

Guide to Promoting Professional Development



**Centers for Disease
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Introduction

Professional Development Overview

Professional development (PD) is a term used to describe a variety of learning or training opportunities that can help people improve their professional knowledge, competence, skill, and effectiveness. PD is designed to provide an active learning environment that allows participants to master specific learning objectives. It can include trainings, workshops, online or distance learning courses, information sessions, and technical assistance.

If your agency or organization coordinates or conducts PD services for clients working in education, your goal is to help them increase their skill level as a way to improve outcomes. For example, in a school setting, you might offer workshops to teachers to help them learn more effective teaching strategies or build their skill in a specific subject or to provide guidance on how to add physical activity breaks to their classrooms.

The result would be more successful students. At the state level, you might offer technical assistance for creating supportive learning environments to school superintendents, with the goal of raising student test scores.

However, before you can improve the skills of your target audience, you must get them to attend and participate in your PD events. Many people who offer PD services think, “If I provide it, they will come.” But this approach doesn’t often work. It can be hard to get people to take advantage of PD opportunities. Busy professionals may not notice what you have to offer, or they don’t see the value of your services. Or they may not commit to attending your PD events, which makes planning difficult.

The Centers for Disease Control and Prevention’s (CDC’s) School Health Branch created this revised *Guide to Promoting Professional Development* to help agencies and organizations that offer PD better promote their services. This guide is based on a previous version, called *Step-by-Step: Marketing Professional Development Services*, which was created for CDC by RMC Health. It can be used by a variety of PD providers, including state departments of health, state departments of education, partners and contractors working in these fields, and nongovernmental organizations.

This guide provides ideas and best practices that professionals can use to get specific audiences interested in their professional development events and services. It is not meant to be a marketing plan.

Objectives

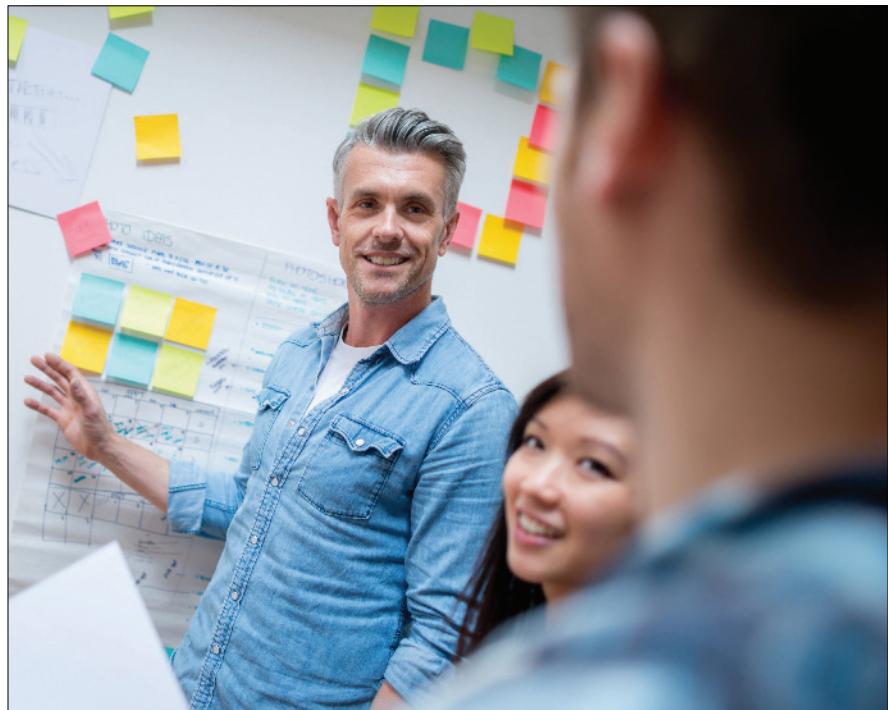


This guide:

- Identifies the four steps for promoting professional development.
- Helps you develop a promotional plan that meets the needs of your target audiences.

By learning to promote your services more effectively, you can reach the professionals who can most benefit from your PD events, resources, and technical assistance. Specifically, this guide provides information, resources, and examples to help you:

- Identify appropriate audiences for your PD services.
- Reach these audiences with relevant and well-defined services that are based on best practices.
- Design and share appealing materials that will increase interest, investment, and participation from these audiences.



Professional Development Practices

The ultimate goal of PD is to teach skills and strategies that, when used, will have a positive effect on outcomes. CDC developed a set of recommended Professional Development Practices that are based on research and best practices. Using these practices will create ideal conditions for new skills to be applied. These practices can be used to deliver PD in group settings like workshops, presentations, and webinars. They can also be used in one-on-one settings—for example, through technical assistance or coaching.

These practices are as follows:

- **Sustain a Professional Development Infrastructure**

Set a high standard of practice for your PD efforts.
Provide leadership and skilled staff who can implement a results-based plan.

- **Design Professional Development Offerings**

Design trainings and technical assistance programs that are ideal in length and based on learning theory and best practices.

- **Promote Professional Development Services**

Use promotional strategies that capture the attention of your target audiences and get them to request your PD services.

- **Deliver Professional Development**

Use trainings and technical assistance designs that will have a positive effect on learning and create change.

- **Provide Follow-Up Support**

Strengthen the knowledge and skill level of your participants through continued and targeted follow-up support.

- **Evaluate Professional Development Processes**

Collect usable data throughout the PD process and use these data to guide your practices and report your successes.

More detailed information about these practices is available on CDC's [Professional Development and Training website](#).

The Four Steps of Promoting Professional Development Services

The four steps in this guide were adapted from the “Promote Professional Development Services” practice, which is one of the PD practices developed by the CDC Healthy Schools program (see previous section).

Step 1. Identify the PD services that will match your target audience’s needs.

Step 2. Develop a comprehensive promotional plan.

As part of this plan:

- Develop SMART objectives that describe the results to be achieved.
- Develop and pretest messages and materials that will appeal to your target audiences.
- Create a timeline.
- Identify measures of success.
- Recruit partners who can support your plan and help you achieve your objectives.

Step 3. Implement your plan.

Step 4. Collect evaluation data to assess your plan and guide any changes.

As part of this process:

- Record your data in a data management system.
- Monitor and adjust your plan, materials, and messages as needed.

The following sections of this guide will provide more detail about each step.

SMART objectives are
Specific,
Measurable,
Achievable,
Realistic, and
Time-phased.

Step 1. Identify the Professional Development Services That Will Match Your Target Audience's Needs

Identify Your Target Audiences

Target audiences are the select groups of people that you want to reach with your message. Promotional activities start with knowing what motivates these groups of people. Typically, people who work in marketing will “segment” a population into different groups that have similar characteristics, behave in a similar manner, or are part of a particular social or interest group. If marketers have several audience segments, they often develop a different marketing plan for each group, or they tailor different elements of their overall plan for each group.

An audience profile is a good place to start as you identify the individuals or groups you want to reach. This profile provides a snapshot of your target audience and is crucial to your promotional plan because it gives you insight into how to reach the members of this audience and how much they may be interested in your services.

The best way to get buy-in from your target audience is to frame your message in a way that addresses their perspective, needs, and interests. You cannot meet this goal if you don't know and understand your audience.



The Four Steps of Promoting PD Services

Step 1. Identify the PD services that will match your target audience's needs.

Step 2. Develop a comprehensive promotional plan.

Step 3. Implement your plan.

Step 4. Collect evaluation data to assess your plan and guide any changes.

Conduct a Needs Assessment

A needs assessment is a formal process designed to collect information on how to effectively reach your target audience. In the business world, members of this audience are called “customers.” It might be helpful to think of your audiences as customers when you think about promoting your PD services. Success in your efforts—defined as people contacting you for PD services or attending your PD events—is often directly related to how customer-centered and customer-focused you are.

The needs assessment is often your first chance to create a relationship with your target audience. The better and more long-term this relationship is, the better you will be able to “sell” what you have to offer.

Your needs assessment will help you focus your promotional efforts. The information gathered can be used to describe and sell the right PD services to the right audiences in a way that gets noticed.

For your needs assessment, you should collect the following types of information:

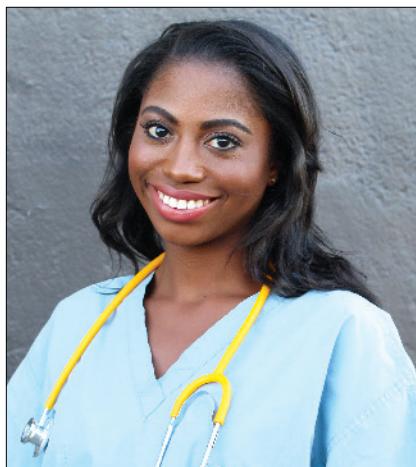
General Information About the Target Audience

- The best ways to reach the identified audience—for example, by phone, e-mail, or mail.
- Approaches best suited to motivate the audience to act.
- PD services that are of the most interest.
- The best “windows” of opportunity for reaching the audience.
- Barriers that prevent the audience from participating in PD events or implementing the skills learned.
- Motivators that will encourage the audience to participate in PD events.
- How to tap into the “what’s in it for me” angle.

Talk with the people you’re trying to reach. You want your PD services to meet the needs of your audience. These conversations can create excitement and anticipation and help you “sell” the right PD services to the right audiences.

Information About Audience's Interest in PD Services

- What are their professional goals related to improving the health of children and young people?
- How can you help them reach these goals?
- What is their level of comfort teaching the content?
- Can you show them how to use a variety of instructional approaches?
- What are their resource needs?
- What types of PD or continuing education hours do they need?



Potential Audiences for PD in School Settings

- Teachers
- Other district and school staff
- School nurses
- Public health employees
- School administrators
- Community members
- Parents

Step 2. Develop a Comprehensive Promotional Plan

The Four Steps of Promoting PD Services

Step 1. Identify the PD services that will match your target audience's needs.

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Step 3. Implement your plan.

Step 4. Collect evaluation data to assess your plan and guide any changes.

Now that you've identified your target audiences, their needs, and the best ways to communicate with them, you can begin designing a promotional plan to achieve your desired PD outcomes. This plan will include all of the strategies you intend to use to capture your target audiences' attention and prompt them to act—in this case, to request your PD services or attend your PD events. A written plan will keep you focused on how promoting your PD services helps you achieve your program goal(s).

Set Your Goals

Before you get started, you should set specific goals. These goals will help you set SMART (**S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**ime-phased) objectives. Goal statements help you answer the question, "How do I know I have motivated my clients to use my PD services to improve their skills and improve outcomes?"

An example of a good goal statement is, *"School Wellness Teams will be aware of and participate in professional development services offered by our agency that are relevant to their needs."*

See Figure 1 for an example of a promotional goal set by a state department of education that offers PD workshops for School Wellness Teams.

Good promotional goals:

- Are declarative statements that describe a desired outcome.
- Avoid jargon and use language that most people are likely to understand.
- Use language that communicates the complete idea of your goal as simply and briefly as possible, leaving out unnecessary detail.
- Use clear language that is easy to understand.
- Are framed in positive terms and avoid the use of double negatives.
- Provide a framework for your objectives, which are stepping stones toward your goals.

Figure 1. Example of a Professional Development Promotional Goal

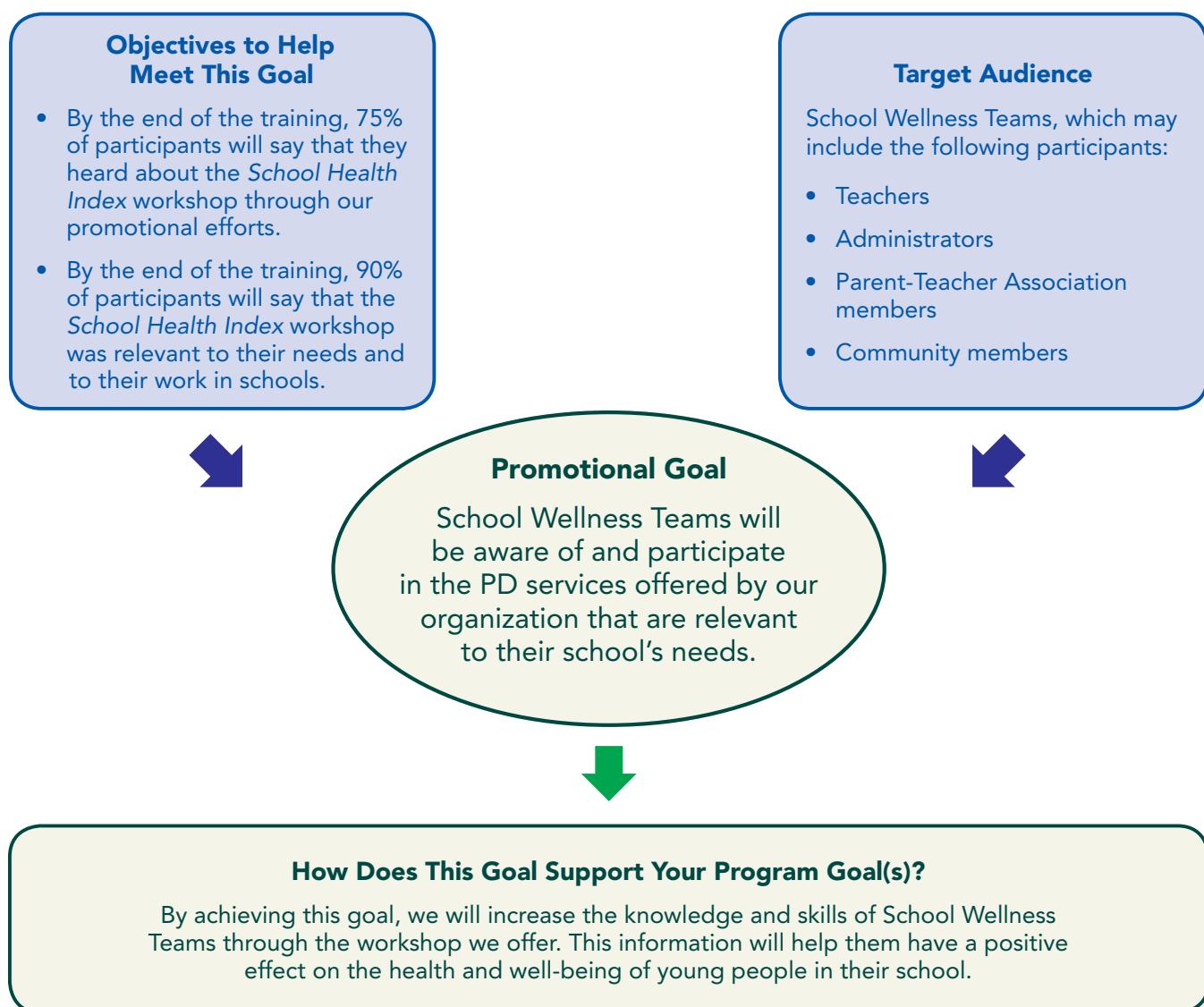
Organization Name: State Department of Education.

PD Services: Workshops for School Wellness Teams to teach them how to use CDC's School Health Index: Self-Assessment and Planning Guide to improve the health and safety policies and programs in their schools.

Promotional Activities: Workshops promoted through e-mails and newsletters sent to schools and information posted on social media. We will also ask School Wellness Teams if we can make presentations at their monthly meetings.

Data Collection Activities: We will survey participants when they register to find out how they heard about our workshop. We will also survey participants at the end of each workshop to find out if they believe this training met their needs.

Timeframe: 2-year timeline. Promotional activities for 3 months. Workshops offered every 3 months for 18 months. Evaluation data analyzed for 3 months.



How to Create a PD Promotional Plan

- Develop SMART objectives that describe the results to be achieved.
- Develop and pretest messages and materials that will appeal to your target audiences.
- Create a timeline.
- Identify measures of success.
- Recruit partners who can support your plan and help you achieve your objectives.

Create Your Promotional Plan

Develop SMART Objectives That Describe the Results to Be Achieved

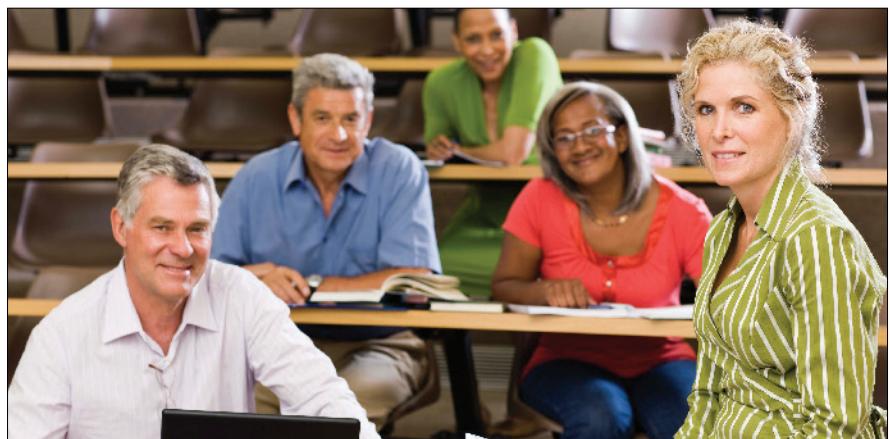
Objectives are statements that describe your desired results and how they will be achieved. They are the basis for monitoring progress toward meeting goals and setting targets for accountability. Objectives are intended to help you measure the effect of your promotional efforts on awareness of and participation in your PD services, not the impact of these services. Your objectives should support the broader program objectives and goals in your annual work plan. Objectives should also be SMART.

Visit the CDC website for more information about [SMART objectives](#).

EXAMPLE

SMART Objectives for a School Health Index Workshop

- By the end of the training, 75% of participants will say that they heard about the *School Health Index* workshop through our promotional efforts.
- By the end of the training, 90% of participants will say that the *School Health Index* workshop was relevant to their needs and to their work in schools.



Develop and Pretest Messages and Materials That Will Appeal to Your Target Audiences

Develop Key Messages

Key messages should be simple and easy for the target audience to understand. They can be general messages that appeal to several target audiences, or they can be specific to the needs and interests of a specific audience segment.

Keep the number of messages to three or four and use a few bullet points to illustrate or enhance each message. Repeat important themes. This approach will make your messages stronger through *repetition* and *consistency*. Most people need to see a message about seven times before they will take action.

Your key messages should include all of the important points about your service or product—which, in this case, is PD services.

Key messages should:

- Attract attention and interest.
- Generate an emotional response.
- Inspire action or connection.

Consistent and focused messages allow you to respond to the needs of your audiences and create a “buzz” about your services or programs.

Key messages should focus on:

- Educating and informing.
- Explaining benefits.
- Creating an image.

Key messages can be added to promotional materials to help frame an issue and compel target audiences to act (see the Whole School, Whole Child, Whole Community example).

Key Messages



Key messages must be focused and clear. They must speak to the interests and needs of your target audiences. Carefully crafted messages will make the target audience want to find out more, and ultimately take action.

**Generates
an emotional
response**



**Attracts
attention
and interest**



EXAMPLE

Key Messages for a Whole School, Whole Community, Whole Child Workshop



Message 1

Topic: Students' ability to learn.

Audience: Teachers.

Key message: Students in your class are facing life challenges that affect their ability to learn. Supporting students in every area of life is critical to helping them succeed in your classroom.

Call to action: Learn how using the Whole School, Whole Community, Whole Child model in your classroom can help students be healthy and succeed. Sign up for a 1-day workshop.

Message 2

Topic: Students' ability to learn.

Audience: School administrators.

Key message: Want to improve standardized test scores? Consider classroom physical activity breaks. Research has shown that active and healthy students learn better.

Call to action: Learn how using the Whole School, Whole Community, Whole Child model in your district can improve student performance by creating a healthy and supportive school environment. Sign up for a 1-day workshop.

Use Data

You should use data in your key messages, but choose data that are relevant to the experience and perspective of the target audience. For example, if your audience includes parents, use data on the financial effect of obesity on a child as he or she grows up or the average number of school days missed by a child with asthma. More general data about the overall cost of obesity to the US health care system or the number of children with obesity at national, state, or even local levels may not be personal enough to connect with a parent.

For school district administrators, consider data from the district level. For principals, look for data at the school level, and for teachers, look for data at the classroom level.

Pretest Messages and Materials

Key messages should be shared first with a sample of the target audience to make sure your messages are understood and effective. Pretesting is an important quality control step that should be done before you go through the time and expense of developing promotional materials.

Specifically, pretesting can help you:

- Select message themes and the appropriate style, format, spokesperson, and type of appeal (e.g., fear, humor, compassion).
- Choose the appropriate layout and design for your materials.
- Refine wording and images.
- Make revisions before spending time and money on the finished product.

Pretesting methods include:

- Focus groups.
- Individual interviews.
- Questionnaires.

Select the pretesting method that best fits your needs, resources, and audiences. You can base this decision on the type of feedback you need, the amount of time you have, the types of materials you are developing, and your budget.

Create a Timeline

Your objectives, milestones, and benchmarks should be realistic and time-sensitive, and they should be set up at the beginning of the planning stage. Think about your promotional efforts as a journey, not a destination. Although you may conduct your outreach activities on specific days, your overall promotional efforts should be a continuous process across the life cycle of your program.

As you develop your timeline, try to think in terms of your audience's perspective. For example:

- What are their priorities?
- When are they most likely to need your services?
- When is a good time to reach them?
- What dates should you avoid for outreach or training events?
- How can you consistently reach out to your audience over time with information about your services?

Use a calendar to create a working timeline of outreach opportunities throughout the year. Your timeline should include the following:

- Time for internal communications and preparations for promoting your PD services.
- Specific outreach steps you will take.
- Major events to plan for or promote.
- Critical dates for your target audiences that could affect your efforts.
- Time for developing and producing your promotional materials.



Identify Measures of Success

Without a thoughtful evaluation strategy, you have no way of knowing if your promotional plan is working or whether you need to make adjustments. Knowing the effect of your outreach activities and refining the areas that need improvement will help you reach the outcomes you want.

When you wrote your SMART objectives at the beginning of the planning stage, you made sure they were measurable. That's a great place to start when you evaluate your outreach efforts.

Measurable objectives:

- Provide an indication of how much change you expect to happen.
- Make it possible to count or document change so you know whether the objective has been achieved.

For example:

By the end of the workshop on how to use CDC's School Health Index: Self-Assessment and Planning Guide, 75% of participants will say that they heard about the workshop through our promotional efforts.

This objective can be measured by tracking the number of people who clicked the "Register for this training" link in your promotional e-mail. It could also be measured by asking participants how they heard about the workshop during the workshop itself.

Recruit Partners Who Can Support Your Plan and Help You Achieve Your Objectives

Promotional efforts are often considered the most effective when word begins to spread among your audiences on its own. You'll know you've succeeded when your audience has become so convinced of the value of your PD services that participants are bringing their colleagues to your PD events. Making information "contagious" among your target audiences means involving key partners. Look for people within your sphere of professional influence that you can reach out to for help. For example:

- Decision makers have the authority and power to "endorse" your PD services so that your audiences will listen.
- People who have participated in past trainings and found them useful will be great partners in spreading the word about the benefits of your PD services.
- Influential professional groups, such as a state chapter of health or physical education professionals, can be a persuasive force in promoting your PD services.



Use Figure 2 to spark ideas about partners you can reach out to as part of your promotional efforts. You may also know of other influential partners you can ask to help spread your message. Consider various ways to include their endorsement or trusted voice in your promotional activities.

Figure 2. Potential Partners





Ideally, you will have access to marketing and graphic design professionals within your organization. However, sometimes you may need additional help or creative expertise. Outside consultants—especially those who have expertise in marketing communication or design—can help you promote your PD services.

Using a consultant can:

- Ensure objectivity and eliminate internal politics.
- Allow you to take advantage of professional experience without adding to your permanent overhead.
- Meet a temporary need.
- Add expertise to your organization.
- Provide support to your existing staff.
- Help you launch new products into new markets or channels.
- Give you a new perspective or a new way to tackle a problem.

Step 3. Implement Your Plan

You've developed SMART objectives that describe the results you want to achieve, developed and pretested messages with target audiences, created a timeline, identified measures of success, and recruited strategic partners who can help you achieve your objectives. So what's next?

Your messages need to be communicated in a compelling and convincing way. You should use different outreach strategies to get your messages out frequently and in multiple ways. These strategies include advertising (paid placement of ads), public relations, special events, and "collateral" or supporting materials (informational and promotional).

Use your SMART objectives and timeline to guide your outreach activities or promotional campaigns. This section will help you decide which outreach strategies to use to implement your promotional plan.

Identify Your Resources

Before you can promote your PD services, you have to assess your financial, human, and environmental resources. You will need money to advertise your services, print brochures, and produce promotional items. Human resources, in this context, include staff and partners who can support or participate in your outreach activities. Environmental resources include meeting spaces and items such as tables, chairs, and audiovisual equipment.

Identify the Elements of Your Outreach Strategy

A Marketing Wheel can help you select specific strategies for your outreach efforts. The strategies in your wheel should reflect what makes sense for promoting your program, taking into account your resources and the target audiences you want to reach. The strategies listed in the Marketing Wheel in Figure 3 are described in more detail in this section.

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Figure 3. Outreach Strategies

What outreach strategies will you use to communicate your messages in a compelling and convincing way?



Needs Assessment

As noted previously, a thorough needs assessment will give you the information you need to effectively communicate your messages. The data you collect provide a foundation to help you develop a promotional plan that will support your program goal(s). Needs assessments allow you to connect with your audience, which is also a good outreach strategy. Your needs assessment is an opportunity to remind your target audiences that you are available to them and can provide services that are tailored to their needs.

Presentations

One way to reach your target audiences is to attend meetings where they will be and ask for time on the agenda to share information about your programs and services. Remember to bring materials that use key messages that your target audiences will respond to.



Strategic Alliances

Building strong relationships helps you create buzz about your PD services. Think about who and what you need to create awareness and move people to action. See the discussion of partnerships in Step 2 on page 16.

How to Use Your Promotional Materials

- Create materials to inform, educate, and invite action or participation.
- Send to people who request more information or as a way to keep in touch.
- Bring to appointments and meetings.
- Post on a website.
- Display in your office and encourage visitors to take copies.

Event Outreach

Event outreach gives you a unique opportunity to connect with your target audiences in person. Find out about events that your audiences attend and consider participating as an exhibitor, panelist, speaker, or partner. Your agency or organization can also become “street marketers,” distributing promotional items and messages to participants outside of an event. Contact event planners to find out how you can participate.

Motion Media

Think about using a smart phone to capture video or photographs at one of your PD events. Put these images on your social media sites, like Facebook, Twitter, Instagram, or YouTube.

Collateral and Promotional Items

Collateral and promotional items are a collection of materials used to support the promotion of a service or product. These materials are intended to make your communication efforts eye-catching, fun, and more effective. Your organization’s logo and “look and feel” should be clear on these materials. Examples of these materials include the following:

- Informational brochures.
- Postcards.
- Letters.
- Posters, signs, and banners.
- Visual aids used in presentations, like PowerPoint slides.
- Web content.
- Fact sheets.
- Newsletters.
- Gear items—like stress balls, highlighters, or key chains—branded with a logo, phone number, or website address.

Paid Advertising

Advertising is paid media, while public relations is earned. Ads in newspapers or magazines or on television cost money, and this type of advertising guarantees the placement of your message. Information released through public relations can be replaced at any time with breaking news or information that is considered more important.

Web and Internet

The web continues to grow as an important way to reach target audiences. If you have a website, use it as a strategic tool for sharing current information. Many organizations also have intranet sites that can be used to reach internal audiences that can advocate for and promote your organization's efforts.

Social Media

You can use social networking services like Facebook and Twitter to communicate information about what your agency or organization is doing, invite people to attend PD events, and share resources.

Public Relations

Public relations includes everything that advertising does not, from a letter to the editor of your local newspaper to a presentation to a target audience. Get to know editors and reporters who work in your area or cover your field. These relationships can give you an advantage when pitching a story idea or reacting to a news article.

Identify Key Messages

Once you've selected specific strategies for each outreach activity, add the key messages you developed for each of your audience segments in Step 2. Identify the message that fits best with the target audience, the strategy chosen, and your specific call to action. Keep your messages short and focused on what meets your audiences' needs.



Communication Tips



Focus: Focus your message on the benefits to your target audiences.

Message: Provide enough information to captivate, persuade, and lead to action.

Design: Create an appealing “look” and “personality” for your materials. A good first impression goes a long way to getting attention and generating interest. Your materials should be well-designed and easy to read.

Credibility: Testimonials, case studies, correct grammar, and typo-free content make your materials more credible. Credibility helps build relationships.



Brand Your Materials

Your materials will send a specific message about your agency or organization’s brand and “personality.” Your brand is a consistent promise about your services that you communicate to your clients. Branding includes everything from fonts and colors to logos and taglines. Your organization likely has branding requirements that include when and how to use your logo. Be sure to follow these requirements in all of your promotional materials.

The personality of your message is reflected in the type of language you use with your target audiences. For example, your messages can be:

- **Friendly and inviting**—to encourage members of School Wellness Teams to attend your workshops or register for your online courses.
- **Professional**—to communicate to school superintendents that your PD services are valuable.
- **Provocative**—to catch the attention of teachers working in alternative or nontraditional high schools.
- **Motivating**—to appeal to physical education teachers through the use of active verbs.

Choose a personality that communicates respect for your audiences and invites their interest and participation.

Look for Ways to Get Attention

How many promotional and advertising messages do you think people are exposed to every day? The surprising answer is 5,000. These messages come from multiple sources—including billboards, buses, television, cable, radio, the Internet, social media, signs, overheard conversations, word of mouth, e-mail, and newsletters. And all of these messages are suggesting something that you should buy or do.

Out of those 5,000 messages, on average, a person can only pay attention to about 100. Think about what you need to do to make your message stand out from all of that information. You can't expect people to just notice. You have to be strategic and innovative to be seen and heard.

People remember things best when their senses are engaged—when they see, hear, and are stimulated to think about something. The human brain processes information in a certain way, and from a marketing perspective, you can help that process along by using “brain grabbers,” such as emotion, color, photographs, illustrations, humor, or novelty (an unusual perspective or way of looking at something).



**Brain Grabbers
Help Engage
People's Senses**

Emotion

Color

Photographs

Illustrations

Humor

Novelty

Step 4. Collect Evaluation Data to Assess Your Plan and Guide Any Changes

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Evaluate Your Efforts

Have you ever wondered if the money you spent on producing creative promotional items for your PD services paid off? Did your online strategy reach your audiences? Do your target audiences perceive your organization the way you want them to? Evaluation can help you answer these questions and more.

Evaluation improves the effectiveness of your promotional efforts.

Knowing the effect of your outreach activities and refining the areas that need improvement will help you reach the objectives in your promotional plan.

Evaluation can help you effectively engage with your audience. Evaluation is key to helping you identify and connect with your audiences and ensure that your messages are resonating with them. Even if you tested your key messages already, as outlined in Step 2, the needs of your audience and the messages that will appeal to them may change over time. By evaluating your efforts throughout the implementation process, you can identify ways to collect feedback from your audiences and learn how they are responding to your messages.

Situations change, and your strategies may need to change as well.

You are likely to face unexpected events, opportunities, and threats that affect your promotional efforts. Evaluation helps you collect valuable information at these critical moments so you can make adjustments. It can also help you determine whether the changes you make are putting you back on the path to success.

Evaluation helps you allocate resources wisely.

Everyone works with limited human and financial resources. Evaluation can help determine whether your investments could be distributed more effectively to achieve your desired results.

Review Step 2

In Step 2 of this guide, you identified measures of success. These measures are an ideal starting point for thinking about your evaluation strategy in more detail. In addition, when you wrote your SMART objectives at the beginning of the planning stage, you made sure they were measurable. That's a good place to start when you evaluate your outreach efforts. Measurable objectives:

- Provide an indication of how much change you expect to happen.
- Make it possible to count or document change so you know whether the objective has been achieved.

In the following example, the measurement or evaluation component is the percentage of participants:

By the end of the workshop on how to use CDC's School Health Index: Self-Assessment and Planning Guide, 75% of participants will say that they heard about the workshop through our promotional efforts.

Evaluate Your Strategies

You can evaluate the success of your objectives by using data collected from various sources. For example, you can count the number of registration clicks for an online course. You can survey participants of workshops and information sessions. If you used a variety of outreach strategies in Step 3 to promote these PD events to your target audiences, then you will have a variety of potential data sources that might be useful to track.

Data on each of your strategies can help you shape and refine future strategies, monitor progress, and make corrections during implementation. The idea is to prepare upfront and then evaluate as you go along, so you can adjust your strategies as needed to ensure success.

Make sure that the data sources you choose can provide the information you need to show whether your objectives from Step 2 and your strategies from Step 3 are helping you meet your goals.

About Assessment



No one wants to travel a long distance, spend a lot of money, and somehow end up in the wrong place. Evaluating your promotional efforts along the way can help you stay on course and reach your destination.

Evaluating every part of your work can be hard. If you have a comprehensive promotional plan, choose the elements that are most critical to its success. Or choose a strategy that your organization hasn't used before so you can get data to show whether it works.

Consider the following questions as you plan your evaluation:

- How will you collect baseline data?
- How will you collect outcome data?
- Where will you keep the data so that each team member can contribute information as it's collected?
- How often will you review the data to determine if you need to adjust your outreach strategies?
- How will you share your data?

Depending on the sources you choose, you can assess the following components of your promotional efforts to help you evaluate how successful they were:

- **Message dissemination:** How well did your key stakeholders (like teachers) share your messages with others?
- **Public relations:** Did you build strong relationships with your target audiences, internal team, and key allies and stakeholders?
- **The quality of communication exchanges with your audience:** How satisfied were your target audiences with the direct communications they received from your staff or team members?
- **Print, online, and other communications:** What materials and services (like newsletters, presentations, webinars, brochures, or e-mails) did you use to support and reinforce your messages?

Choose Your Evaluation Method

You can choose from a variety of evaluation methods. Examples of these methods include the following:

Interviews

Interviewing consists of selecting a small group of people who represent your audience and asking them targeted yet open-ended questions. This approach will give you better insight into how people are responding to your promotional activities.

Focus Groups

You may want to bring together a group of people from your audience to test new messages or to have a directed group discussion about your promotional activities. Unlike interviews, focus groups are moderated by a facilitator and allow people to bounce ideas off one another, which can help build a stronger set of data.

Surveys

You can use simple and inexpensive technology to conduct an online survey that consists mainly of multiple choice questions. Although you may be able to ask some open-ended questions, surveys work best when they use "checkbox" answers to collect quantitative data. Surveys can also be conducted in person, allowing you to observe the respondent and gather additional data based on his or her reactions to the questions.

Quantitative Data Collection

Websites, blogs, and other forms of social media allow you to collect useful data. For example, on a website, you can track the number of daily or monthly visitors, downloads, and page views. For blogs and social networking services (like Facebook or Twitter), you can track the number of subscribers and the number of comments left by visitors.

Promotional Item Distribution Tracking

You can track the reach of your promotional items by counting how many items you have distributed by mail, through e-mails, and at meetings or conferences. This information does not assess the value of your promotional materials, but it does show the level of reach and effort made to contact your target audiences.

HTML E-Mail Response Rates

Most HTML e-mail providers collect data on the numbers of e-mails sent, the percentage opened by recipients, the number of messages forwarded or shared with others, and the number of website links or downloads clicked on by each recipient. These data, which can be separated by individual recipient, show you what types of e-mails get noticed and forwarded. They can also provide insight into what specific information within an e-mail was perceived as most valuable to recipients.

Action Research

You can change the messaging or timing of your outreach strategies to see which approach generates the most significant response from your target audience. For example, to promote a webinar, write four different subject lines for your e-mail invitation. Choose a different style for each subject line—such as informational or provocative. Send these e-mails to a test group of your target audience. Using the response rate data from your HTML e-mail provider, see which subject line generated the highest “open” and “click” rates from the test group. Use this version to send your official webinar invitation to the entire target audience.

Share Your Data

The evaluation data you collect will help you know how to improve future promotional efforts. You may also consider sharing your findings with your funders and agency or organization administrators, which can help you to:

- Show the results of your program.
- Build support for future program activities and improvements.
- Build support for continued or expanded program funding.

You can share evaluation results with your key allies and stakeholders in many different ways. For example, detailed reports are appropriate for internal program staff, agency administrators, contractors, and funding agencies. For external audiences, the best approach is a brief, clearly written report that presents your primary evaluation findings and explains how these findings will be used to improve your program. Tailor the type and amount of information to the specific audience.



Conclusion

We hope the information, resources, and examples in this guide will help make your efforts to promote your PD services easier and more successful. Effective promotional activities will help you reach the right audiences and motivate them to request your PD services or attend your events. This guide provides you with the skills to:

- Identify the four steps for promoting PD services.
- Develop a promotional plan that meets the needs of your target audiences.

We also hope the simplified steps in this guide will help you promote your PD services in a systematic and creative way. You should always make data-driven decisions as you update your messages and strategies to keep the attention of your audience. Needs assessments and continuous evaluation of your objectives and strategies will give you the data you need to be successful.

If you ever feel stuck, pay attention to the promotional messages that grab your eye. Why did you look? What did you notice? Why did you care about the message or product? Take these answers and return to your own promotional plan. This information can help you add new and creative ideas to your plan and help you reach your goals.

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