

Chapter 2



Developing a Marketing and Promotion Plan

2. DEVELOPING A MARKETING AND PROMOTION PLAN

In This Section

This section covers how to lay the groundwork for implementing your approach to marketing chronic disease self-management interventions—specifically self-management education and physical activity interventions—to primary care practices. It reviews the elements you'll need to consider when developing your marketing and promotion plan. Topics include:

- Choosing interventions to promote
- Choosing locations on which to focus your outreach efforts
- Identifying providers or practices you want to target for outreach
- Establishing your marketing team
- Managing your outreach initiative
- Finding strategies for success

GETTING STARTED

Before you begin your outreach activities, there's some groundwork to do. The process begins with developing a marketing and promotion plan to chart a course for your outreach activities. You may want to document this plan so that you and your team can refer to it as needed. You can download the **Marketing and Promotion Plan** template provided in this toolkit from www.cdc.gov/arthritis/interventions/marketing-support/1-2-3-approach. A copy of the template is included in **Appendix C**. Update your marketing and promotion plan as you refine and evaluate your efforts.

When planning for provider outreach, identify the following information:

- **Objective(s).** What are you trying to achieve by promoting self-management education workshops and physical activity classes to local PCPs? You may have specific, immediate goals—such as increasing the enrollment of a particular class by 20%—as well as broader, long-term goals—like establishing an ongoing relationship with providers in a particular health care network. If you are conducting the outreach as part of a grant or partnership, there may be targets you need to meet to fulfill the terms of your agreement.
- **Partners.** If you're working with other organizations or programs to coordinate and conduct provider outreach, define the scope of your relationship with them and their role in your initiative.
- **Interventions to promote.** Determine which interventions your marketers will promote. Think through the rationale and criteria you use to select them. Additional guidance on choosing interventions is discussed later in this section.
- **Locations.** Where in the community will you focus your marketing and promotion efforts? Factors such as class availability, provider office locations, staffing, resources, and geography will inform your decision about where to conduct your outreach. Document your rationale and criteria for determining locations so that you can refer to it and refine it as needed. Additional guidance on choosing locations is discussed later in this section.
- **Providers to target.** Identify PCP groups, practices, or networks you want to target and document your strategies and criteria for selecting individual providers. You may want to start with providers you already know. A pilot test of the 1•2•3 Approach found that initiating contact with providers is the most challenging step in the process. Having a pre-existing relationship with a practice or a particular provider can help you get a foot in the door. Additional guidance on choosing providers is discussed later in this section.

- **Budget and staffing.** Document your funding sources and allotted budget, as well as the number of staff you expect to need or have available to work on outreach activities. Estimate major expenses like staffing, printing, travel (for marketers conducting the outreach visits), and partner incentives.
- **Potential obstacles and challenges.** Try to anticipate potential obstacles and challenges, such as competing programs, lack of staff time and resources, unresponsive providers, or geographical and logistical issues.
- **Outreach strategy.** For each step in the process—from planning activities through outreach and followup—identify the resources needed and staff responsible for the tasks. Draft a timeline for completion. Document possible strategies for addressing anticipated challenges.
- **Evaluation strategy.** Identify the time and resources needed and the staff responsible for evaluation tasks. Draft a timeline for completion.

Clearly defining the “what,” “where,” and “whom” is key to planning your outreach work. Here are some suggestions for selecting interventions, locations, and providers.

CHOOSE INTERVENTIONS TO PROMOTE

Provider outreach can be particularly useful for promoting interventions that are falling short of target enrollment goals. Work with partner organizations to determine which interventions should be the focus of your marketing efforts. Make sure to call the facilities offering the classes to confirm scheduling information.

When choosing which interventions to promote, focus on ease of access. Key factors are the local availability of classes and the proximity of classes to PCP offices. As you identify PCPs to target and learn more about the patients they see, you can use this information to help select interventions. Many of the interventions are beneficial for a variety of chronic diseases, but some are designed for specific conditions like arthritis. If you know that a practice sees a high percentage of patients with a particular condition, highlight the interventions that work best for that condition.

Consider focusing on just one or two interventions when you launch your initiative. As you and your team build experience and confidence and begin to work more efficiently, add interventions to your list. Depending on the size and availability of your team and the number of classes and locations, you might work toward promoting classes for up to four or more interventions. If partners or other programs within your organization are already promoting these or similar interventions, try to coordinate efforts to leverage resources, avoid redundant activities, and maximize your reach.

CHOOSE LOCATIONS

Once you’ve chosen the interventions you’re going to promote, take a look at where the classes are being offered. Given your staffing resources and the proximity of the classes to your office and to providers’ offices, it may not be feasible to market to all locations when you launch your initiative. To start, choose areas that are easy for your staff to get to and that are covered by several PCPs or by a PCP network you want to target. Factor in whether classes for other self-management interventions are also offered nearby, particularly if you are promoting more than one. You’ll also want to consider the accessibility of the locations to patients and the availability of services such as public transportation and parking facilities. As you and your team build experience, add locations to your list.

IDENTIFY PROVIDERS

The key step in the planning process is identifying the practices you want to target for your marketing efforts. To do this, you’ll need to find out basic information about providers in the area, such as:

- Do they see or are they likely to see a high percentage of patients with chronic disease?
- Where are they located?
- Have they recommended self-management education workshops or physical activity classes to patients before?
- Who are the potential office champions at these practices?
- What is the proximity of the practice to class locations?



Here are some criteria you can use to target PCPs.

Type of Practice

Focus on family, internal, and general medicine practices that care for adult patients. Compared to specialists, primary care practices see a higher volume of patients with whom they have more established relationships, which may provide multiple opportunities for them to recommend the interventions. The 1•2•3 Approach requires a dedicated initial investment to fully engage providers. If you have limited staffing or other resources, PCPs offer the best value. If you plan to approach specialists, consider doing so once you have established relationships with a network of local PCPs.

You can locate information on providers in your area by checking with the following sources:

- State health department (e.g., Medicaid Program office)
- Local chapters of professional associations (e.g., American Medical Association, American Academy of Family Physicians)
- Local health systems (e.g., health maintenance organizations [HMOs], hospitals, multi-physician practices, Federally Qualified Health Centers)
- Word-of-mouth from colleagues

Existing Relationships


A pilot test of the 1•2•3 Approach (17) found that having a pre-existing relationship with a provider was a critical factor in helping marketers gain access to busy practices. As you plan your outreach strategy, see if your staff or colleagues have established a rapport with any local PCPs. Plan to engage those providers first. Not only can they quickly become your first channel for recommendations, they can also help you establish credibility and influence other providers to open their doors to you. Partnering with other community-based organizations, public health agencies, or social service organizations that are connected with local physician networks can also expand your provider base.

Geography

Identify the locations of the self-management education workshops and physical activity classes in your area and focus on PCPs who practice nearby. Use publicly available resources to learn who the local providers are and where their practices are located.

Provider directories can be a particularly helpful resource and are often available online. Obtain directories of providers affiliated with health care organizations and facilities serving the area, including:

- Primary health care systems
- Insurance carriers
- Academic medical centers
- Local chapters of national professional or advocacy groups, such as the American Academy of Family Physicians, and the Arthritis Foundation

Consult the directories for the addresses of local providers and select those who fall within an acceptable radius of class locations.  **See sidebar on page 16.** Use tools such as Google maps to confirm driving distances or public transit systems for routes, stops, and schedules to determine accessibility.

Provider Interest in Self-Management

Providers with an interest in self-care, prevention, or wellness strategies may be particularly amenable to outreach visits. Find out who these PCPs are in your community by:

- Asking colleagues or providers you know who have expressed an interest in patient self-management for chronic disease
- Asking local class instructors or other patient educators which providers have previously recommended their classes to patients
- Determining which health systems or other clinical networks provide funding or other institutional support for self-management programs
- Seeing which practices are participating in local care coordination initiatives, such as accountable care organizations or patient-centered medical homes



How Far Is Too Far?

Consider how far people with chronic disease are willing and able to travel. Data from the Arthritis Foundation indicates that people prefer to travel no more than 10–20 minutes or 7–10 miles for community-based programs.*

A good rule of thumb is to target primary care practices within a 5- to 10-mile radius of class locations. However, what is deemed an “acceptable” distance will vary by an area’s density, transportation options, and local custom. When determining the target radius, consider the following:

- **The characteristics of the area.** Is it urban, suburban, or rural? People living in suburban or rural areas may be more willing to travel longer distances to attend classes. For people in urban areas, even shorter distances may add up to longer travel times when factoring in traffic patterns, parking options, and public transportation schedules.
- **Transportation options.** What public transportation options are available in the area? Consider the reliability of commuter bus and rail lines, walking distance from transit stops to PCP offices or class locations, and the number of transfers required. See if subsidized door-to-door shuttle services for seniors or the disabled are offered in the community.
- **Local custom.** In many rural areas, it is not uncommon for people to travel 30 minutes or more to shop or participate in community events or activities. If you are promoting interventions in communities where people are willing to travel long distances, you can expand your outreach efforts to include providers who are located more than 10 miles from class locations.

*Arthritis Foundation. *Assessing the Needs of Current and Potential Users of Arthritis Foundation Program and Services*, May 2003 [unpublished report].



TIP ▶ Consider approaching osteopathic or other holistic medical practices. The self-management approach to chronic disease aligns well with the emphasis these practices place on wellness and treating the “whole patient.”

Use the **Provider Outreach Tracking Spreadsheet** to document information such as the name of the practice/ individual provider(s), the type of practice (e.g., family practice, internal medicine), contact information, dates of contact, and other relevant details. A sample tracking sheet is included in this toolkit. You can download and customize the template as an Excel spreadsheet from www.cdc.gov/arthritis/interventions/marketing-support/1-2-3-approach.

 See Chapter 4 for details on how to use this tool.

ESTABLISH YOUR MARKETING TEAM

As part of the planning process, you’ll need to select and train a team of people who will be responsible for promoting the chronic disease self-management education and physical activity interventions in your community. Team members can include employees from your own organization or agency, other departments or programs within your organization, or community partners. Responsibilities of your team will include:

- Planning, oversight, management, and training
- Preparing materials for outreach
- Making initial contact with providers
- Conducting outreach visits
- Coordinating and tracking outreach efforts
- Evaluating and assessing efforts

Although the size of your marketing team will vary and some responsibilities will overlap, you are likely to need at least one staff person to focus on program management and/or outreach during the startup phase. Initial outreach is likely to require the greatest amount of effort, so consider staffing accordingly. Outreach work should be led by staff who are available and have flexible schedules. Information gathering, logistics, and coordination can be done by part-time staff, interns, or volunteers.



When selecting marketing team members, look for those who have experience with:

- Customer service or direct contact with the public
- Designing, promoting, or implementing community outreach activities
- Chronic disease self-management education and physical activity interventions
- Working in health care settings
- Internet research
- Microsoft Word and Microsoft Excel

It isn't necessary for your intervention marketers (i.e., those staff members who will conduct the provider outreach visits) to have extensive experience with social marketing or outreach. However, staff best suited for this task should have the following characteristics:

- Knowledge about and enthusiasm for the interventions
- Good active listening skills
- Flexibility and adaptability in one-on-one interactions
- An open, approachable, and professional demeanor
- Ability to project a comfort level and confidence with the information being provided
- Some familiarity with medical terminology


Marketing teams who piloted the 1•2•3 Approach found that an important element of success is having marketers who are well informed about chronic disease self-management in general and familiar with the interventions they are promoting. This allows them to more easily and concisely communicate outreach messages and gives them credibility with providers. Marketers with experience as a class leader or participant may be particularly well received. Being able to speak with authority about an intervention and showing a genuine interest in and enthusiasm for it can help your marketers avoid sounding like they're making a sales pitch.



TIP ▶ In some local medical communities, a marketer's job title or advanced degrees are considered better markers of knowledge and credibility. Assess your community and staff your team accordingly.

Staff not comfortable with conducting outreach visits can contribute by assisting with planning and preparation (e.g., identifying providers, customizing materials), maintaining schedules (of outreach and followup), tracking information for evaluation, and coordinating overall outreach efforts.

MANAGE YOUR OUTREACH INITIATIVE

It is estimated to take at least 6 months to ramp up your outreach efforts and establish relationships with a practice; however, regular followup is necessary for nurturing successful relationships with providers and ensuring a steady stream of recommendations for the classes you are promoting. Expect your outreach program to be an ongoing effort.  **See sidebar for timelines on page 18.** Review these suggestions for developing a realistic and efficient timeline of activities.

Consider your marketing team's own resources and workload, the number of practices to engage, and the anticipated responsiveness of the PCPs.

Start laying the groundwork early. Assemble the team as soon as possible to begin identifying providers and customizing marketing materials. Train intervention marketers while planning and preparation are under way.

A tiered or phased approach can help you and your team be more flexible. Launch initial outreach efforts at a small number of practices based on factors such as proximity, volume of eligible patients, and whether there is a pre-existing relationship with the practice. Add more practices later as you and your team refine and gain comfort with the approach. One suggestion is to begin initial phone calls with providers who



Sample Marketing Timelines

Marketing Efforts

ACTIVITY	TIME
Identify interventions to promote and select PCPs	Months 1–2
Contact practices and schedule outreach visits	Months 2–6
Conduct periodic follow-up activities	Ongoing

Spring Classes

ACTIVITY	MONTH
Identify interventions to promote and select PCPs	November–December
Contact practices and schedule outreach visits	December–March
Begin classes	April
Conduct periodic follow-up activities	April–September

Fall Classes

ACTIVITY	MONTH
Identify interventions to promote and select PCPs	April–May
Contact practices and schedule outreach visits	May–September
Begin classes	September
Conduct periodic follow-up activities	September–April

have been referred by colleagues or providers you know. As your team talks to providers, ask them if they're willing to recommend other colleagues who might be interested in talking to you.

Build follow-up activities into your timeline. When you are not busy engaging new providers or promoting a new season of classes, get in touch with providers—by phone, mail, e-mail, or in person—with whom you've already conducted outreach visits. See if they have any questions or feedback from patients. Keep them informed of any schedule changes or upcoming classes for the next season.

STRATEGIES FOR SUCCESS

Although the task may seem daunting, developing an effective provider outreach program is a realistic goal. Here are some general strategies for overcoming obstacles and maximizing success.

Be Ready to Invest the Effort


Leave substantial time for initial engagement, as it can take multiple attempts to get practices to respond to initial contact. It will also take time to establish your credibility in the local medical community. Even after you've had some success conducting outreach visits, the results—in terms of increased provider recommendations and class enrollment—won't be immediate. The 1•2•3 Approach is a long-term investment, so be prepared to play the long game.

Tap Into Existing Networks

Use relationships with reputable colleagues and providers to gain access to practices. These “influencers” can affect the participation of other providers by publicizing support for the interventions you're promoting. They can help you tap into local community provider networks. In the short term, this increases your familiarity and credibility with members of the local medical community, and raises the profile of the interventions you are promoting. In the long term, linking to the existing network helps create an ongoing support base of local providers and expands the reach of evidence-based chronic disease self-management education and physical activity interventions by integrating them into local health care systems.



Evaluate and Refine Outreach Efforts

Evaluating outreach efforts is important in determining what works and what doesn't. It allows marketers to further refine their strategies and target their messages. Other sections of this marketing guide cover strategies for evaluating your outreach efforts; customizable evaluation tools are included in this toolkit.  See Chapter 5 for more information on evaluation. Plan ahead to ensure contact with providers is being tracked and class instructors have feedback forms to hand out to participants.

Anticipate Barriers to Successful Marketing

Lack of Time. With competing tasks and priorities, your marketing team's resources may be limited. To manage their efforts efficiently, try these time management strategies:

- Have junior staff, interns, or volunteers conduct the initial research to target local practices.
- Leverage the available resources from partner organizations.
- Employ a tiered or phased approach to engaging providers.

Lack of Marketing/Outreach Experience. The materials provided with this marketing guide are designed to prepare you and your marketing team regardless of your level of experience. Marketers are encouraged to thoroughly review all materials and to role play with other staff members (or a willing local provider) before taking the outreach to the field.



TIP ▶ Employing a tiered or phased approach by initiating outreach with providers who are familiar or have expressed particular interest in chronic disease self-management interventions may help marketers gain a comfort level and refine their techniques.

Competing Programs. In areas where self-management education and physical activity programs for chronic diseases abound, you will need to make the interventions you are marketing stand out. Have your marketers become familiar with other interventions offered in the area. Be prepared to detail the distinctions between them and the intervention you are promoting when reaching out to providers.

During the planning phase, determine whether there are similar interventions being promoted within the community for chronic health conditions. Conduct a survey of the activities under way both internally (i.e., in other offices or programs within your organization) and externally (i.e., at partner organizations and local agencies). Here are some suggestions for collecting the information you need:

- **Reach out to colleagues.** Inform other program managers within your organization and at partner organizations about the interventions you will be promoting. Ask them if they have similar activities under way.
- **Search the Web.** Survey the Web sites of local health care organizations and facilities (e.g., hospital-based outpatient and wellness clinics) and social service agencies (e.g., the local YMCA) for information about self-management classes available to the community. Check to see if facilities likely to host the classes—community and senior centers, recreational facilities, schools—have schedules posted online.
- **Look to local media.** Review local media outlets like newspapers, community bulletins, or blogs for announcements about new classes.



TIP ▶ Stay up-to-date on chronic disease self-management interventions being offered in the community by signing up to receive mail or electronic newsletters and updates from local organizations. You can also follow these groups through social media channels such as Facebook and Twitter.

To avoid inundating providers and patients with options and to make sure that the interventions you are promoting don't get lost in the shuffle, pool and coordinate efforts across programs (where possible) to promote all interventions together. Where available, have your marketers highlight interventions that are effective for multiple chronic diseases. When conducting outreach visits, marketers should be prepared to detail the distinctions between other local interventions and the classes you are promoting.

Difficulty Scheduling Outreach Visits. While providers are amenable to and may prefer in-person educational visits over other modes of dissemination (such as conference presentations or flyers/mailers), these visits can be disruptive to the practice. There is the effort that staff must spend scheduling visits and the time that must be set aside during regular office hours to conduct the visit. Some practices prefer unscheduled drop-in visits.

Here are some tips for getting past the scheduling hurdle:

- **Engage gatekeepers.** Practice managers and front desk staff can be key allies. Establishing a rapport with them can help you gain an “office champion” who can encourage providers to be more receptive to your efforts.
- **Be flexible.** Use your initial contact with the practice to determine whether drop-in or scheduled visits are preferred. If provider availability is especially limited, agree to meet with other staff members such as nurses, medical assistants, patient educators, and other service coordinators. They can pave the way for direct contact with the provider, and may even generate recommendations on their own.
- **Be ready to go on short notice.** Have multiple marketers trained and available to take immediate advantage of a provider's interest and window of availability. Those with a standard, well-practiced pitch and a surplus of printed materials need less time to get ready for an outreach visit. Staff your marketing team with individuals whose other responsibilities allow them to juggle their schedules at the last minute.

Draft the Marketing and Promotion Plan

It's important to have a plan in place before launching your provider outreach. Thinking in advance about items such as your objectives, targeted providers and interventions, overall strategy, and potential challenges will help ensure that your team members and partners are working toward a shared goal. Planning also allows you to consider what resources you need to get the work done. A documented marketing and promotion plan can be a useful guide for new team members, as well as for partners and sponsors. It can also be a good reference as you evaluate and refine your approach.

 See pages 13 and 14 for a detailed discussion of the elements of a marketing and promotion plan.

These elements were used to build the Marketing and Promotion Plan template. A snapshot of the Microsoft Word template appears below. Complete each section as prompted and delete the prompts when you're finished. Keep this document on file and modify it as needed.



THE 1-2-3 APPROACH TO PROVIDER OUTREACH

Marketing and Promotion Plan

[Your Organization Name]

[Your Program Name]

Date:

Objectives
[What are your specific, immediate goals (e.g., increasing enrollment of a particular class by 20%)? What are your broader, long-term goals (e.g., establishing an ongoing relationship with providers in a particular health care network)? Note any targets you need to meet to fulfill the terms of a grant or partnership agreement.]

Partners
[List partner organizations and the scope of their work in your provider outreach initiative.]

Interventions
[Identify the interventions your team is promoting.]

Locations
[Where in the community will you focus your marketing and promotion efforts? Think through your rationale and criteria used to select them—e.g., class availability, provider office locations, staffing, resources, geography.]

Targeted Providers
[List the practices or networks you want to target; add names of individual providers once identified. Think through your rationale and criteria used to select practices and individual providers—e.g., geography, type of practice, established relationship.]

What You'll Need

Appendix C: Training and Marketing Tools

- Marketing and Promotion Plan template