



WORKBOOK

Employment  
Network  
**Guide To  
Marketing**

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## USING THE WORKSHEETS

You can type directly in this PDF wherever a worksheet provides a place for you to insert your own information and ideas.

# WORKSHEET 1

## AUDIENCE IDENTIFICATION

Identifying your audience(s) is a key step in developing your marketing plan. You must have first defined the purpose for your marketing efforts before you can decide which people or organizations can help you achieve your goals. This is important to knowing how to structure your organization and how to target your messaging. Consider the following:

- Who are you trying to reach?
- Who can help you reach your audience?
- Who can help you accomplish your goals?
- Who can help you communicate about your EN?
- Who can you collaborate with to serve your clients?
- Who can you learn from or educate to help you improve or expand your services?

This worksheet provides a framework to help you identify and segment your audience(s), target specific audiences within a segment, prioritize targets, and identify what they need so that you can address what they care about.

### STEPS:

1. Consider the **purpose** of your marketing plan. Examples may include:

- Increase clients.
- Build awareness of your EN and your services.
- Find jobs for your clients.

If it's all three, you may have several audience segments which you can then break down into specific people, organizations, or businesses to target.

2. **Segment:** Refer to your marketing purpose to divide your overall market into distinct audiences.

Examples:

**PURPOSE:** Increase clients

**SEGMENT:** Individuals receiving SSDI benefits or SSI payments

**PURPOSE:** Build awareness of your EN and your services

**SEGMENT:** Organizations serving common customers

**PURPOSE:** Find jobs for your clients

**SEGMENT:** Employer groups/businesses

3. **Target:** Identify specific audience groups to target within the segment to focus your marketing efforts on.
4. **Prioritize:** From your target audience, define your primary and secondary target audiences. Where do you want to focus your attention? Is it beneficiaries, influencers (family members, teachers, physicians, etc.), individuals with previous work experience, related organizations, etc.
5. **Position:** Identify what the audience needs help with that your EN can provide. This will help you create marketing materials and messages that address these needs and are likely to appeal to your targeted audience.

**EXAMPLES:**

<p><b>PURPOSE:</b> Increase clients  <b>SEGMENT:</b> Individuals receiving SSDI benefits or SSI payments</p>			
TARGET	PRIMARY	SECONDARY (Influencers)	POSITIONING (Address needs of this audience)
Young adults receiving Social Security Disability Benefits	Recent high school graduates Vocational school students or recent graduates College students or recent graduates	Parents Teachers Peers Youth organizations VR Counselors	Address fears that working full time leads to loss of benefits. Provide access to available jobs and employers. Provide access to job training. Assist with reasonable accommodations.

<p><b>PURPOSE:</b> Build awareness of your EN and your services  <b>SEGMENT:</b> Organizations serving common customers</p>			
TARGET	PRIMARY	SECONDARY (Influencers)	POSITIONING (Address needs of this audience)
State Vocational Rehabilitation (VR) Agency	VR Leadership Designated Ticket to Work Coordinators VR Counselors	Professional organizations <ul style="list-style-type: none"> <li>• National or state rehabilitation association members</li> <li>• Council of State Administrators of VR</li> </ul>	Provide long term employment success for Ticketholders. Help Ticketholders attain and maintain SGA wages to generate Cost Reimbursement for VR. Help to keep Ticketholders from returning to VR for services.

<b>PURPOSE:</b> Find jobs for your clients <b>SEGMENT:</b> Employer groups/businesses			
TARGET	PRIMARY	SECONDARY (Influencers)	POSITIONING (Address needs of this audience)
National Employers providing local jobs	COSTCO CVS Starbucks Home Depot	Chamber of Commerce Local Workforce agency Society for Human Resource Management (SHRM)	Provide dedicated and dependable employees. Provide disability awareness education and support. Solve workplace issues with employees. Provide technical assistance for providing accommodations.

Use this framework to further segment and target your various audiences, prioritize them, and identify what they need. This will help you target your messaging and create marketing materials that are likely to appeal to your audiences.

<b>PURPOSE:</b> <b>SEGMENT:</b>			
TARGET	PRIMARY	SECONDARY (Influencers)	POSITIONING (Address needs of this audience)

<b>PURPOSE:</b> <b>SEGMENT:</b>			
TARGET	PRIMARY	SECONDARY (Influencers)	POSITIONING (Address needs of this audience)

# WORKSHEET 2

## SITUATIONAL ANALYSIS

### Strengths, Weaknesses, Opportunities and Threats (SWOT)

A SWOT analysis is a popular method for conducting a situational analysis to collect, evaluate, and organize information about an organization's internal and external environments. The SWOT analysis will help you identify your organization's Strengths, Weaknesses, Opportunities and Threats related to your marketing goals and inform your decisions as you plan and implement marketing initiatives.

### STEPS TO CONDUCTING A SWOT ANALYSIS

#### 1. Choose participants and a facilitator.

Decide whose responsibility it is to both facilitate and complete the SWOT analysis for your Employment Network. To provide a comprehensive perspective, involve a variety of team members from your organization. For smaller ENs, you can choose people with specific expertise who know your organization.

#### 2. Brainstorm.

Generate ideas first by analyzing your organization through an open discussion. Try to categorize each topic to help create general lists for each section, and label them accordingly. Consider things like innovation, leadership, stakeholder relationships, staff qualifications/talent and quality of services. Don't hesitate to identify shortcomings. Keep track of all suggestions. Examples of questions about your organization that can promote discussion include:

- What are your best qualities or specialties?
- What achievements do you have?
- What is the need for your services?
- Are there similarly situated organizations to collaborate with?
- Do you know people at your State VR Agency, Work Incentives Planning and Assistance (WIPA) project or Social Security Field Office?
- Do you have a positive reputation in the community?
- Does your team have expertise in areas such as work incentives, assistive technology, or disability types?
- Do you have access to employers with a history of hiring, retaining and promoting people with disabilities?
- Internally, what makes it challenging to achieve goals?
- What are you lacking in resources, technology, or people?
- What external factors can influence the success of your clients or EN business?
- Do you have staff available to plan and conduct marketing activities?
- Do you have a marketing budget?
- Are there funding or policy changes that will influence your future services?
- Do other organizations compete with you?

### 3. Identify the Strengths, Weaknesses, Opportunities and Threats.

Review your notes from your brainstorming session, and start looking at each section individually. Start with the Strengths section to identify the organization's greatest strengths. Develop these ideas further, then record them in the SWOT matrix below. Keep it simple to help you focus on your EN's priorities. Repeat this for Weaknesses, Opportunities and Threats.

<b>SWOT ANALYSIS</b>
<b>STRENGTHS</b>
<b>OPPORTUNITIES</b>
<b>WEAKNESSES</b>
<b>THREATS</b>

### 4. Review and Finalize.

Complete each section of the SWOT analysis and review it as a team to ensure it's accurate. Create a final document that everyone can easily understand and refer to when developing marketing strategy. Use the SWOT analysis as a guide for future decision-making and addressing pending environmental changes.

Revisit your SWOT analysis regularly to account for internal and external changes over time.

# WORKSHEET 3

## SITUATIONAL ANALYSIS

### Strengths, Opportunities, Aspirations, Results (SOAR)

SOAR is a planning instrument that allows an organization to focus on current strengths and to project its vision for the future. SOAR complements SWOT (Strengths, Weaknesses, Opportunities, and Threats) approaches by focusing on the organization or issue, enhancing what is currently done well, and imagining how to move forward.

### SOAR FRAMING QUESTIONS

- **Strengths:** What is working well? What are we proud of? What are our assets, capabilities, and best accomplishments?
- 5. **Opportunities:** What external circumstances or challenges can we reframe in a way to create potential for action? What challenges can be seen as opportunities? What new skills do we need to move forward?
- **Aspirations:** What is our preferred future? What strategic initiatives would support our aspirations?
- **Results:** How do we know we are succeeding? What indicators will allow us to measure progress toward achieving our goals? What resources do we need?

### STEPS TO IMPLEMENTING SOAR AT THE ORGANIZATIONAL LEVEL

1. Identify organizational stakeholders from all levels of the organization and what the planning sessions will entail.
2. Determine what questions will be used to gather different perspectives from key stakeholders (create an interview protocol).
3. Engage internal and external stakeholders to determine what conditions led to the greatest success in the past. Focus on generating untapped potential and possibilities.
4. Focus on “what we want” instead of “what we don’t want.” This will reframe threats and weaknesses to focus more on “where we are going.”
5. Determine the unique strengths of the organization. What are its best qualities – resources, capabilities, environment and plusses?
6. Determine the results you want to see and aspirations for the future. This is your vision for the future, and it should inspire and challenge your efforts.
7. Prioritize opportunities with the most potential for success and impact.
8. Determine goals for opportunities to be addressed and identify what measures you will use to track success toward that goal.
9. Create an action plan for implementing goals.



**SOAR ACTION PLANNING GOAL****STRENGTHS**

What are your current strengths pertaining to this goal?

How can these strengths be leveraged to enhance your goal?

**OPPORTUNITIES**

What resources are available for progressing toward your goal?

Internal:

External:

**ASPIRATIONS**

Where do you see your goal/outcome in 5 years? What helped to achieve it?

**RESULTS**

What strategies would support improved implementation of your goal?

What would indicate that you are on the right track to achieving your goal?

**CONSIDER THESE QUESTIONS:**

1. What strategies are you interested in pursuing over a one-month, three-month, and six-month timeframe?
2. What is your capacity to work on these strategies? (Consider staffing, funding, evaluation, training needs)
3. Who needs to be involved in this initiative (organizations/people)? What roles will they play?
4. What actions will your organization take?
5. How will you know when you are successful? (Indicators of success)

# WORKSHEET 4

## BRAND IDENTITY CHECKLIST

Your brand identity is a set of visual and verbal/written elements that communicate your EN's unique personality, values, and purpose. Building a positive, cohesive brand identity relies on the research you use to develop your mission, i.e., your organization's purpose, goals, audiences, and messaging.

Use this checklist to help you establish and maintain consistency in your brand identity:

- ✓ **Mission Statement:** Write a strong mission statement that sets the stage for developing your brand identity. Your mission statement should capture the essence of what you do. It should communicate your purpose to your key audiences and the public.
- ✓ **Value Proposition:** Capture the specific services and supports your EN offers, differentiate your organization from others and explain why your key audiences should choose to work with you.
- ✓ **Goals and Objectives:** Establish goals and objectives that relate directly to your mission and purpose.
- ✓ **Messaging:** Craft compelling messages that have a consistent tone and writing style that speak directly to the needs of your audience. Address what you want your audience to do, how they can start and how they can reach you.

### VISUAL IDENTITY

The visual elements of a brand include your logo, color palette, fonts, icons, and design style that you use consistently to distinguish your brand.

- ✓ **Logo:** A unique logo is your primary identity and captures your brand essence. It may consist of the organization name only or include a symbol.
- ✓ **Color Palette:** Select a set of colors that you use consistently on all materials. Include the colors in your logo, plus additional colors to make a complete palette.
- ✓ **Fonts:** Choose one or two font families that include varying weights that you use consistently on all materials. Font(s) used in your logo may be included or not.
- ✓ **Icons:** If using icons, they should be created using your brand color palette. These may include a set of social media icons.
- ✓ **Design Style:** This is the overall look, feel and tone of your brand and applies to all items above.

## CONSISTENCY

Ensure all marketing activities and content consistently reflect your established brand image and identity. Examples include:

- ✓ Website design
- ✓ Social media graphics
- ✓ Email templates and signatures
- ✓ Newsletters
- ✓ Event materials
- ✓ Media kits
- ✓ Print materials
- ✓ Presentation template(s)
- ✓ Signage
- ✓ Digital flyers, fact sheets, ads

## TICKET TO WORK PROGRAM BRANDING

Along with your own brand elements, use sample Ticket Program language, graphics, logos, banners, and flyers to demonstrate that you are a part of the official network of providers. Use this content and be sure to follow the Brand Guidelines to make your website and other promotional materials consistent with the official program branding and websites: [yourtickettowork.ssa.gov/resources/service-provider-outreach-toolkit/marketing-materials](https://yourtickettowork.ssa.gov/resources/service-provider-outreach-toolkit/marketing-materials).

## BRANDING GUIDE

You may want to develop your own branding guide to detail your brand identity, along with rules and guidelines for any public-facing communication. The guide would include logo use, font type and color standards, writing tone, your mission statement and key messaging.

## ACCESSIBILITY

Ensure all marketing content is accessible to individuals with disabilities per the information and communication technology requirements covered by [Section 508 of the Rehabilitation Act](#).

## EVALUATION

Brand identity evaluation and maintenance is an ongoing effort. Regularly revisit your marketing brand elements to evaluate effectiveness and make necessary updates to reflect new opportunities, shifting resources or market changes.

# WORKSHEET 5

## MISSION STATEMENT

Your mission statement should be meaningful to your team members and the individuals you serve. It should communicate your purpose to your key audiences and the public. Your mission statement is the cornerstone that defines your organization's identity, values and decision-making.

*Your mission statement should capture the essence of what you do.*

A typical mission statement includes one or two sentences and contains three key elements: the purpose (what), the method (how) and the target audience (who). Generally, mission statements are relatively short because it makes them easier for your audience to read and understand. Consider these three elements:

- **Purpose - What are you trying to achieve?** Draft a statement that summarizes what your organization hopes to achieve for your audience. Consider the strengths and opportunities you identified by completing a situational analysis.
- **Target audience - Who are you speaking to?** Define your ideal customer or target audience and draft a mission statement that resonates with that audience.
- **Method - How will you achieve the purpose?** Draft a statement that includes how your organization will accomplish the purpose for your target audience.

## GATHER IDEAS

You can look at mission statements from other Employment Networks or similar organizations serving individuals with disabilities. Here are four examples of mission statements from ENs with the target audience (who), purpose (what) and method (how), outlined in a chart.

1. ABC EN matches people with disabilities to real jobs, then provides the support and services needed to ensure success for both the employee and employer.

<b>PURPOSE</b>	Ensure success for both the employee and employer
<b>TARGET AUDIENCE</b>	People with disabilities
<b>METHOD</b>	Matches to real jobs, then provides the support and services needed

2. Our mission is to improve the earnings potential of those in the Ticket to Work Program through employment initiatives that lead to economic growth and an improved quality of life.

<b>PURPOSE</b>
Improve earnings potential, economic growth and an improved quality of life
<b>TARGET AUDIENCE</b>
Those in the Ticket to Work Program
<b>METHOD</b>
Employment initiatives

3. Our Employment Network practices and promotes innovative services to advance employment opportunities, personal choices, and financial independence of individuals with disabilities.

<b>PURPOSE</b>
Advance employment opportunities, personal choices, and financial independence
<b>TARGET AUDIENCE</b>
Individuals with disabilities
<b>METHOD</b>
Practices and promotes innovative services

4. We offer and promote programs to empower people with disabilities to achieve employment and independent lifestyles within the community.

<b>PURPOSE</b>
Achieve employment and independent lifestyles within the community
<b>TARGET AUDIENCE</b>
People with disabilities
<b>METHOD</b>
Offer and promote programs to empower

## GET STARTED

Use the template below to create a new mission statement or revise an existing one. The template will help you organize and list the various components to include in your mission statement.

Work on it yourself or invite other internal stakeholders to work on it with you. Consider your key audience and situational analysis.

## TEMPLATE

[Company name]'s mission is to [what - purpose] for [who - target audience] by [how - method].

Begin to outline the components into sentence format. After you've done this, start to shorten your notes and words into a statement. Use active and descriptive language to convey your mission. It helps to create more than one option.

Once you've completed your first draft(s), invite feedback to help make your mission statement concise and coherent.

<b>COMPANY NAME</b>
<b>PURPOSE (WHAT)</b>
<b>TARGET AUDIENCE (WHO)</b>
<b>METHOD (HOW)</b>
<b>MISSION STATEMENT OPTIONS</b>

## NEXT STEPS

1. Share the sample mission statement(s) with colleagues and other internal stakeholders.
2. Ask them to give the statement a 1-5 rating (1 = poor; 5 = excellent) in each of the following areas: clarity, audience, alignment with purpose and strengths, and method. Ask them to provide any additional feedback.
3. Consider the feedback and whether the draft mission statement truly reflects your organization's purpose and strengths. Is the statement simple, brief, inspirational and meaningful? If not, what words could you revise to make it more accurate?
4. Continue to tweak and improve your mission statement for clarity and alignment with your organization's identity, purpose and strengths. Ensure it captures the essence of what you do.

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Drafting and editing your mission statement may take a bit of time, but since your organization may use the statement for a variety of purposes like seeking partners and funders, it's worth taking the time to ensure the wording is ideal.

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# WORKSHEET 6

## VALUE PROPOSITION

Your value proposition captures the specific services and supports your EN offers. It should differentiate your organization from others, be persuasive, and explain why your key audiences should choose to work with you. Your value proposition explains what sets you apart from other organizations.

Examples could be that you deliver positive outcomes and meaningful careers for individuals with disabilities, or that you provide specialized expertise, such as excellence in serving certain disability types.

The components of a Value Proposition should include your:

- **Audience:** Who's your ideal customer/target audience?
- **Offering:** What do you offer that solves a problem for your ideal customer/audience?
- **Value:** What benefits from your offering matter most to your customers?
- **Differentiator:** Why should the customer trust you over someone else?

## GATHER IDEAS

You can look at value propositions from other Employment Networks or similar organizations serving individuals with disabilities. Here are some examples from ENs:

### Example 1

ABC EN's 25 years of experience in disability benefits, health care, employment, and Social Security Work Incentives helps thousands of individuals with disabilities become employed and maintain access to needed benefits as they pursue self-sufficiency.

AUDIENCE	OFFERING	VALUE	DIFFERENTIATOR
Individuals with disabilities receiving benefits	Support with employment, disability benefits, health care coverage, and the use of Social Security Work Incentives	Maintaining access to needed benefits, eased fears of working and future self-sufficiency	Long-term experience, trustworthiness, thousands of customers



**Example 2**

Hundreds of national employers seeking to hire individuals with disabilities count on ABC EN to find the right candidates. If you have a disability, count on us to help you find the ideal job match.

AUDIENCE	OFFERING	VALUE	DIFFERENTIATOR
Individuals with disabilities	Ideal job match	Employers seeking to hire candidates with disabilities	Relationships with hundreds of national employers

**Example 3**

Your Social Security Disability Insurance (SSDI) includes Ticket to Work, a program that supports going back to work. With decades of expertise, we help customers get all they can from SSDI and Ticket to Work.

AUDIENCE	OFFERING	VALUE	DIFFERENTIATOR
Beneficiaries of SSDI	Support to go back to work	Free Ticket to Work services	Decades of expertise

**Example 4**

Our retail stores and community partnerships provide pathways for local people who are underserved or disadvantaged to build job skills that lead to sustained employment and improved financial stability.

AUDIENCE	OFFERING	VALUE	DIFFERENTIATOR
Local people who are underserved or disadvantaged	Help to build job skills	Sustained employment and improved financial stability	Relationships with retail stores, community partnerships

## GET STARTED

Begin by brainstorming ideas for your value proposition. Remember to address the following four components:

### 1. Audience – think specifically about who you serve (examples):

- ✓ Age
- ✓ Disability
- ✓ Economic status
- ✓ Education level
- ✓ Geographic location

### 2. Offering – think specifically about what you do (examples):

- ✓ Ease fears of employment
- ✓ Match candidates with jobs
- ✓ Train and mentor
- ✓ Support employers
- ✓ Provide on-the-job training and support
- ✓ Job Coaching

### 3. Value/problem you solve (examples):

- ✓ Improve financial stability for target audience(s).
- ✓ Increase available candidates for specific job market (examples):
- ✓ Assist with specific philanthropic effort(s).
- ✓ Decrease poverty with specific population.
- ✓ Increase in geographic areas served.
- ✓ Increase community participation for target audience(s).

### 4. Differentiator/what sets you apart (examples):

- ✓ Location(s)
- ✓ Level of experience
- ✓ Partnerships and affiliations
- ✓ Funding sources
- ✓ Specific track record of accomplishment.

Use the following chart to organize and list the various components for your value proposition.

AUDIENCE	OFFERING	VALUE	DIFFERENTIATOR

Begin to outline the four value proposition components into sentence format. After you've done this, start to shorten your notes and words into a statement. Use active and descriptive language to convey your value.

Once you've completed a first draft (or have a couple of options), get some feedback to help make your value proposition more concise and coherent.

#### SENTENCE FORMAT VALUE PROPOSITIONS

## NEXT STEPS

1. Share the sample value proposition(s) with colleagues and other internal stakeholders.
2. Ask them to rate the statement(s) (1-5) based on what you offer, audience, value it brings and alignment with your strengths (what makes you unique), etc. Ask them to provide any additional feedback.
3. Consider the feedback. Does it help you better explain what you offer, how the customer can benefit from it and why the customer should choose you? If not, what words could you revise to make it better?
4. Continue to refine your value proposition until you have a clear, relevant statement that will resonate and provide value to your intended audience.

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Feature your value proposition clearly and consistently across marketing materials, outreach efforts, and platforms like your website, printed materials and social media to build awareness of your EN and what you do.

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# WORKSHEET 7

## GOALS AND OBJECTIVES

Establishing clear goals and objectives is fundamental to any marketing effort and is essential to measuring results. Your marketing plan may have one or more overall goals. With goals and objectives, it's important to be as specific as possible and include measurable targets e.g., number of new assignments or relationships, or specific organizations to work with. Set a timeframe in which you want to meet the objective(s) or intermediate milestones.

**Goal:** A short statement of the desired outcome to be accomplished.

**Objectives:** Specific, actionable steps that need to be achieved within a shorter time frame, to reach a specific goal.

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To get started, consider using the **S.M.A.R.T.** Goal framework for making decisions about setting relevant goals, action steps, measurements and timeframes.

### **Specific**

Make the goal specific and quantifiable.

### **Measurable**

Can you measure the progress to achieving the goal using metrics?

### **Achievable**

Do you have the resources, abilities and time needed to achieve the goal within a certain time frame?

### **Relevant**

Does the goal align with your mission and purpose? Will this goal have an important impact?

### **Time-Based**

Can you set a realistic yet ambitious time frame for achieving the goal? How long will it take? A month, or a year?

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## EXAMPLE

### **SPECIFIC** Goal: Increase Ticket assignments by 15% each year.

What **objectives** or measurable actions will you take to accomplish the goal?

1. Increase referrals from other organizations that serve my target audience.
  - a. By (date), create a list of at least 10 organizations that serve the target audience.
  - b. By (date), create a list of at least 5 ways to network with the organizations (events, meetings)
  - c. Network at least monthly with other organizations that serve the target audience.
2. Increase Ticketholder inquiries received through social media advertising.
  - a. By (date), identify select social media accounts/platforms used by the target audience.
  - b. By (date), begin writing weekly social media posts for the target audience.
  - c. By (date), advertise weekly in select social media accounts/platforms used by the target audience.
3. Increase Ticketholder contacts received through our website.
  - a. By (date), write a description about EN services for the website.
  - b. By (date), create a dedicated email address for receiving contacts from our website.
  - c. By (date), place a description of services on the website that includes a “contact us” link that goes to a dedicated email address.

### **MEASURABLE**

1. Number of appropriate referrals gained by networking activities.
  - a. Number of referrals gained by networking activities that result in Ticket assignment.
2. Number of Ticketholders who respond to social media outreach.
  - a. Number of Ticketholders who respond to social media outreach who assign their Ticket.
3. Number of appropriate contacts from the dedicated email address
  - a. Number of contacts from the email address that result in a Ticket assignment.

### **ACHIEVABLE**

Do you have the staff resources/time and budget in place to meet the objectives?

1. Do you have the staff resources/time and budget in place to research the organizations, implement meetings, attend networking events, and track the results?
2. Do you have a budget, writer and media expertise to purchase and create ads for social media platforms?
3. Do you have a dedicated website and technical resources to readily create, post and update content to your organization’s website?
  - a. Do you have systems in place to track responses?
  - b. Do you have the software/applications to analyze data? (Google analytics, Sprout, Hubspot, etc.)

**RELEVANT**

How does the goal relate to your mission and purpose?

**Example:** As an EN, the purpose of the Ticket to Work Program is to serve Ticketholders. The first step is to identify appropriate Ticketholders who want to work with your EN and enroll them into the program by assigning their Tickets.

**TIME-BASED**

In this case, the goal is to be accomplished each year on an annual date. The objectives also have timeframes by which they must be accomplished.

**EXAMPLE OF S.M.A.R.T. GOAL FRAMEWORK**

	<b>GOAL</b>	<b>OBJECTIVES</b>
<b>SPECIFIC</b>	Increase Ticket assignments by 15% each year.	Increase referrals from other organizations that serve my target audience. <ol style="list-style-type: none"> <li>1. By (date), create a list of at least 10 organizations that serve the target audience.</li> <li>2. By (date), create a list of at least 5 ways to network with the organizations (events, meetings)</li> <li>3. Network at least monthly with other organizations that serve the target audience.</li> </ol>
<b>MEASURABLE</b>	Develop means to track and record data.	Track data: <ol style="list-style-type: none"> <li>1. Number of organizations you network with and how.</li> <li>2. Number of appropriate referrals gained by networking activities.</li> <li>3. Number of referrals gained by networking activities that result in Ticket assignment.</li> </ol>
<b>ACHIEVABLE</b>	Identify the staff resources/time and budget in place to meet the objectives.	Confirm you have the staff resources/time and budget in place to research the various organizations, implement meetings, attend networking events and track the results.
<b>RELEVANT</b>	To begin serving a Ticketholder, they must first choose your EN and assign their Ticket to your organization.	Confirm that the organizations you target serve and can expose you to your targeted audience.
<b>TIME-BASED</b>	Annual goal	Activities have due dates and a monthly requirement.

**S.M.A.R.T. GOAL FRAMEWORK TEMPLATE**

	<b>GOAL</b>	<b>OBJECTIVES</b>
<b>SPECIFIC</b>		
<b>MEASURABLE</b>		
<b>ACHIEVABLE</b>		
<b>RELEVANT</b>		
<b>TIME-BASED</b>		

## STRETCH GOALS

Stretch goals follow the same guidelines as SMART goals, but they are more challenging and can prompt an organization to achieve results beyond the typical accomplishments. Stretch goals are a great way to push for organizational growth.

While some stretch goals may seem unrealistic, their purpose is to prompt employees to aspire to high levels of success.

With stretch goals it's helpful to visualize the progress and outcome to keep the team engaged and motivated. One way to do this is by creating a visual checklist or on a digital platform that shows and celebrates team progress toward a goal.

Consider whether setting a stretch goal is right for your organization.

### STRETCH GOAL EXAMPLE

A well-known organization houses an EN that supports adults with mental illness by providing them with on-the-job training. They've set a goal to increase Ticket assignments by 15% per year and part of their marketing strategy includes implementing a robust social media effort. They believe a stretch goal would encourage enthusiasm within their entire team and help them all get involved with promoting Ticket to Work. The organization decides to raise money to fund a new position to manage social media strategy, create social media content and purchase ads on social media platforms. They make a stretch goal to apply for 50 grants and execute 10 fundraising campaigns in the next year. Since their organization is large and well-known, the director of the organization feels that this goal is realistic for the resources they have.