities for next month.



See the Ambassador Outreach Plan and Outreach Activity Report.

**SPOKESPERSON AMBASSADOR OUTREACH ACTIVITY REPORT**

Ambassador Name \_\_\_\_\_  
 Month/Year \_\_\_\_\_

Instructions: Use this table to report your activities. Give it to your Coordinator at the end of each month.

Return report to: \_\_\_\_\_  
 Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
 Address: \_\_\_\_\_

Date	Name of the group you talked to	Contact information	Follow-up: How will you make sure these people sign up for a workshop (e.g., email, remark card, postcard)?
Example: 1/28/13	Westfield Community Church women's group	553-454-3322 westfieldchurch@aol.com	Postcards and class schedule; send postcards in 1 week.

## SUMMARY

As you can see, YOU are the key to success! We hope that you will find marketing CDSMP workshops easy and fun to do. Here are some tips to remember.

The Ambassador Outreach Strategy has three steps:

### Step 1: Preparing to Be a Person-to-Person Ambassador

- Make a plan.
- Prepare and practice your pitch.

### Step 2: Marketing the CDSMP Workshops

- Connect with people.
- Make your pitch stick.

### Step 3: Connecting with Your Coordinator

- Check in regularly.
- Celebrate your success.

THANK YOU for your valuable contribution to the health and well-being of people in your community. Please contact your Coordinator with your comments or concerns.



Your Coordinator will give you tools and handouts that are customized for your specific needs. They include

- Spokesperson Ambassador Outreach Plan.
- Ambassador Outreach Activity Report.
- Talking Points Card.
- CDSMP Information and Workshop Schedule.

# NOTES

## Spokesperson Ambassador Handbook



# NOTES

## Coordinator's Guide



