

***Spread the Word:***  
**Marketing Self-Management**  
**Education Through**  
**Ambassador Outreach**

**Satellite Conference and Live Webcast**  
**Monday, June 10, 2013**  
**12:00 – 2:30 p.m. Central Time**

Produced by the Alabama Department of Public Health  
Video Communications and Distance Learning Division

**Faculty**

**Teresa Brady, PhD**  
**Senior Behavioral Scientist**  
**Arthritis Program**  
**Centers for Disease Control and**  
**Prevention**

**Plan for Session**

- **Consumer perspectives on self-management education**
- **Grassroots marketing concepts**
- **Ambassador outreach strategy and materials**
- **Key learnings from pilot test**
- **Lessons from the field**

**Question**

- **How do most participants learn about your workshops?**  
– **Word of mouth**

**How Can We Create More**  
**Word of Mouth “Buzz”?**

**Audience Research**

- **49 focus groups**
- **Approximately 375 participants**
- **Black, white, and Hispanic**
- **Ages 45-70**
- **Mix of education and income**

### **Audience Research**

- Self report of doctor dx of arthritis
  - Some limitations due to arthritis
  - 60-80% report at least 1 co-morbidity

### **Audience Research**

- **Key Learning #1:**
  - **Consumers unaware Self- Management Education (SME) workshops exist**

### **The Consumer Perspective**

- **SME Program Awareness**
  - Self-management / skill development not top of mind
  - Vast majority never heard of self help courses
    - Surprised they exist

### **The Consumer Perspective**

- Never looked for a course
  - Assume arthritis is something to be tolerated, not actively managed
  - If it existed, someone would have already told them
    - Particularly doctor

### **Audience Research**

- **Key Learning #2:**
  - **Preferred message carrier?**
    - **Someone like me**

### **The Consumer Perspective**

- **Preferred Message Carriers**
  - Someone like me
    - Preferably someone I know
  - Who has a condition / situation like mine
  - Who has benefited from the intervention
  - “The voice of experience”

### **Audience Research**

- **Key Learning #3:**
  - **Preferred description:**
    - **Workshops . . .**
    - **To help you learn . . .**
    - **Techniques or strategies . . .**

### **The Consumer Perspective**

- **Preferred Descriptors of SME classes**
  - **Self-management**
    - **Not self help or self care**
  - **Help you learn**
    - **Rather than “teach” or help build skills**

### **The Consumer Perspective**

- **Workshop**
  - **Not classes or courses**
- **Call these techniques or strategies**
  - **Not tools or skills**

### **Audience Research**

- **Key Learning #4:**
  - **Bothersome symptoms and threats to valued activities motivate action**

### **The Consumer Perspective**

- **Motivators for action**
  - **Reducing pain and limitations**
  - **Increasing mobility**
  - **Maintaining independence**
  - **Maintaining valued life activities**

### **Audience Research**

- **Key Learning #5:**
  - **Current Stanford SME workshops have attractive characteristics**

### **The Consumer Perspective**

- Desirable characteristics of SME
  - Topics to make course worthwhile
    - Ways to reduce pain
    - Gaining sense of control over arthritis
      - Especially pessimists
  - Share experiences / learn from others

### **Summary: Consumer Perceptions Toward SME**

- Most unaware it exists
  - Concept unfamiliar
  - Programs invisible
- Have not sought out classes
  - Expect doctor would have told them

### **Summary: Consumer Perceptions Toward SME**

- Topics covered and interactive processes in existing programs desirable
- Prefer to hear from “someone like me”

### **How Can We Create More Word of Mouth “Buzz”?**

- Grassroots marketing!

### **Grassroots Marketing**

- Targeted approach to educating members of a population about product or idea
- Conducted by member of community through presentations or one-to-one outreach
- “Sales” force made up of enthusiastic people with experience with the product

### **“Word of Mouth” Marketing...**

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

### **How Can We Create More Word of Mouth “Buzz”?**

- Recruit, train, and support “Ambassadors”

### **What Is an Ambassador**

- Person
  - Who has benefitted from the program
  - Is willing to promote it formally or informally to others they think could benefit
  - A “walking billboard”

### **Keys to Success in Ambassador Outreach**

- Having successful participants who serve as trained ambassadors to promote SME workshops
- Using consumer audience research to shape the “pitch”
- Providing training and ongoing support to ambassadors

### **Two Types of Ambassadors**

1. Person-to-Person Ambassadors
  - One-to-one approach to people they know and think would benefit
  - Outreach to influential others
    - Personal MD, minister, hairdresser

### **Two Types of Ambassadors**

2. Spokesperson Ambassadors
  - Scheduled presentations for community groups
  - Ambassador-identified opportunities in groups she is a member of

### **Characteristics of Ideal Ambassadors**

- Experienced
  - Successfully completed SME workshop
- Enthusiastic
  - A believer in the benefits

### **Characteristics of Ideal Ambassadors**

- **Connected**
  - Lives in community, respected by a wide circle of peers
- **“Wired to talk”**
  - Willing to share experiences
- **Spokesperson**
  - Comfortable speaking to groups

### **Spread the Word: Marketing Self-Management Education Through Ambassador Outreach**

### ***Spread the Word: Components***

- **Coordinators Guide**
- **Handbooks**
  - Person-to-Person Ambassador
  - Spokesperson Ambassador
- **Tools to support Coordinators and Ambassadors**

### **Coordinators Tasks in Ambassador Outreach**

- **Preparing for Ambassador Outreach**
- **Implementing Ambassador Outreach**
- **Evaluating Outreach Efforts**

### **Coordinators Tasks in Ambassador Outreach**

- **Preparing for Ambassador Outreach**
  - Developing work plan
  - Preparing Ambassador tools
  - Recruiting and training ambassadors

### **Coordinators Tasks in Ambassador Outreach**

- **Implementing Ambassador Outreach**
  - Staying in touch
  - Tracking ambassador activity
- **Evaluating Outreach Efforts**

### **Coordinator's Tasks and Tools**

- **Preparing for Ambassador Outreach**
  - **Planning**
    - **Tool: Coordinators Workplan**
  - **Recruiting Ambassadors**
    - **Tools: Job Descriptions**
  - **Training Ambassadors**
    - **Tools: Training Curriculum, Sample Flip Charts**

### **Coordinators Tools**

- **Implementing Ambassador Outreach**
  - **Tool: Ambassador Tracking Spreadsheet**

### **Coordinators Tools**

- **Evaluating your Outreach Efforts**
  - **Tools:**
    - **“How did you Hear?” Tracking spreadsheet**
    - **Ambassador Outreach Evaluation Report Template**

### **Key Steps in Ambassador Outreach**

- **Preparing to be an Ambassador**
- **Marketing SME Workshops**
- **Connecting with your Coordinator**

### **Tools for Ambassadors**

- **Handbook**
- **Outreach Plan**
- **Outreach Report**
- **Talking Points Card**
- **Workshop Information / Schedule Card**
- **PowerPoint Presentation**
  - **Spokesperson Ambassadors**

### **Making the “Pitch”**

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

### Learning for Our Pilot Test

- Conducted July 2011 – April 2012
- Sites:
  - Florida
  - Minnesota
  - Missouri
  - South Carolina

### Pilot Test Activities

- All sites promoted CDSMP
- Number of ambassadors recruited:
  - 4 – 5 per location
- Staff involved: 2 – 8

### Pilot Test Activities

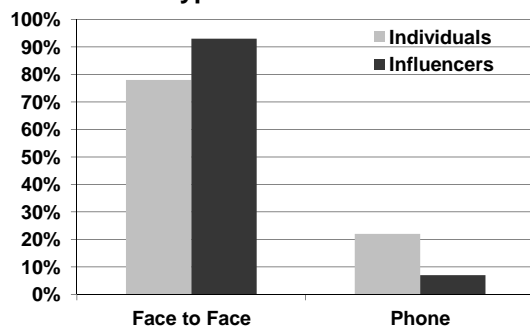
- Location selection criteria
  - Classes cancelled or low registration
  - High minority / disparity populations
  - New workshops in area
  - Organization / staff available to oversee process

### Pilot Test Results

- Contacts made
  - Individuals
    - Average 180 per site (range 4-587)
- Influential persons
  - Average 26 (range 20-36)
- Groups
  - Average 8 (range 1-18)

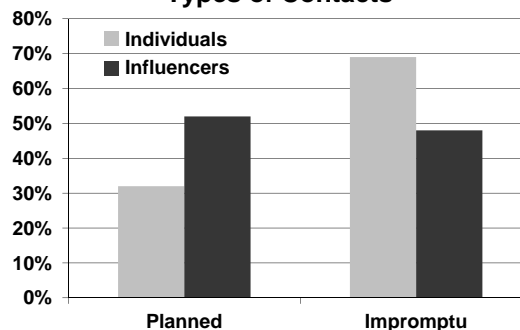
### Pilot Test Results

Types of Contacts



### Pilot Test Results

Types of Contacts





### **Pilot Test Key Learnings**

- **Ambassadors**
  - Gain confidence with experience
  - Outgoing personality key, as is passion for the cause
  - Felt they were successful
  - Are good eyes / ears into the community

### **Pilot Test Key Learnings**

- **The Pitch**
  - Need to repeat several times to get message to stick
  - Emphasize
    - Interactive nature of classes
    - Will receive tips and tools to achieve better quality of life
  - Most recipients appreciated info

### **Pilot Test Key Learnings**

- **The Strategy**
  - Time consuming
    - For ambassadors
    - For coordinators
    - To see results
  - Can help identify unmet needs and logistics challenges

### **Warnings**

- **This is a long-term strategy**
  - Do not expect immediate results
- **This is one element in a multiple-strategy marketing plan**