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TELL YOUR ORGANIZATION'S STORY:

How to craft a marketing plan

When your organization earns accreditation from CARF, CARF Canada, or CARF-CCAC, it sends an important message to the individuals you serve and your community. By achieving accreditation, your organization has demonstrated its commitment to ongoing quality improvement and person-centered services. Your organization has demonstrated conformance to the internationally accepted standards.

Such an achievement deserves to be recognized by others in your community, which contributes to your organization's continued growth and success. Yet recognition does not appear magically. Your organization's services and achievements need to be marketed.

Marketing is how you tell your organization's story, how often it is repeated, to whom it is told, and the results of telling the story.

WHAT IS A MARKETING PLAN?

A marketing plan is the framework for telling your organization's story. The plan includes goals, objectives, and activities to help your organization thrive and expand. A marketing plan can be simple, reflecting a basic understanding of the market and the competition. It can be extremely detailed, with lots of demographic and psychographic data. Or it can fall somewhere in between.

The marketing plan does not stand by itself but is bound closely to and integrated with your organization's mission and its business and strategic plans. Simply put, a marketing plan is a strategy that drives the goals identified in your organization's business and strategic plans, which supports your mission. Integration of the marketing, business, and strategic plans with the mission statement is essential because your organization cannot accomplish its mission without an operating budget, and it cannot grow unless your services generate income.

The marketing plan is not prepared independently of the budget or after the budget is established. Rather, it is the basis for funding decisions, providing the justification for allocating dollars to specific marketing efforts.

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To prepare an effective marketing plan, input should be gathered from relevant stakeholders, such as the persons served, staff members, referral sources, and perhaps the board of directors.

The results of the marketing planning process are diverse. Externally, the marketing plan can raise awareness and attract new customers to your organization. Internally, the plan will generate increased management knowledge and support of marketing goals and results. It will also offer justification of budget expenses in a climate of limited resources.

ANALYSIS IS THE BACKGROUND OF YOUR ORGANIZATION'S STORY

Careful analysis can lead to better planning, and successful marketing efforts are well-planned ones. Before beginning to plot your organization's marketing activities and projecting the results of marketing efforts, you need to analyze your organization's unique identity. With your mission statement as the starting point:

- Describe the services and products your organization provides and the importance of each in your organization's success. Highlight the resources necessary to provide these services and products.
- Compile comparative business data from previous years to gauge growth (or decline) and recognize any market cycles.
- Analyze the characteristics that set your organization apart from competitors and prompt individuals to select (or not select) your services over other options. Consider every variable that distinguishes your services, including philosophy, reputation, experience in the field, financial stability, pricing policy, corporate affiliation, funding sources, location(s), hours of service, physical characteristics, unique features and amenities, and accreditation status.

Define your geographic service area. Do most of the persons served by your organization come from the immediate vicinity or are they willing to travel to your location? Is your geographic service area reduced or enlarged by the proximity of highways and public transportation?

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- Establish a profile of the typical person your organization serves. What are the demographics of individuals who select your services? Consider age, socioeconomic status, education, gender, race or ethnicity, health, and any other variable that might be pertinent. This profile can help target your marketing efforts in your geographic service area.
- Conduct an analysis of strengths, weaknesses, opportunities, and threats (SWOT) to look critically at the marketplace and examine the SWOT that face your organization. This analysis might involve assessing staffing needs, satisfaction of the persons served, and public opinion among other elements.
- Be aware of overall trends in your field and assess the regulatory environment. This awareness can help you foresee future challenges and develop long-range goals.



AN ACTION PLAN UNFOLDS YOUR ORGANIZATION'S STORY

Once your organization determines its customer needs and expectations, understands the characteristics of its market, and completes its SWOT analysis, it can identify goals, objectives, and strategies for attracting new customers and solving marketing challenges. You are on your way to building a marketing plan!

An important component of a marketing plan is an action plan that designates objectives and strategies to help achieve your organizational goals. The action plan will identify:

- Meaningful, attainable objectives.
- A plan of activities to achieve those objectives.
- A target time line for implementing activities.
- The cost and budget required to undertake the activities in the plan.

An action plan also allows your organization to measure results as it moves toward achieving its goals. Once implemented, a marketing plan must be flexible and easily modified to accommodate changes in the market. Your organization will need to develop a regular method for reviewing every marketing activity and strategy to assess its success as part of an ongoing evaluation of the benefit of the dollars invested in marketing.

COMMUNICATION IS THE STORY LINE OF YOUR MARKETING

Communication—the art and science of effectively sending and receiving messages—is essential to telling your organization's story. Successful communication is possible when you:

- Keep messages consistent. Check every message for four important variables: accuracy, consistency, clarity, and appeal. Each telling of the story must paint an accurate, consistent picture. The picture must be clear and must appeal to your audiences.
- Keep the perspectives of your audiences in mind. A story that appeals to one person may require a different angle to resonate with another. Understanding the demographics of the persons served by your organization will help you target your messages consistently and effectively.
- Identify which aspects of your organization are most important in telling your organization's story. Not every organizational service or product deserves equal emphasis.
- Realize that listening to the persons served by your organization helps you understand and meet their needs and expectations. Listening is as important as talking.

Take a broad view of communication. Every action undertaken by your staff—including a follow-up note, telephone call or e-mail message, and face-to-face conversation—is communication. Each impression left with a prospective customer becomes a part of the marketing function. To accommodate this broad view, you will want to develop a multifaceted communications program. Potential communication vehicles include:

- Formal or controlled communications, which might include a promotion or communication campaign. These communications include informational brochures, posters, flyers, newsletters, news releases, print or electronic advertising, videos, slide shows, direct

Each impression left with a prospective customer becomes a part of the marketing function.

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mail, telemarketing, bulk e-mail messages, speaking engagements and group presentations, and a website. (More about promotion and communication campaigns follows.)

- Feedback mechanisms, such as business reply cards in brochures; coupons in ads; and question-and-answer opportunities in newsletters, in person at speaking engagements, or on your website.
- Informal communications. This category includes one-on-one testimonials of satisfied persons served and their families; favorable comments of opinion leaders such as civic leaders, healthcare professionals, and vendors; interactions between satisfied employees and members of the community; relations with the news media; and the influence of corporate staff and the board of directors in the local community. With informal communications, you have limited control of message delivery and must make a concerted effort to obtain feedback, yet your informal marketing needs to be as strong and consistent as formal, controlled marketing.
- Direct experience. This category includes opportunities for any of your target audiences—prospective customers and their families, funders, and opinion leaders—to experience your services. If appropriate, tours of your organization that involve interaction with the persons served can create a more positive impact than tours conducted by your staff alone.
- A web presence, which is increasingly essential for conducting business and can play an important role in telling your organization’s story. Concentrate on making text on the website easy to read and the website easy to navigate so that the most sought-after information can be found quickly. Be sure to provide a vehicle for visitors to ask questions or submit comments. Remember, too, that accessibility of your website for persons with disabilities is as vital to your marketing efforts and reputation as making your physical facilities accessible.

Promotion and communication campaigns

- An advertising plan is essential if you allocate advertising dollars. In an ad campaign, you can determine the best type of media to use and the most cost-effective schedule to follow in communicating with your audiences through print or electronic media. To evaluate the effectiveness of an ad campaign, all responses to that campaign should be monitored.

- A direct-mail approach might be used in lieu of or in addition to media advertising, especially if your organization provides services that individuals plan in advance to use. Direct mail can be at times more targeted and less expensive than media advertising if your organization maintains or rents a beneficial mailing list and receives bulk mail discounts. Direct-mail campaigns can include mailing brochures, newsletters, or invitations to special events. As in media advertising, the evaluation of responses is critical in deciding whether to make an ongoing commitment of funds for direct-mail campaigns. Electronic communications via e-mail, including newsletters, are increasingly prevalent and less costly to produce and distribute than their print counterparts. However, you will want to be sure your recipients are receptive to receiving e-mail from your organization. Unsolicited bulk e-mail, or spam, is generally viewed as intrusive and more annoying than direct-mail advertising.

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Marketing Plan Steps and Templates

MARKETING PLAN STEPS

Analyze your market and resources by:

- Collecting data
- Formulating and examining data

Conduct a SWOT analysis by identifying your organization's:

- Strengths
- Weaknesses
- Opportunities
- Threats

Formulate strategies by:

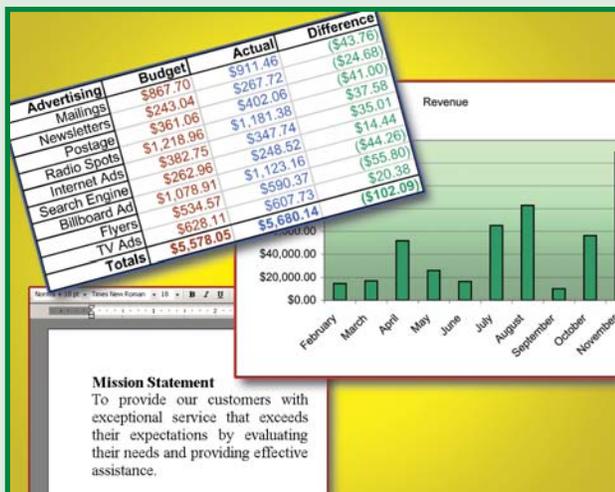
- Identifying key result areas
- Formulating goals and objectives
- Developing an action plan

Prepare and review action plans by:

- Establishing a budget
- Presenting plans to the CEO and board of directors

Evaluate progress in:

- Monthly reports
- Quarterly reports



TWO MARKETING PLAN TEMPLATES

Marketing Plan Template A

I. Introduction and executive summary of SWOT analysis

- A. Mission
- B. Product/service description
- C. Definition of market area
- D. Fee structure
- E. Unique features/amenities
- F. Market share analysis
- G. Customer profile (actual and desired)
- H. Source and activity data

II. Marketing goals and objectives

- A. Long-term goals
- B. Short-term goals

III. Action plans tied to budget

IV. Review of schedule and evaluation procedure

Marketing Plan Template B

I. Marketing philosophy

- A. Mission

II. Primary marketing goals

III. Implementation

- A. Budget
- B. Approval
- C. Responsibility

IV. Action plans

- A. Objective
- B. Plan of actions
- C. Persons responsible
- D. Target dates
- E. Budget allocation



News from CARF

Read more news about CARF at www.carf.org/news

CARF INTERNATIONAL LAUNCHES NEW INTERACTIVE WEBSITE TO ENGAGE PROVIDERS WITH ACCREDITATION

Customer Connect introduces new convenience for providers in managing their CARF survey and accreditation information.

Using a password to securely log on to Customer Connect at customerconnect.carf.org, providers can easily:

- Manage their individual contact information.
- View up-to-date information about their organizations' surveys.
- Access information about the accreditation process.
- View and download documents specific to their organizations.
- Read the latest CARF International news and announcements.

Access to the Customer Connect website is free, but is restricted to providers that are accredited or seeking accreditation from any of the CARF family of organizations, including CARE, CARF-CCAC, and CARF Canada.

“CARF expects providers to continually improve their services with the persons they serve. We at CARF also continually strive to enhance and add value to our relationships with our customers,” said Brian J. Boon, Ph.D., president/CEO of CARE. “The introduction of Customer Connect marks an important step in energizing our interactive communications between providers and CARE. Moreover, it is a technology that our customers can use throughout their accreditation term, not just when they are preparing for a CARF survey.”

Providers' questions and comments about Customer Connect are invited through the online contact form at www.carf.org/providers.aspx?content=pv_Contact

STANDARDS MANAGER™ ORGANIZES CARF SURVEY PREPARATION AND EVIDENCE OF STANDARDS CONFORMANCE

Between 600 and 1,100 standards are applied on an average CARF survey. Demonstrating conformance to each standard challenges providers to carefully organize and manage their survey preparation.

Now providers may more adeptly manage this challenge with Standards Manager™, powerful new software created by Morning Sun Software Development Corporation, which has provided information solutions in the human service field for more than ten years. Providers preparing for their first CARF survey or applying for reaccreditation can both benefit by using this electronic project management tool.

New software guides providers in assigning tasks, tracking progress, and producing status reports.

“Standards Manager is an excellent tool to build a comprehensive package of data and evidence to support conformance to CARF standards,” said Brian J. Boon, Ph.D., president/CEO of CARE. “Providers and CARE

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survey teams alike are finding this software efficiently organizes efforts to demonstrate conformance to standards.”

The software works like this: A user identifies the standards that will be applied on a CARF survey and can assign specific tasks to other staff members. Fields for each standard capture responses and notations, including files that may be attached or copied directly into the software to demonstrate standards conformance. A reader mode allows other staff members within the organization to view the standards and progress of tasks. A status area shows open and closed tasks and the percentage of completion. When satisfied that the survey preparation questions are completed and supporting evidence is linked within Standards Manager™, the user marks the standard or section of standards as closed.

Adding to the flexibility and accessibility of the software, Standards Manager’s reporting options can be viewed on-screen or exported in a variety of formats. The program also equips users with lists of accessibility keys, keyboard shortcuts, and a usage guide.

“We’re honored to have developed this electronic tool to help providers track their conformance to the CARF standards,” said Larry S. Sanders, Ph.D., chairman/CEO of Morning Sun Software Development Corporation. “The CARF accreditation process improves the quality of services, which ultimately benefits the persons served.”

Standards Manager™ can be ordered online at bookstore.carf.org ■■

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