

EN Essentials

Transcript: Spring into Marketing and Start with a Plan

May 15, 2024

Derek Shields: Welcome to today's EN Essentials training session, entitled Spring into Marketing and Start with a Plan. My name is Derek Shields and I'll be serving as your moderator. If this is your first EN Essentials session, welcome. Please know we designed the content for individuals seeking to enhance their Employment Network's performance and compliance with Ticket Program policies. It's really a two-fold strategy and the content of our learning events builds upon the EN Foundations modules. In this case, we bring forward some best practice strategies for your consideration and use through EN Essentials. And today, we'll be focusing on the components involved in marketing, a topic so important to all of us as we have a dynamic and changing landscape in employment support services. This is where we've got a chance to focus on our key stakeholders, such as Ticketholders, employers, and others that are key to the work that you do and how we reach them. We'll also spring into this topic, noting that the marketing, research, and planning is something that we need to refresh at times. So this time of the year, with spring in mind, we'll refresh how we look at research and planning to access these key stakeholders to increase awareness of the mission and services that you all provide. Before we begin with the presentation, I'd like to review the agenda along with a few housekeeping items. Next slide, please.

So with the content here, we have the agenda, and during this month's Essentials, we're going to focus on two areas of our marketing planning guide. Excuse me, marketing guide. We're going to focus on research and planning. Before we get into that content from our presenter today, I'll cover some logistics and do some introductions. We'll review the newly published EN Guide to Marketing and the accompanying workbook. And then after the research and planning presentation, we'll have our customary Q&A session as well. Now that we have our marketing session agenda covered, let's move to the next slide to cover some logistics, please.

All right, speaking of logistics, on this slide, we have a variety of ways that we can engage. First, TPM is recording and capturing the transcript from today's meeting, and we'll make it available on the Your Ticket to Work website at the EN Essentials Learning Events. Next. Please remember, per the Ticket Program Agreement, Part 3, Section 11, Subsection I, EN staff are not permitted to record this meeting nor capture the transcript. For questions, which we do encourage, please feel free to ask questions in the MS Teams chat section. We do ask that you reframe from answering questions in chat that are intended specifically for TPM or SSA staff. If you have additional questions

or content, you can always email those to us as well at ENOperations@yourtickettowork.ssa.gov. We'll route those through the appropriate individuals and make sure we get a response back to you. For closed captioning, it is available for participants to join using the MS Teams application or by using the closed captions link that's been posted into chat. To turn on the closed captions in MS Teams, you can go to the three ellipses that are at the top of the MS Teams window, click on more, and then scroll down the listed language and speech, and then click on turn on live captions. When we -- using that link that's in the chat option, paste that link into your internet browser, and it will open a separate window to view closed captions. Next slide, please.

As I mentioned, I am going to serve as your moderator today. My name is Derek Shields, and I'm with the Ticket Program Manager, and I serve as the Senior EN Development and Training Manager. We'll be joined today by our featured presenter, Jayme Pendergraft. Jayme is the Director of Communications and Outreach, also with the Ticket to Work Program Manager. I'll provide a little bit more background on Jayme's experience when I hand the session over to her. Well, with this in mind, let's now turn to the next slide, and we'll look at the Employment Network Guide to Marketing.

We'll start here today by ensuring your awareness of this new tool, the EN Guide to Marketing. It's a new resource to assist Employment Networks for marketing services to your clients and your stakeholders. It uses a traditional public relations framing for developing a robust marketing plan, and it shares a lot of practical strategies and best practices approaches that you can use to market your services to a variety of communities of interest, your stakeholder populations. Assuming most ENs have an established mission and have determined that you can be successful with the Ticket Program, the Marketing Guide goes a little further and offers suggestions that you can use to revisit, refine, or enhance mission and existing marketing operations. The guide includes key marketing concepts tailored to your needs and offers step-by-step guidance for developing a marketing plan and description of each of the components. And the keys are research, planning, implementation, and evaluation. There are strategies and ideas for implementing the marketing plan and using popular marketing channels that we see successfully used today and connects in specific Ticket Program tactics. The content and resources that have been developed by and for the Ticket to Work program are included, and that will aid ENs in launching and maintaining fresh content for marketing efforts. With this in mind, the EN Guide was published to assist some of you who are already doing great work in this area, or perhaps you're an EN with somebody that's been recently tagged to do some marketing efforts but didn't have really formal training. This will provide a structure for you to lean into, to boost your confidence in a proven marketing model. To further support you, let's move to the next slide.

We also published a complimentary workbook for the EN Guide. The Marketing Guide has a connected workbook with in-depth information, examples, and templates related to the fundamental marketing components that are covered in the four segments

—research, planning, implementation, and evaluation. The workbook is an accessible, fillable tool. While it's one document, each of the worksheets can be used separately, if you like. And you can fill them out as you're going through the EN guide and putting in ideas, or you can use them separately as an individual or a team. These worksheets will help in audience identification, conducting a situation or situational analysis, looking at your mission statement, and perhaps refreshing it, looking at your unique value proposition, or propositions, depending on how you look at your work, and helping with a brand identity, or potential rebranding, or brand refresh project. And last, it connects into your goals and objectives. There are a lot of worksheets there with 22 pages of accessible, fillable PDF where you can place your ideas directly. And many of these topics today we'll cover in the specific research and planning sections of the content. And speaking of research and planning content, it's now my pleasure to introduce our guest speaker today.

Many of you know — perhaps know Jayme from some of our All EN Calls over the years. Jayme, as I mentioned, is the Director of Communications and Outreach for the Ticket to Work Program. She's a skilled strategic communicator and project manager and provides direction and thought leadership in the research, planning, development, and implementation of multiple communication efforts across a variety of channels and platforms. Jayme has supported the Ticket Program in a variety of communications and outreach roles since 2007, and Jayme and I worked together back then. It's kind of fun to reunite. Jayme has led the development and implementation of several award-winning outreach campaigns. In addition to her work on the Ticket, Jayme's work is also focused on stakeholder and community engagement and relationship building for various other federal programs. She brings all this experience to us today and we'll begin with research. I'll be back in a little while to moderate the Q&A and now over to Jayme. Thank you.

Jayme Pendergraft: Good afternoon. And, Derek, thank you so much for that kind introduction. It certainly is great being back on the team with you again. We missed you for a few years there. I do want to welcome everyone to today's EN Essentials. And as Derek mentioned, we will be focusing on the research and planning portion of the guide. We will talk a little bit more about the implementation and evaluation part of it in next month's EN Essentials. So stay tuned for that. I am very happy to be here with you to talk about several key topics that we hope will help you reach your community and increase Ticket assignments. All of today's information is in that EN Marketing Guide and worksheets that Derek just discussed. And we encourage you to keep that on hand as a reference tool when you think about how to promote your organization. As I mentioned, today, we are kicking it off with research. Next slide, please.

Research is exactly what it sounds like. Begin by gathering information about your EN's environment. To be effective, you need to understand the need for your services, the audiences you seek to reach, and the opportunities or barriers that will influence your success. We'll talk a bit further about the research process in the coming slides. Next slide, please.

One of the first steps in developing your marketing plan is determining your audience. Who does your EN want to serve? Are you focusing on a certain area, specific group of people? Or do you plan to serve all Ticketholders in a certain community? Then I encourage you to remember that it is much harder to do alone. Derek mentioned that a lot of my background is in relationship building and stakeholder engagement. And there are people out there who can help you. So as you're conducting your research, who can help you reach your audience and accomplish your goals? Do you have relationships with local or national organizations that serve the same or a similar audience? If you don't, try to identify them and start building those relationships. Set up a meeting and let them know you're available to help their audience navigate the Ticket Program. And of course, I'm sure many of you know that you'll also have to educate them about what Ticket is. So I encourage you to get those doors open if you don't already have some relationships out there and keep at them and keep building those relationships. We also encourage you to seek guidance from others. There may be another EN serving a similar audience in a different location. Feel free to give them a call. I'll say you all are wonderful and you're so helpful in every aspect of everything that you do that I know that a lot of you are very open with the marketing and outreach advice you provide for your colleagues. So give another EN a call and see what their advice is. Or as you're developing relationships with those other organizations I mentioned, ask them what's worked for them in terms of outreach to your audience. They've been doing it for a while, so they know what works and what doesn't. Next slide, please.

Next, it's time to determine your purpose to help identify which people or organizations can help you achieve your goals. Excuse me. Your purpose may be to increase assigned Ticket holders, build awareness of your EN and your services, or to find jobs for Ticketholders. Or it could be all three. You may identify more than one purpose, which means you'll have several audience segments to target. For example, today's sample EN has decided that they would like to increase the number of veterans in their community with Ticket assignments. This EN might reach out to the local American Legion or Paralyzed Veterans of America chapter with the veterans themselves as their audience. But if you want to find jobs for these veterans, you could identify employers with a good track record of hiring veterans and conduct some outreach with them. So you're looking to identify and then further segment your audience into different groups. Next slide, please.

This leads us more into audience segments and targets. And to help identify and segment your audiences, you should target specific audiences within a segment, prioritize those targets, and identify what they need so that you can address what they care about. Our EN is focused on increasing those Ticket assignments among veterans. And that is your defined purpose. And now they have segmented their audience. We talked about employers and the veterans themselves. The next step is to identify and prioritize specific groups within that audience and focus your marketing efforts on them. Is there a specific group of veterans you'd like to focus on? You could choose to work mostly with your local American Legion, as I mentioned earlier. Or you might have a nearby Wounded Warrior program looking to connect veterans with job opportunities.

You might have a specific type of disability that a veteran may be more likely to have. For example, you may want to focus on veterans who have PTSD or veterans with limb loss. And you can target specific groups within your target audience to segment it out further if you choose to do so. Next slide, please.

Now it's time for positioning. Positioning is identifying what the audience needs help with that your EN can provide. This will help you create marketing materials and messages that address the needs and are likely to appeal to your target audience. Does the veteran community need increased awareness about the Ticket Program? Start with developing a flyer, having an informational session, or even trying — or even inviting them to one of our WISE webinars. Remember, the materials we create at TPM are there for your use. We encourage you to take advantage of them and share. Maybe the employer community also needs increased awareness about the Ticket Program, or just needs to know that there are veterans out there looking for work, and you can figure out what type of marketing and outreach you need to do to those employers to make sure that they're aware of your services and what you can provide. Next slide, please.

Here's an example of how you can break down your audience. There may be a large number of veterans in your community who need reasonable accommodations, but don't know much about them. Since this is your audience, you can position your EN to communicate about the availability and types of accommodations for veterans with disabilities. This could be outreach directed at the veterans themselves, their spouses or family, those veteran service organizations I mentioned, or even coordinated with VR&E counselors. You could also work with those employers we've talked about to help them understand the low or no cost of most accommodations, as many still are unaware that it's very simple to fill most reasonable accommodation requests. Next slide, please.

So now you have your purpose, and your audience identified. It's time to do a situational analysis. This helps you assess internal strengths and weaknesses as well as external opportunities and threats that may impact your marketing strategies. You can look at your EN's priorities and goals and examine what you aspire to and what is possible. There are a couple of ways to do this. One of them is called SWOT, S-W-O-T, which stands for Strengths, Weaknesses, Opportunities, and Threats. And the other is called SOAR, S-O-A-R, which is Strengths, Opportunities, Aspirations, and Results. SWOT analysis tend to focus on internal and external strengths and weaknesses. They look at the whole picture, positive and negative. SOAR analysis focus on your organization's strengths, what do you do well that you can capitalize on. Both of these activities can be very helpful —

Derek Shields: This is Derek. I'm just checking in here. I lost audio for Jayme.

Jayme Pendergraft: It's Jayme. I can hear you, Derek.

Derek Shields: All right. We can hear you again. We just lost you for about 10, 15 seconds. If you could just start up again, everything is back.

Jayme Pendergraft: Sure. All right. It's Jayme. Thank you. So we will step back a minute, and I will talk about SWOT analysis again. So they focus on internal and external strengths and weaknesses and look at the whole picture, positive and negative. While SOAR analysis focus on your organization's strengths; what do you do well that you can capitalize on? Both of these activities can be very helpful for your organization in a variety of ways. SWOT is more likely to help with that thorough examination of your organization, examining internal and external, conducting the analysis internally and externally, while SOAR can help with team building and brainstorming with its inclusive, optimistic approach. Next slide, please.

Whichever type of analysis you decide to conduct, there are some questions to consider. I'd like to walk through an experience I had a while ago. When I first started supporting the Ticket Program back in 2007, as Derek mentioned, my role was to work with the WIPA projects and encourage them to host in-person WISE events. Those of you who have been around for a while probably remember this time. We had to basically encourage WIPAs to coordinate with community partners, including you all as Employment Networks, VR agencies, PABSS, and other partners in the community, and then invite Ticketholders to attend informational sessions about the program. In the first year, WISE events were required. WIPAs hosted a grand total of about eight events nationwide. At that time, there were over 100 WIPA projects. So I had a big challenge in front of me. My first step was to understand the WIPA projects. I was brand new to this world. I was still learning Ticket, didn't know what a WIPA did or an EN. So I kind of came in as a community relations and stakeholder engagement person who needed to learn how to work with the WIPA projects. So what are the WIPAs best qualities or specialties? At that time, many of those WIPAs excelled at community outreach and participated in local activities regularly. They know the need for their services in their community. Back then, there were no CPWICs or other benefits counselors. People needed the information WIPAs could give them. The WIPAs absolutely have the expertise in work incentives and other benefits. My next step then was to help the WIPAs identify these strengths and opportunities. Many of them were already hosting events that could be easily made into WISE events. I just had to help them see how. Answering these questions as I took on this project led to increased engagement from the WIPAs, and when in-person events ended, we were supporting over 700 a year. That situational analysis helped me identify what some of the issues were relating to hosting WISE events and then identify the opportunities we could seize. Next slide, please.

Through research, you can determine whether your mission is viable and shape realistic marketing goals and targeted plans. Take some time to identify obstacles, like I did with the WIPAs. Do you have a budget or staffing constraints? As an EN, is there a lack of job opportunities in your area? Do you have a lot of competition? Remember those WIPAs? I worked with them to identify the answers to some of these questions and help them develop strategies to address them. No staff or budget to handle marketing. Remember, I mentioned all of those resources we provide in the Service Provider Toolkit? Make sure you use what we have and try some relatively inexpensive

marketing activities, like social media. For many in our field, what we aspire to and what we care about is fairly obvious. We want to ensure that people with disabilities have access to the opportunity for self-sufficiency through work. When you're thinking about what you aspire to, you should focus on one of the goals we talked about earlier. In the previous example, our EN was trying to serve veterans. Use this as an opportunity to answer those specific questions as you identify obstacles and aspirations. Why do you want to serve veterans? Why do you care deeply about those veterans? And what can you be best at in this particular situation regarding veterans? Now we're about to switch gears a little bit and discuss planning. But first, if you've done any of these tactics for your employment network, we encourage you to let us know how it went in the chat. Did you have any stumbling blocks? Did you see great success by doing a SWOT or SOAR analysis? How have you worked with your staff to do an analysis? Did you — tell us about building relationships in the community? We'd love to hear more about what your experience is with this portion of this presentation. So let us know in the chat. Next slide, please.

So now the research is complete. Although I will say every part of this presentation in the EN Marketing Guide is ongoing. You may complete a SWOT analysis or a SOAR analysis. You may develop a lot of the content we're about to talk about. But sometimes things change, and goals can change. And even the mission of your organization may change. So I would keep in mind that everything is kind of fluid and that it's okay to go back and try something new if something is not working out for you. So at this point, you have completed your research and now it's time to start the planning process. Planning begins with developing your mission and mission statement, value proposition, brand identity, and then setting goals. Let's jump in. Next slide.

Through research, you've determined whether your mission is viable and shape realistic marketing goals and targeted plans. Your mission is the why behind your organization and should be the driving force behind your work. As a potential employee, partner, or client, I should be able to understand what you do and see some meaning associated with it. I want to share a couple examples of mission statements, and I'm not going to tell you who they belong to quite yet. If you know any of these companies, feel free to drop them in the chat. The first one is, "Discover and spread ideas that spark conversation, deepen understanding, and drive meaningful change." Here we have a purpose, which is to discover and spread ideas, and they've also made it meaningful because they hope to drive change. The second one is, "To entertain, inform, and inspire people around the globe through the power of unparalleled storytelling, reflecting the iconic brands, creative minds, and innovative technologies that make ours the world's premier entertainment company." That one is on the long side and a bit of a run-on sentence, but their mission statement does include a strong value proposition, which we will discuss in a moment. And the third one is, "We inspire, educate, and outfit for a lifetime of adventure and stewardship." Don't forget to drop these in the chat if you know who they are. This organization wants to make sure you know they're dedicated to the outdoors and adventure, and stewardship is their top priority. So they are highlighting their priority in their mission statement. So I'll give you another second to guess. But the

first one, "Discover and spread ideas that spark conversation, deepen understanding, and drive meaningful change," belongs to TED. The second one, "To entertain, inform, and inspire people around the globe through the power of unparalleled storytelling, reflecting the iconic brands, creative minds, and innovative technologies that make ours the world's premier entertainment company," is Disney. And the third one, "We inspire, educate, and outfit for a lifetime of adventure and stewardship," is REI. I'm guessing some of you got at least one of those or close to them. I know there are some companies that are similar. But these statements really do reflect the company's purpose now that I've shared exactly which companies they are, you can likely see that they align very well. So definitely be sure to make sure your mission statement reflects well and is meaningful to your team members and the people you serve, and that it communicates your key audiences, shows your purpose, and defines your identity values, and has an impact on all of your potential decision-making activities. Next slide, please.

So now let's get into how those companies identified their mission statements and how you can make your mission statement work. Your mission statement is the cornerstone that defines your organization's identity, values, and decision-making. Since you're all already ENs, you have a mission statement that includes all of this and how you connect it to the Ticket to Work Program. Excuse me one second. We wanted to provide a couple of reminders for those of you who may be revisiting this topic. Your mission statement should sync with your overall mission and clearly state what you want to achieve and why. It should align with your values and culture and serve as a motivational guidepost for your work. Be sure to keep the language simple and brief, but also inspirational and meaningful. It should be about one to two sentences that capture what you do. Next slide, please.

A typical mission statement contains three key elements. The purpose, what are you trying to achieve. Draft a statement that summarizes what your organization hopes to achieve for your audience and consider the strengths and opportunities you identified by completing that situational analysis. Then you're going to define your ideal customer or target audience and draft a mission statement that resonates with that audience.

Next, how will you achieve the purpose? Draft a statement that includes how your organization will accomplish the purpose for your target audience. Here's an example of a potential Employment Network mission statement. ABC EN matches veterans with disabilities to jobs, then provides the support and services needed to ensure success for both the employee and the employer. So what are they trying to achieve? They want veterans to have access to jobs, and they want both the veteran and the employer to be happy with those services. Their ideal customer target — their ideal audience is veterans, again, as we're walking through that example. It certainly doesn't have to be veterans. Many of you serve other communities. You could serve a community with native people with a particular type of disability, or you could serve people who want to become self-employed or work from home, or just people who live in a certain state or area within a state. So veterans is just the example that we're using here today. This one is a little bit lacking on the how, but we do see a how in that the ABC EN matches

those veterans with the jobs, so that EN has those job-matching capabilities, and then will continue those support and services to make sure that both of the EN — or both the employee and the employer are happy with the services. Next slide, please.

So next up is your value proposition. This makes you stand out from others and tells your audience why they should choose you. The components of a value proposition should include your audience. In our example, we're sticking with our EN — or sorry, my apologies, veteran audience. What are you offering? What do you offer that solves a problem for your ideal customer or audience? You're offering support to help them achieve a self-supporting future through work. Next up, what's your value? What benefits from your offering matter most to your customers? Here you can focus on financial independence and the other non-financial benefits of work. Why do people want to work with you? Why should people want to participate in the Ticket to Work Program? What's in it for them? And then the differentiator. Why should the customer trust you over someone else? Do you have someone on your staff with a knowledge of veterans' benefits and Social Security benefits and how they intersect? Have you built relationships with veterans' organizations and employers in your community? Find a way to make yourself stand out. In looking at another example, if you're just doing a geographical audience, target audience, so you could say, you know, you have placed X number of -- filled X number of jobs in the past two years or something like that. Show your track record and show how you stand out. I wanted to share another example from Disney. They identified value propositions based on several targeted audiences. These included kids, families, other competitors. But for families, they say they will create world-class stories and experiences for every member of the family. If you don't know Disney, you don't know why that stands out. But if you do know Disney, you know that they do a great job at entertaining the entire family. And this is reflected in their value proposition. They want you to know that Disney movies aren't just for kids. Disney World is fun for adults, too. So they make sure that their family audience is targeted with marketing that reflects that differentiator. They're in it for all of us. Next slide, please.

So now it's time to talk about developing your specific value proposition. There is a chart on the slide that talks about — that identifies organizing your thoughts by audience, offering value and differentiator. So those are those four topics we just discussed. And we'd encourage you to start by outlining four value proposition components into sentence format. So write out who your audience is, what you're offering, what the value is, and what differentiates you from your competition. 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. And I would encourage you to get feedback every step of the way in this process. You could have feedback on your situational analysis, your mission statement, just every step of the way. It's really important for others to have eyes on what you're doing. And I would encourage you to not only get feedback from your colleagues, but also from potential clients, family members. Really just ask anyone you think may be insightful into what you're doing. And give you an honest opinion. Your colleagues in the EN community

and other Ticket Program service providers, I'm sure, would be happy to give you some feedback as well. You do want to feature your value proposition clearly and consistently across your marketing materials, outreach efforts, and platforms like your website, printed materials, and social media to build awareness of your EN and what you do. Next slide, please.

A strong mission statement sets the stage for developing your brand identity. Building a positive, cohesive brand image relies on the research you use to develop your mission, which includes your organization's purpose, goals, audience, and messaging. Now it's time to talk a bit about your brand identity. The visible elements of a brand include your logo. This might consist of the organization name only, or include a symbol, or both. On this slide especially, we do strongly encourage you to work with a professional graphic designer to develop your logo if you don't have one on staff. There are a variety of online freelance tools where you can post a job and get bids on the work. A professional designer's work will pay off in both the short and long term. They can help you identify your color palette, fonts, icons, and design style to give your materials a cohesive and professional look. Once you have all of that in place, they'll give you what you need to go forward and make sure that you maintain that cohesive brand identity. Next slide, please.

As I mentioned, you should also make sure your brand is consistent. You should ensure all of your marketing activities and content reflect that brand and vision identity we just talked about. You also need to ensure that all of your content is accessible to people with disabilities according to the communication technology requirements covered by Section 503 of the Rehabilitation Act. This includes your website, social media, email, and more. For more information on 508, you can visit 508.gov. There is a list on the slide. It runs from websites to signage to flyers, event materials, media kits, newsletters, email templates and signatures, social media. You want to make sure that you are being consistent across all of your marketing and outreach materials. It helps you build recognition for your organization and also for the services you provide and the Ticket to Work program. We do have some Ticket Program with those available in the service provider toolkit under your Ticket to Work website. You are welcome to download those materials. But there are several different types of logos depending on where you would like to use them. So as you're building your own brand, we would also encourage you to kind of utilize those logos and other materials as well. Next slide, please.

Now that we've covered all the pieces of building your brand and strategy, it's time to set some goals. Establishing clear goals and objectives is fundamental to any marketing effort and is essential to measuring results. To get started, considering using the SMART goal framework for making decisions about setting relevant goals, action steps, measurements, and timeframes. SMART goals are specific. Make the goal specific and quantifiable. Measurable. Can you measure the goal in progress using metrics? Achievable. Do you have the resources, abilities, and time needed to achieve the goal within a certain timeframe? 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 timeframe for achieving the goal? How long will it take? A month or a

year? For example, as an EN, the purpose of the Ticket to Work program is to serve Ticket holders. The first step is to identify appropriate Ticket holders who want to work with your EN and enroll them into the program by assigning their Tickets. Next slide, please.

After you've set objectives, your strategy describes how you intend to meet them. Keep in mind who you've identified will be your primary audience and determine how to engage them. In this example, your goal is to increase Ticket assignments by 15% each year. This is specific, measurable, and time-based. You're going to do this by increasing referrals from other organizations that serve your audience. You're going to achieve your goal by networking with these other organizations. Next slide.

Now, let's get into the details. You can start by creating a list of at least 10 organizations or whatever number works for you and your goal that serve the target audience. These could be new or organizations you already work with, though your strategy may have to be a little different if you're already getting referrals from them. You can set a deadline for creating this list, then identify at least five ways to network with them. Will you attend events, set up one-on-one meetings? Set a deadline for that as well. Then set a realistic cadence. In this example, we encourage the EN to network at least monthly. Now your goal is specific, measurable, and time-based. Next slide, please.

Now for the A and the R in SMART, achievable and relevant. The goal and objectives are achievable if you have the staff and budget in place to research the organizations, implement meetings, attend networking events, and track results. The goal relates to your EN's purpose to increase Ticket holder participation in the Ticket to Work program. So that makes it relevant. As you think about goal setting across your organization, keep the idea of SMART goals in mind. Setting SMART goals can help goals become more achievable, measurable, and easier to follow. Next slide, please.

So you might be wondering how you'll get all of this done, and it does take time and a budget. An important component of planning is to determine which amount -- what amount of funding is available to support your EN's marketing efforts. Once you've decided what implementation activities you'd like to undertake, you will need to reconcile their costs with your available funds. Price not only the cost of the individual strategy, for example, advertising, print material, conference attendance, but also determine who will conduct the activity to account for the cost of staff labor. Include a 5% to 10% contingency fund for unexpected costs. And ensure that you have a plan for how you'll track these expenses. We understand that many of you do not have substantial marketing resources, and that much of your time and energy are focused on serving Ticket holders. If you're in this situation, you should know that your marketing efforts don't necessarily have to be this robust, and you don't have to reinvent the wheel. I've mentioned a couple of times, and I again strongly encourage you to repurpose our content from [choosework.ssa.gov](https://www.choosework.ssa.gov). You can grab successful stories, fact sheets, webinar archives, upcoming webinar information, and more. And of course, you're always encouraged to share our social media content. The marketing learning module talks more about how to do all of this. Next slide, please.

We're about to get into some questions, so please drop your questions in the chat or get ready to speak by raising your hand. I do also want to encourage you to tell us any stories about setting goals for your organization or developing your mission statement, things like that that you think that your colleagues here on the call might benefit from. So definitely get those questions in the chat, get those stories in the chat. But first, we wanted to announce next month's topic, which is Reach Out and Stand Out Using EN Marketing Tactics. Today, we talked about research and planning, and next month, we'll talk about the actual implementation and evaluation. We'll get into more detail about a variety of marketing channels and describe some of those Ticket Program resources I mentioned a few minutes ago. With that, I'd like to hand it back to Derek to see if we have any questions.

Derek Shields: Thanks so much, Jayme. Maybe take a moment to get a sip of water. I'm going to ask Alicia to go to the next slide and give a couple reminders for folks about how to participate in Q&A.

As Jayme said, we encourage you to put in your questions or comments. And we've heard a couple areas where there might be some struggles in terms of marketing tactics as well. What we'd like to do is focus, of course, on research and planning today and to think about how that could be done to maybe solve some of those challenges. We do ask you to use MS Teams chat feature. Also, please refrain from answering any questions intended for TPM or SSA staff. A couple of reminders of joining via phone. There's a two-step process to ask your question. Press star five to raise your hand, and we'll unmute your phone. And then second step, press star six to speak. If you're in MS Teams and you wish to ask a question aloud, please use the raise your hand feature, and then we'll unmute your mic. And we do ask you to let everyone take a turn to have a question. If we run out of questions, we could go back to somebody for a second one. If you prefer, you can send in questions or additional questions after the event, always to ENOperations@yourtickettowork.ssa.gov.

All right, with that, Jayme, we do have a question that came in a little bit ago that was in chat. The question is, "We have used a wide net so we can increase outreach, in order to strive toward the required new IWPs, but we're struggling to enroll the minimum number. I wonder if we are too broad based upon your suggestions? Yet we worry to still reduce our chances of meeting enrollment goal." So it's a pretty specific question, but thinking of your presentation on research and planning, when we reevaluate through research and planning, and we've cast a wide net to find our audience, and build a funnel to get enrollments of new Ticket holders, and it's not working, what would you recommend in terms of using the research and planning process to reevaluate that challenge?

Jayme Pendergraft: So it sounds like this is an EN that serves a broad area and a broad group of people, and is not likely very focused on one particular audience. Since you have cast a broad net, there are a couple of things I might do. One, is take a look at what is working. So where are you getting those referrals from? Is there a particular organization that has really panned out and resulted in a lot of referrals for your EN?

And then on the flip side, do that situational analysis and see what's not working. Maybe you've targeted a couple of, let's say, mental health organizations in your community, and you've gotten silence and no referrals from them. Maybe stop doing that. Find another group to do some outreach to. Not all groups are going to be very responsive. It just happens that way. It happens with us here at TPM all the time. Sometimes we strike out and get no results from our outreach, and other times we find basically a gold mine and get a lot of results from what we're doing. So I would just say step back and look at what's going well and what's not. And if you are interested in identifying a new, more specific audience to reach out to, add that to your goals. Make a goal and say you're going to develop these relationships and you're really going to focus on them.

Derek Shields: Nice. Thank you, Jayme. Let me bring up Britney. Britney, there's been some activity in chat that I haven't been able to track specifically. I know there's been some comments about thanking Jayme for the presentation. Any other questions out there that you would like to bring up for Jayme?

Brittney Boyd: Yes. We do have another question from Sandra. It says, "Does anyone have any suggestions as to how to pull companies to partner with an EN in providing job listings for employment?" And she did get some responses from other ENs on strategies that they have used as well. But I'll pose it too, as well to you, Jayme, if you have any others?

Jayme Pendergraft: Sure. And I would like Derek to weigh in on this one as well, because he has a lot of experience in this area too. Again, in my background, I always get to that relationship building and strategic planning and partnerships. Go to the employers. Go to, if you're in Atlanta, let's say, and Coca-Cola is down the street, go have a meeting with HR. Get yourself known and in front of the employers that you're trying to -- that you are aware of that have a lot of job opportunities in your community and set up meetings and just get yourself in the door and tell them about Ticket to Work and what you do as an employment network. Derek, what do you want to add to that?

Derek Shields: Yeah, thanks, Jayme. I think, you know, all of this doesn't happen without employers. And I'd really recommend, even if you've done it before, to go back and use the tool. The situational analysis could be conducted, with some research in mind, about employers as a stakeholder population. For me, I always think about when I'm working with employers, I think first about, well, what is the state of the industries that I'm trying to place people into? And in some states, we have very low unemployment rates and there's a lot of employers that aren't able to find talent. So if we do that as part of our research, then we could identify, well, inside of, we'll say retail in general, there's an opportunity. And then, well, let's say in New England, there's two states that have very low unemployment rates. Well, what employers are successful? CVS and Walgreens have done great work in disability inclusion and employment. Well, who are their competitors? Because they're also having similar challenges in finding talent. And if they have a diversity, equity, and inclusion program, they also have a disability inclusion program. You need to get to know them because they need talent, and you have talent. So I would run through that model. What's unemployment like in

certain sectors? Do we have relationships with them? And then how do I find those people? Well, they have to have a demonstrated commitment somewhere. So search for that disability inclusion activity. They probably have an employee resource group if they're a large employer. If they're a smaller employer, you know, then you do kind of the one-to-one meeting like Jayme is talking about.

So that's how I would approach it. And while you only have a limited amount of resources, the employer positioning and partnership is as important as anything here. And then once they come out and you have a success, they're going to ask for more. And normally I would take it a step further too as an implementation tactic, get their testimonial because their awareness building for you as their sourcing partner is going to reach a lot more people than many smaller ENs can afford. So something to keep in mind, get your testimonials. And I think Jayme will probably get into that a little bit more next month too. So thanks for that question, Brittney. Let's go over to Katherine. I think we have a raised hand. Katherine?

Katherine Jett: Hi, Derek. Yes, we do. Hi, John. You have access to your audio now. If you'll just click the microphone to unmute and ask your question. Hello, John. If you'll just go ahead. You have access to your audio now, sir. Just click the microphone up top. And you'll ask your question. And the hand has been lowered. Derek, we don't have any more raised hands at this time, sir.

Derek Shields: Okay. Thanks, John. Try again and we'll get you in there if we can. Might be having a technical issue. Let's circle back to Brittney. Brittney, any other questions or points in chat that you'd like to bring up?

Brittney Boyd: My next question actually was John's question. I'm assuming that's what he was going to ask. He was asking about other ways or suggestions to market Partnership Plus and connecting with state VR agencies as a way to, as a marketing tactic.

Jayme Pendergraft: So I can talk a little bit about relationship development. As I mentioned with the employers, you know, get through the door. Tell the VRs about Ticket. Tell them about your services. Tell them about Partnership Plus and that it's available. You really have to build those relationships to make it work. And I just encourage you to do that. However, now I'm going to give it to Derek because this is really his area.

Derek Shields: This is Derek. Thanks, Jayme. And as Ana, I think, has put in chat, if you're unable to ask your question through raise your hand or, you know, phone, please drop them in the chat. We'll try to get to a couple more. Yeah. I think in terms of relationship management, research and planning, I would recommend understanding what is the state of your states', that you're working in, vocational rehabilitation system today? I'm familiar with a lot of states that have had leadership transition and staffing transition. So trying to better understand where they are. Are they participating in things like the Rehabilitation Services Administration's Disability Innovation Funds, where if you're focused on, you know, placement and employment for youth in transition, or kind

of early career positions, well, if they're supporting disability innovation fund models, then you really have a similar stakeholder. So you could approach those projects which are coming through state voc rehab funding and figure out potentially how you could be part of their sourcing solution. If you have the relationships with some employers, they're going to need some supports to ensure customized integrated employment. And kind of retention strategies are available. So I think there's some ways to look at Partnership Plus as a formal model, but you could also look at it as more of an informal relationship with your state VR agency too, depending on where your state is. We also appreciate your participation in our state collaboration calls, where we bring in the Ticket to Work Coordinators in each state. And whether there's a formal Partnership Plus model for a handoff or an informal one, you can get to know each other. And so much about marketing is repetition and continuity of trust. And so coming to these meetings and helping to build that trust will ensure that you have access to more, I guess, those Ticketholder assignments. And one individual said that was a little challenging before. It looks like we have one question dropped into chat. And I know we're going to run out of time. So let's get over to Brittney to see if we can get to John's question.

Brittney Boyd: Yes. John was asking, he added a clarification to his question. It was more so if the VR feels that Partnership Plus is showing favoritism, how can they better market Partnership Plus to make it not seem like it would be favoritism?

Derek Shields: Well, this is Derek. I'll answer that. But if you have that and you'd like a more formal answer, we could also have you email it to at the ENOperations@yourtickettowork.ssa.gov and bring in folks at SSA as well. You know, favoritism in Partnership Plus or how do we develop a variety of relationships with the VR agencies? One is coming to those state collaboration calls that we host and working with the Ticket to Work Coordinator, so they better understand your services and your positioning for those services. I think to me that's a lot about understanding what your brand promise is and then how you support that through the value of your follow-on services. So if you haven't looked at brand promise, when I do situation analysis and brand strategies with organizations, I really laser in on brand promise because we could do all these things at the end of the day. What's our return on the brand promise? Is how we're going to keep building trust with individuals. So I'd encourage that. Jayme, you know, we're running out of time. I want to circle back to you quickly with the final question. You know, it matters to me a little bit here. We have a new guide, and we have a new workbook. We have a lot of ENs that wear — people doing marketing with multiple hats. What do you recommend to them to surround themselves with other marketing and communications thinkers, so they're not isolated in this? Any suggestions that you've done in your career that you would share?

Jayme Pendergraft: Sure. So there are a lot of groups on LinkedIn that can be very helpful. And honestly, just start contacting colleagues at similar organizations. It could be in an EN. It could be someone who does marketing for one of the local or national disability organizations. And also just start seeing what you think works and that could work for you. So if there's a local disability organization that you think is just crushing it

at their marketing and outreach, get in touch with them and start building that relationship. I'll just keep saying it over and over again. It's so important to find out what other places are doing and just learning how they think about what they're doing. So, yeah, just find somebody you think looks interesting and reach out. Pick up that phone. Send an email. And almost always they'll be happy to talk to you.

Derek Shields: So, Jayme, thank you so much. At this point, I've got to recognize Jayme for sharing her experience and knowledge with us today. And we're going to have to proceed to wrap up. So if we can move to the next slide.

Yeah, Ana has recognized in chat that she was going to reach out to someone. But if you have specific questions or we didn't get to something, as always, email us at ENOperations@yourtickettowork.gov. We can connect your EN Development and Training Analyst to you to talk about those state calls. On this slide we have the two links to the EN Guide to Marketing and the Workbook. We also dropped those into chat. Thank you, Ana. We encourage you to explore those and to share them with your team as you select one of the analysis models, either SWAT or SOAR. If we could go to the next slide, please.

Upcoming events we'd like to remind you of. On May 25th, we'll be doing our next WISE webinar. That's next week. Expanding your job search with Ticket to Work. We're pleased to welcome back Ray Cebula to cover such things as useful strategies and resources like federal employment, Section 503, and connecting with federal contractor employers, and also apprenticeships. Then on June 12th, we'll have our next EN Essentials. Jayme gave you a preview of that. I think we'll get into the exciting areas of implementation and evaluation, and you'll enjoy what we have in store there. And then on June 18th, with Social Security, we'll be providing the All Employment Network Call. So put those on your calendars, please, and check the calendar for events that has been dropped into chat. If your colleagues — if you have colleagues that want to access these EN Essentials recordings, we encourage you to go to yourtickettowork.ssa.gov and access those under the calendar of events section in the archives of the recordings. And with that, I would like to once again thank Jayme. On behalf of the Ticket to Work team, we appreciate your time today. We also appreciate you attending the EN Essentials and participating with your questions. I'd like to also recognize our team that was behind the EN Marketing Guide and Workbook, including Hillary Vance, Nicole Black, Tammy Liddicoat, Pat Van Nelson, and Abby Schneider, along with our colleagues that supported this project at Social Security. There was a lot of effort that went into it, and we're pleased to have those tools. Again, we appreciate your feedback. Email us at ENOperations@yourtickettowork.ssa.gov on what you liked or disliked about this event and your recommendations for future training sessions. This concludes today's EN Essentials. Thank you.