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Washington, D.C.*

*November 16 - 18, 2012*



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*40th Anniversary  
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**Live Demo!**  
Friday: 4:00-5:30 PM  
Meeting Room: 12 & 13 & 14  
Saturday: 3:30-5:00 PM  
Meeting Room: 12 & 13 & 14



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- Marketing Support
- Qualified Instructor Recruiting
- Innovative Curriculum
- Career Services



PROGRAMS	CLASSROOM	ONLINE
Pharmacy Technician	●	●
Clinical Medical Assistant	●	●
Dental Assisting Program	●	●
Medical Billing & Coding	●	●
EKG Technician Program	●	●
Electronic Health Records	●	●
Phlebotomy Technician	●	●
Medical Admin Assistant	●	●
Dialysis Technician	●	●

Classroom programs also include Physician Medical Office Assistant, IV Therapy, Home Healthcare Aide, Pharmacy Compounding & Sterile Prep, Hospital Billing & Coding, Veterinary Assistant Program, Certified Nursing Assistant, Physical Therapy Aide, Chiropractic Assistance, Ophthalmic Assistant, Medical Manager Program, Patient Care Technician/Assistant, and many more!

**\* Note: Certain classroom and e-learning programs also include clinical externships!**

Talk to us about how our flexible model provides for the ability to create solutions that meet your workforce development, staff training, or student education needs.

### For more information:

call **Brian Nevius** at **877-232-4590**  
or email [briann@condensedcurriculum.com](mailto:briann@condensedcurriculum.com)

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Dan Belhassen,  
Founder & CEO

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\* Provide your name / phone / email address and a potential date for us to call you. We'll confirm by email and reschedule if needed – discount offer expires on Dec. 31st 2012 if our initial free consultation conversation is not held before that date.



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"We had a few students doing their internship here and hired one of them. We believe it has been a positive experience. Yes, I would recommend the program to others. The combination of classroom lectures and practical lab time give students a better experience than just home study and written exam."

*Rom Vinhaes, Training Coordinator*

Boroughs Family Branch - YMCA of Central Massachusetts

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*Christine Salvardos, Wellness Director*

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Tania Hooper - Director of Partnership Development

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## Lifelong Learning 2012 Exhibitors

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### Platinum Exhibitors



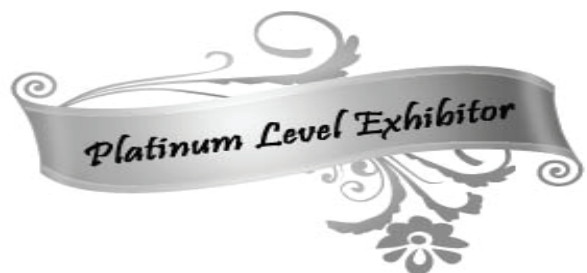
Augusoft® develops and maintains Lumens®, the first cloud-based (SaaS) enrollment management system designed for the continuing education industry. With Lumens, continuing education programs manage their open enrollment, certificate programs, workforce development, and corporate education businesses all in one system. Visit [www.augusoft.net](http://www.augusoft.net) to see Lumens in action.



XenDirect by Xenegrade Corp is a powerful and flexible 100% web-based solution to manage all your data in one, integrated system. No matter what type of organization you are, if you manage student, client, registration, scheduling, grading, reporting, workforce development, conferences, or job placement data, XenDirect is your total solution.



Boston Reed partners with adult schools, community colleges, and universities to add hybrid, online and in-classroom instructor-led allied health training programs to their fee-based catalog. For over 20 years, we've provided creative solutions to grow educational organizations with low financial risk and sizable profits. We provide students with the most advanced healthcare training at the lowest price designed for the busy adult.



- more exhibitor info on the next page

## Lifelong Learning 2012 Exhibitors

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Since 1993, CCI has been supporting innovative allied healthcare training. Now partnering with over 300 colleges, universities, and high schools nationwide, CCI supports classroom-based and online eLearning courses in Pharmacy Technician, Clinical Medical Assistant, Dental Assistant, Medical Billing and Coding, and other leading healthcare program services – [www.condensedcurriculum.com](http://www.condensedcurriculum.com).

### Gold Exhibitors



Modern Earth Web Design invites you to visit our booth, and meet session presenter Dan Belhassen to discuss how to maximize your online presence. Since 1999, Dan and his team have established Modern Earth as an industry leader in comprehensive online business solutions – from email marketing to custom website design to SEO and online marketing.



MK Education is an education consulting company that provides curriculum, job readiness skills, allied health training, and professional coaching with hands-on-training throughout the program with our college partnership collaboration. Our partners encompass all the individuals that can assist us in achieving the MK Education goal to enhance the profitability structure and focus on student job success through empowered training.

- more exhibitor info on the next page

## Lifelong Learning 2012 Exhibitors

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### Silver Exhibitors



**"Educational Excellence  
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W.I.T.S. educational partnerships lead the fitness industry in higher learning educationally based training, which results in national certification. No upfront costs as we teach it, test it and issue the results. W.I.T.S. is employer driven and one of the most accepted in the fitness industry. W.I.T.S. is approved for college credits and offers a 9 week & blended/hybrid certifications. W.I.T.S. is also approved for CEU's for occupational therapists, massage therapists and athletic trainers.



### Premier Exhibitors



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### Other Exhibitors



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## Lifelong Learning 2012 Exhibitors

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ASAP is an innovative online registration and management system popular with continuing and community education providers across the US and Canada. Easy and affordable to use, our paperless, web-based services cover credit and noncredit programs. Learn more about our “game-changer” registration software at [www.asapconnected.com](http://www.asapconnected.com)



CourseStorm makes online course registration impossibly simple. Just send us your catalog and within a few days, you're taking online registrations -- credit cards included. We handle the website and credit card processing, so you can focus on managing your program.



EBRC is a national provider of primarily instructor led, custom training classes. We only work with colleges and universities, never directly with businesses.

Our extensive list of courses allows our College Partners to augment and expand their curriculum to better meet the needs of their business Clients. The Result: An Increase in the Community's Intellectual Capital.

*- more exhibitor info on the next page*

## Lifelong Learning 2012 Exhibitors

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DATA to DESIGN is a training & design service developed by graphic designer Mary Lynch to provide education programs with creative solutions for producing print materials efficiently — using their data-base content. Mary has produced over 100 catalogs for lifelong learning programs, and she has trained 20 learning programs and institutions to generate their promotional materials more efficiently.



Development Dimensions International (DDI) offers award-winning courses in leadership, behavior-based interviewing and customer service from workforce through mid-management levels. Curriculum is flexible, allowing customization to meet the needs of your college staff or external business clients. DDI's programs have been used by the world's leading companies with proven ROI. Contact DDI Education Partners at 412-257-3902.



Education to Go (ed2go)

Education To Go (ed2go) is the leader in the online continuing education and career training markets. Our ever-growing catalog of Online Instructor-Led Courses and Career Training Programs provides students online learning solutions for professional and workforce development, continuing education, career skills training, certificate programs, and personal enrichment.

*- more exhibitor info on the next page*

## Lifelong Learning 2012 Exhibitors

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Entrinsik's Semtek Registration Software features a robust Shopping Cart and intuitive Reporting and Dashboards using Informer, providing Professional and Continuing Education organizations with comprehensive solutions improving daily operations and increasing revenue.

Entrinsik, founded in 1984, is headquartered in Raleigh, NC. Visit [www.entrinsik.com](http://www.entrinsik.com), call 888-703-0016, or e-mail us at [sales@entrinsik.com](mailto:sales@entrinsik.com).



EVERYTHING  
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Everything Marketing

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We do it all...From Graphic Design, Print and Mail...to Store Signage, Websites and Commercials...

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For 10 years, Funutation Tekademy LLC continues to make tech fun for kids. Through after-school tek camps, in-home tutoring, summer tek camps and even school district programs kids experience how to make computer games, build mobile apps, program battle robots, and more!! Energetic and entertaining hands-on Tek Labs are led by skilled Tek Leaders nationwide.

*- more exhibitor info on the next page*

## Lifelong Learning 2012 Exhibitors

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We offer practical items as well as ones that are new and different. Your choice!

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Labyrinth Learning publishes engaging, easy-to-use textbooks and combines them with instructor support materials and innovative online tools to create true learning solutions for community colleges, vocational/technical schools, and other educational programs. Get the full story at [www.lablearning.com](http://www.lablearning.com)



The LERN Booth has all the latest details and updates on LERN's products and services! Become a LERN member, update your current membership information, or grab a copy of one of LERN's member magazines. Ask LERN's experts your questions, or bring your brochure to request a critique. Stop by today!

*- more exhibitor info on the next page*



## Lifelong Learning 2012 Exhibitors

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LWPI is the industry leader in certificate programs for students getting started in the event industry and professionals looking to expand their expertise. Colleges can offer a variety of turn-key courses both in-class and online; such as, Corporate/wedding/event management, floral design, as well as food and wine, table etiquette, and many others. Visit [www.theweddingplanninginstitute.com](http://www.theweddingplanninginstitute.com) or call 1-888-221-9988.



MindEdge, an innovative online learning company, provides engaging and effective online courses and simulations. We partner with colleges, universities, and associations to offer top-notch professional development solutions and college-level courses. Our online programs feature narrative learning and employ diverse content delivery methods to ensure your learners will really learn.



The National Institute for Social Media (NISM) is dedicated to providing professional social media education and certification. We use the knowledge and experience of a committee of industry advisors to develop social media educational standards, which are used by educators, organizations and students to validate the core skills necessary for success in the world of social media.

*- more exhibitor info on the next page*

## Lifelong Learning 2012 Exhibitors

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OnCourse Learning is an education and compliance solutions provider for individuals, companies, educators, and government agencies seeking educational excellence, professional compliance, occupational tools, customized training solutions, and new careers.



ProTrain, LLC, is dedicated to quality educational services at an affordable cost, in the classroom or online, ensuring success in the workforce through the active engagement of direct relationships with universities, community colleges, educational entities, corporations, non-profits and the military community throughout the United States and internationally.



The Center for Legal Studies is a legal education company focused on providing students the most affordable and effective legal education possible. We deliver our curriculum in several formats through hundreds of colleges and universities nationwide in order to provide our students with the flexibility necessary to achieve their academic goals while continuing with their everyday lives.

*- more exhibitor info on the next page*

## Lifelong Learning 2012 Exhibitors

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Distinguish yourself in the field of Event Management

Learn the tools and practical aspects of event and meeting management. Content includes research, design, planning, coordination, site analysis, contract negotiation, feasibility studies and evaluation of events and meetings. Learn best practices in promotion, organization and risk management for seminars, conventions, conferences, trade shows, expositions, and special events of all sizes.

The George Washington University School of Business — Event Management Certificate Program  
[www.gwutourism.org/eventmanagement](http://www.gwutourism.org/eventmanagement)



UNIVERSITY OF  
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The Learning Resources Network (LERN) and the University of South Dakota are pleased to offer a Master of Arts in Educational Administration, with an emphasis in Adult and Higher Education. This degree is awarded by the University of South Dakota.

The Master of Arts in Educational Administration, with an emphasis in Adult and Higher Education, is a distinctive master's degree that combines the academic, theoretical and research findings of adult and continuing education with the practical application of the responsibilities and duties of adult and continuing education administrators.

This unique program has been designed at the request of adult and continuing education administrators interested in receiving graduate credit by combining the practical, professional education that LERN offers with essential academic education from The University of South Dakota, a highly respected higher education institution.

The combination of USD curriculum and LERN institutes and courses allows working professionals to gain extensive knowledge in the area of adult and higher education, as well as to obtain practical tools that are applicable and beneficial to their organization.

*- more exhibitor info on the next page*

## Lifelong Learning 2012 Exhibitors

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Get skills for the 21st century. Demonstrate your knowledge. Boost your productivity and your organization's bottom line.

Online learning is easy. It's fun!

Our online certificates and courses are provided by quality colleges and associations with expert instructors. Participate anytime day or evening, from any computer.



# Lifelong Learning 2012

## Concurrent Session Handouts

### Friday November 16

#### 10:20 - 11:10 am

5 Core Marketing Concepts	Rick Walsh	1
Email Marketing Success	Dan Belhassen	6
Event Planning 101	Kassia Dellabough	20
Inbound Marketing	Suzanne Kart	30
New Growth Markets	Heather Dimitt, Wendy Evers, etal	37
Why Winners Win	Greg Marsello	43

#### 11:20 - 12:10 pm

Building the Right Product Mix	Greg Marsello	46
Living in a Cloud	Dan Belhassen	49
New Twitter Ideas	Suzanne Kart	52
Programming for Twenty Somethings	Heather Dimitt	62
Promoting Online Courses	Stephanie Bowlin, Kat Cannella, etal ...	68
Ratios for Success	Fred Bayley	73

#### 2:00 - 2:50 pm

10 Best Promotion Strategies of the Year	William Draves, Paul Franklin & Suzanne Kart	80
Building Your Strategic Plan	Greg Marsello	85
Generational Communication in the Workplace	Kassia Dellabough	89
Online Advertising with Google and Facebook Ads	Dan Belhassen	103
Pricing to Improve Profit Margins	Fred Bayley	112

#### 3:00 - 3:50 pm

10 Steps to Improved Profitability	Joe Miera	118
30 Best Operations	Greg Marsello	132
Building New Courses	Fred Bayley	134
Creating Hybrid Courses	Kassia Dellabough	139
Education in the 21st Century	William Draves & Julie Coates	149
Marketing Youth Programs	Heather Dimitt	152
Needs Assessment	Rick Walsh	158
Partnerships to Grow Your Program	Rob Watters & Dori Marty	164
Pinterest & InfoGraphics	Suzanne Kart	174

### Saturday November 17

#### 8:00 - 8:50 am

7 Essential Ingredients of Successful Facebook Business Pages	Jennifer Selke	185
Best Web Sites of the Year	Suzanne Kart	187
Building Support for the Field	Rita Martinez-Purson	196
Data to Collect, Reports to Run	Greg Marsello	203
Promotion Techniques That Work	Rick Walsh	205



# Lifelong Learning 2012

## Concurrent Session Handouts

### Saturday November 17, continued

#### 10:20 - 11:10

8 Best Practices for Listening & Engaging Consumers in Social Media	Jennifer Selke	209
A Dozen Tricks of the Trade from the Sales Pro	Rick Walsh	211
Best Brochure Ideas for 2012	Nancy Hulverson	216
Creating Mobile Apps	Dan Belhassen	222
Improving Quality	Fred Bayley	226
Increasing Staff Productivity	Greg Marsello	237

#### 11:20 - 12:10 pm

10 Strategies to Increase Income in 2013	Julia King Tamang	243
Beyond Email & Facebook	Jennifer Selke	245
Creating Winning Initiatives	Greg Marsello	247
Customer Retention: Key to Growth	Fred Bayley	252
Fatal Leadership Errors	Henry Findlay	258
Make Your Program Essential	Julie Coates	265
Writing Effective Email Promotion Copy	Suzanne Kart	281

#### 2:00 - 2:50

10 Sales Mistakes That Can Sink Your Ship	Rick Walsh	290
Mid-Career, Now What?	Suzanne Kart	297
Overcoming Social Media Excuses	Jennifer Selke	304
Program Development Tools	Fred Bayley	306
Stomping the Competition	Paul Franklin	312
The Skills of Influence: Enlisting Others to Accomplish Key Goals	Julie King Tamang	321
Winning With Advisory Boards	Greg Marsello	327

### Sunday November 18

#### 8:00 - 8:50 am

Enrollment Analysis	Fred Bayley	330
How Cut Brochure Costs	Nancy Hulverson	333
LERN Software	Greg Marsello	341
Pack More Income & Opportunity into Every Contract	Julia King Tamang	343
Social Media 101	Suzanne Kart	349
Your One-Year Marketing Plan	Paul Franklin	358

#### 9:00 - 9:50 am

Got Humor?	Fred Bayley	366
How to Escape the Stuff of the Past	Julia King Tamang	369
Passion & Purpose: Keeping the Vision Alive	Rita Martinez-Purson	376
Nine Shift for 2013: The Great American Comeback	William Draves	381



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### 5 Core Marketing Concepts

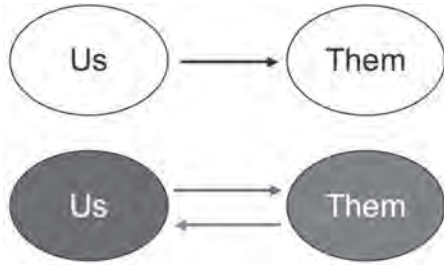
Rick Walsh  
Consultant  
LERN  
Virginia Beach, VA

**1. Goal of Marketing**

The primary goal of marketing is to establish a positive image and relationship with your present & potential participants.

**Products to Customers Shift**

We manage customers not products.



**Everything We Do is Marketing**

For example:

- a. The facility where you hold your courses
- b. The way you reject potential teachers
- c. How you say “hello”
- d. Your hold button: How long is someone on hold? Is there music? What kind?
- e. Your course selection
- f. Your registration process
- g. Your website
- h. The shopping cart

**2. New Customers Are More Expensive**

Six Times More Expensive to Get a New Customer

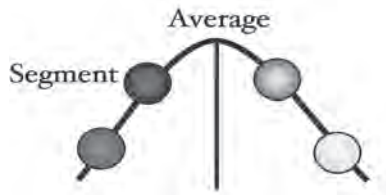
Mailing	Response Rate	Regis-trations	\$ per Customer
6,000 past participants	6.00%	360	\$4.17
30,000 new participants	1.00%	300	\$25.00
36,000 total	1.83%	660	

The cost of each promotion is \$.25



### 3. Segment the Market

You want to segment the market because you serve some, but not all, demographic groups.



There is no average participant. Averages lump your customers. They do not differentiate your segments. There is no individual customer data. We now need individual data.

### Market Segmentation

A process by which you

- Differentiate your top customer groups,
- Build a separate demographic profile,
- Deliver different products
- Use different promotions to different market segments

### 7 Segments

As you analyze your best customers by their demographics, you will find they fall into a few market segments. This is usually seven different market segments. Each segment will be defined by at least two demographics.

	Retirees	Single Soldiers	Children	Civilians	Spouses	Contractors	Tenants
Outdoor Recreation	✓	✓			✓		✓
Auto	✓	✓			✓		✓
Arts & Crafts	✓	✓	✓	✓	✓		✓
Sports & Athletic Training	✓	✓			✓	✓	✓
Music & Theater	✓	✓		✓	✓	✓	✓
Library	✓	✓	✓		✓		✓
Recreation Center & ITR	✓	✓	✓	✓	✓	✓	✓

## **Critical Customer Demographics**

### **Community Courses**

Geography \*

Age \*

Sex

Formal Education

\* Most important demographic characteristics for community programs

### **Continuing Professional Education**

Geography \*

Occupational Specialty \*

Job Title

Size of Company (in dollars or number of employees)

\* Most important demographic characteristics for work related programs

## **4. Direct Marketing**

Direct marketing can be measured so you can find out what does and doesn't work.

Direct marketing can be:

- Measured
- Tracked and quantified
- Tested

### **EXAMPLE: Major brochure cover change**

Options:

1. Just do it. I know best and my graphics person agrees with me.
2. Split test new concept against the old and see which one works the best.
3. Focus group.

### **EXAMPLE: Title for new certificate program**

Options:

1. Staff brainstorm and I pick the best.
2. Survey "best" customers, quantify the results and use the one rated the highest.

### **Direct Marketing Data to Examine**

- a. Collect brochure response rates & analyze the results.
- b. Analyze responses for different dates mailed or e-mailed.

- c. Analyze mix of media.
- d. Analyze days of the week.
- e. Analyze venues.

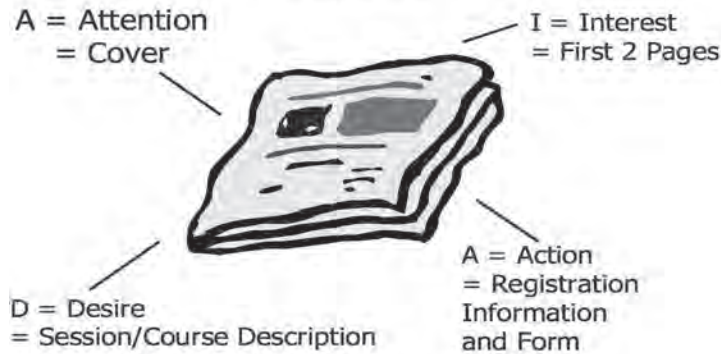
**Direct Marketing Benefits**

- a. Make it more science than art.
- b. Take away some of the risks.
- c. Reduce stress.
- d. Make you more money.
- e. Lead to happier and more satisfied customers because you better appeal to them and their interests and needs.

**3-30-3 Rule**

3 seconds, *Grab Attention* - outside  
 30 seconds, *What's in it for me?* - pages 2 & 3  
 3 minutes, *Action* - inside

**AIDA**



**5. Market Affectively**

You want to create a feeling about your program through your promotions. Look to market to people's emotions and feelings, not just their heads. Market affectively not just cognitively.

**Establish a Position in Your Participants' Minds**

Your program's name  
 LERN

A slogan  
 "Information That Works!"

A logo





## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

---

### Email Marketing Success

Dan Belhassen  
Modern Earth  
Winnipeg, MB

Email Marketing W5

Dan Belhassen  
greatBIGnews.com

About your presenter

- Dan Belhassen
  - Founder and President of Modern Earth Inc., an Internet technology company
  - Website creators, online software developers, search engine consultants, mobile app developers, elearning specialists, new media marketing specialists
  - Find me in my booth if you want to follow up
  - Presentation available at <http://modernearth.net/lern2012>

WHY  
WHAT  
WHO  
WHEN  
HOW


WHY EMAIL MARKETING

WHY

Just in time  
Direct Marketing  
Low Cost  
Quick Response  
Rapid Changes  
Cheap

WHY

But.. I heard that email was dead?



WHY

Email has replaced traditional mail.

Still most popular "long form" option.



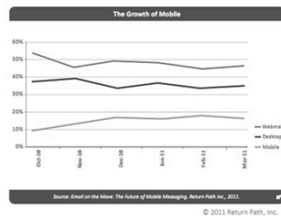
WHY

Email is still highly effective.



WHY

Email usage is holding steady.



WHY

"Consumers who subscribed to email newsletters generated 34.25% more product."

"66% of those surveyed said they had made a purchase because of a marketing message received through email."

"The vast majority of responding companies (72%) rate email as 'excellent' or 'good' for return on investment."

WHY

Should form part of your marketing toolkit.

Along with...

WHY

Should form part of your marketing toolkit.

Along with...



## WHO TO SEND TO

WHO

Related organizations  
Community leaders  
Interested parties  
Potential students  
Past participants  
Local media

## WHAT TO SEND

WHAT

“Seven in 10 US Internet users said **they judged these “from” and “subject” lines** when deciding whether to report an email as spam.”

“55.9% of respondents cited knowing and **trusting the sender** as the primary reason for opening an email.”

“79% of the respondents said they hit the “report spam” button **when they don’t know** who the sender is”

“Including the company name in the subject line **can increase open rates** by up to 32 percent to 60 percent over a subject line without branding.”

WHAT

from

subject

No Entry

WHAT

### What Kinds of Subject Lines Most Attract Your Attention?

- 55.2% - Clearly State the Offer
- 49.6% - Discount or free shipping
- 48.8% - Brand name or sender
- 33.8% - Curious
- 30.3% - Promise immediate answers (download or survey)
- 18.7% - Short
- 15.2% - Promise to solve a specific problem
- 14.1% - Funny
- 11.0% - Has my name in it

WHAT

Subject lines that will motivate opening:

Discounted Price	72.5%
Free shipping offer	60.1%
Special offer mention	37.4%
Specific brand mention	26.9%
Time-based deadline	21.4%
My name	4.3%

WHAT

Product information in retail emails that will motivate clicks

Displaying price	62.7%
Photo of product	61.7%
Delivery information	43.7%
Brand name	42.4%
Displaying dollar savings	36.1%
Brief description	36.1%
Displaying % savings	24.3%

WHEN TO SEND

WHEN

Time of day online users check personal emails at work

Sporadically	47%
First thing in morning	25%
At lunchtime	18%
During afternoon break	8%
Right before end of day	2%

WHEN

When online users check their email

First thing in morning	41%
Right after dinner	18%
Right after work	14%
Right before bed	14%
Middle of night	40%

WHEN

Where online users check their email

In Bed	23%
In class	12%
In a business meeting	8%
Wi-Fi hotspot	6%
Beach or pool	6%
Bathroom	4%
While driving	4%
Church	1%

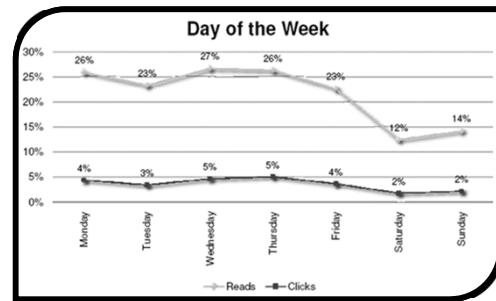


WHEN

How often moms would like to be notified by retail emails

Daily	3.6%
Weekly	35.3%
Bi-Weekly	22.6%
Monthly	32.9%
Quaterly	2.6%
Annually	1.5%
Other	1.5%

WHEN



WHEN

You must  
EXPERIMENT and DISCOVER  
When is the best time to have  
your audience  
TAKE ACTION

HOW TO SEND

#1 Create Targeted Lists

#1 Create Targeted Lists

- Don't just have one large list!
- Target your best (repeat) customers
- They are most likely to re-enroll with you

## #1 Create Targeted Lists

- Separate list based on interest area
  - Attended a course category in last 24 months
    - Computer, photography, gardening, business, health
- or separate by demographic
  - Senior, Youth, Family
- Or both!

## #1 Create Targeted Lists

My Campaigns	304	🗑️ 📄 📊
📧 Email	351	🗑️ 📄 📊
📧 Business & Career	879	🗑️ 📄 📊
📧 Dance (Ballroom)	96	🗑️ 📄 📊
📧 ELI-English Language	25	🗑️ 📄 📊
📧 FreeHandDrawing	2,275	🗑️ 📄 📊
📧 Just for Children	739	🗑️ 📄 📊
📧 Language	207	🗑️ 📄 📊
📧 Literature	12	🗑️ 📄 📊
📧 Medical	121	🗑️ 📄 📊
📧 Meeting Planners	328	🗑️ 📄 📊
📧 Music	479	🗑️ 📄 📊
📧 Online	242	🗑️ 📄 📊
📧 Personal Interest (L...	559	🗑️ 📄 📊
📧 Photoshop Interest	50	🗑️ 📄 📊
📧 PhotoShow	68	🗑️ 📄 📊
📧 Quarterly Newsletter	228	🗑️ 📄 📊
📧 Real Estate	296	🗑️ 📄 📊
📧 SACCA	205	🗑️ 📄 📊
📧 Sewing / Crafts	64	🗑️ 📄 📊
📧 TourGuide Interest	222	🗑️ 📄 📊
📧 Visual Arts / Photo...	575	🗑️ 📄 📊
All Campaigns	8,395	

- Sample "General" template



- Sample "GenX" template



- Sample "GenY" template



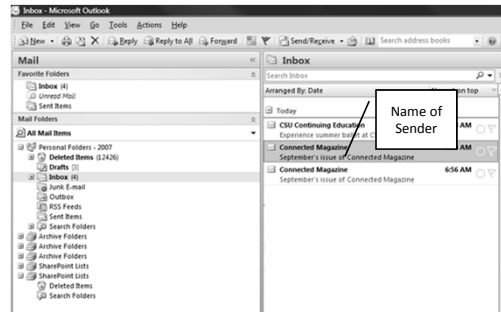
## #2 Maximize Opens

- The "open decision" will be based on
  - The From address / Identity
  - The subject line

## #2 Maximize Opens

- From Address
  - Composed of a NAME and EMAIL ADDRESS
  - Usually only the name will be visible
  - Clearly identify who you are
  - Critical for credibility

## #2 Maximize Opens



## #2 Maximize Opens

- Assuming credibility is established...
  - The subject line says what the message is about
  - Make it clear enough to help the receiver delete it
    - WHAT? Yes!
    - They should be trained that the subject line is directly related to content
    - Overall open rates will improve over time
  - But what makes a good subject line?

## #2 Maximize Opens

- But, why guess when you can measure?
- Take 25% of your list and divide into A/B groups
  - Send subject 1 to group A
  - Send subject 2 to group B
  - Send the “winning” subject line to the remaining group

## #2 Maximize Opens

- But, why guess when you can measure?
- Take 25% of your list and divide into A/B groups
  - Send subject 1 to group A
  - Send subject 2 to group B
  - Send the “winning” subject line to the remaining group
- Use your statistics to improve your success

Meeting Planners	Don't Miss It - Time Management for Event Planners	04/29/08 08:00 AM	315	53
Meeting Planners	Event Planners Luncheon on May 21: Time Management	04/23/08 09:00 AM	316	72

## #2 Maximize Opens

- But, why guess when you can measure?
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Meeting Planners	Don't Miss It - Time Management for Event Planners	04/29/08 08:00 AM	315	53	17%
Meeting Planners	Event Planners Luncheon on May 21: Time Management	04/23/08 09:00 AM	316	72	23%

## #2 Maximize Opens

- Which are better for your audience?
  - Specific deadlines
  - Price (eg: discounts)
  - Urgency
- Don't miss out on great fall courses! OR
- Fall course calendar now available

## #3 Use "calls to action"

- Tell your subscriber what to do!
- Clearly communicate the next action they should take

## #3 Use "calls to action"

Continuing Education  
COLUMBUS STATE  
COLUMBUS, GEORGIA  
Invest in Yourself!

You can spend a magical summer dancing with the Columbus Ballet Conservatory.

Fill your summer with magic and fun. The second week of intensive workshops begins on June 9th led by Kathleen Duffy, former principal soloist with Canada's Royal Winnipeg Ballet.

Then get ready for:

- Our Comprehensive summer ballet program (Ages 3-Adult)
- A 6-week series of sewing classes just for dancers beginning June 16

Click here for more information on these exciting programs. Be sure to register your child early while space is still available. Call 706.507.8070.

Phone: (706) 369-2033 | Fax: (706) 369-2133 | Email: [continuing@colostate.edu](mailto:continuing@colostate.edu) | Web: [www.colostate.edu](http://www.colostate.edu)

Subscribe to other Continuing Education interest based lists

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Subscribe to other Continuing Education interest based lists

Everything on one page

Classy art

- 1
- 2
- 3

## #4 Targeted Follow ups

- Most email marketing systems will provide
  - Everyone who opens a promo
  - Everyone who clicks on a link
- Create a follow up list based on opens and clicks
  - Send a targeted follow up

- Sample initial promo



#### #4 Targeted Follow ups

- Sample follow up



#### #5 Measure Results

- Most systems will provide a reporting mechanism
- See which promos have gotten better results
- Example why that is
  - Try A/B testing with different content

#### #6 Track Conversions

- There are three main conversion steps
  - Are you tracking each step?
- Click-through > website
- Website > registration form
- Registration form > submission

#### #6 Track Conversions

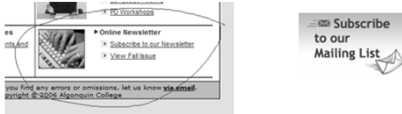
- Ultimate conversion tracking
  - Tie your email marketing to Google Analytics
  - Use conversion tracking tool
  - Will show you which links ultimately generated ROI

Lifelong Learning / Recreation Program

### SAMPLE MARKETING PLAN

### Preparation

- Promote list through website
  - Show example of past editions
  - Ask for as little information as possible
  - Set expectations on frequency



### Preparation

- Promote newsletter through brochure
  - “Want to learn about new courses? Sign up online!”
  - “Learn about hot new courses first with our email alerts!”
  - “Enter to win your course for free at www...”

### Preparation

- Provide an incentive
  - Draw or contest
    - One “reader” per month wins?
    - One “new subscriber” per month wins?
  - Free course? Gift certificate?

### Preparation

- Train staff
  - “Always be asking” for permission
  - How to handle questions
- Modify procedures
  - Opportunities to gain permission
  - Phone calls, course evaluations, registration methods

### Preparation

- Record of all email promotions
  - Print outs of promotions
  - Indication of subject line, open rate, CTR
  - ROI (number of registrations)

### Sample Marketing Plan

- Community/Recreation Program
- Assuming you are starting “from scratch”

## August

- First week (6 weeks out)
  - Mail brochure
  - Sent first email announcing brochure
- Third week (4 weeks out)
  - Mail brochure 2<sup>nd</sup> time to past participants and inquiries
- Third to Fourth week (3-4 weeks out)
  - Emails spotlighting new courses

## September

- First Week (1 week out)
  - 3<sup>rd</sup> email send out
  - Low enrollment classes emailed to best customers
  - Send email about popular classes
- Second week (0 weeks out)
  - Classes start
- Weekly promotions while classes are starting

Professional Development / Seminar / Conference

## SAMPLE MARKETING PLAN

## Sample Plan

- 14 weeks out
  - First brochure mailed
- 10 weeks out
  - Brochure mailed 2<sup>nd</sup> time to frequent customers
- 6 weeks out
  - Brochure mailed 3<sup>rd</sup> time to best customers.
  - First email sent out

## Sample Plan

- 4 weeks out
  - 2<sup>nd</sup> email to best customers, and prospects in immediate area
- 2 weeks out
  - 3<sup>rd</sup> email sent out
- 1 week out
  - Test a fourth email to those in immediate area who are best clients

## HOW SPAM FILTERS WORK

### How SPAM Filters Work

- Thousands of anti-SPAM systems
  - Scored (ie: SpamAssassin)
  - Learned (ie: uses Bayesian Algorithm)
  - Challenge/Response (ie: SpamArrest)
  - Greylisting (ie: greylisting.org)
  - Human Rated (ie: Cloudmark)

### Avoid being labeled as SPAM

- Properly setup email server
  - Dedicated IP address
  - Reverse IP DNS entry
  - SPF (Sender Policy Framework) DNS entry

### Avoid being labeled as SPAM

- Properly setup email server
  - Dedicated IP address
  - Reverse IP DNS entry
  - SPF (Sender Policy Framework) DNS entry

### Avoid being labeled as SPAM

- “Polite” email server
  - Limit total email volume upon request
  - Limit emails sent “per connection”
- Remove invalid email addresses
  - Limit undeliverable emails

### Avoid being labeled as SPAM

- Words to Avoid?
 

<ul style="list-style-type: none"> <li>– Free!</li> <li>Call now!</li> <li>Discount!</li> <li>You're a Winner!</li> <li>Information you requested</li> <li>Million Dollars</li> <li>Removes</li> <li>Cash Bonus</li> <li>Loans</li> <li>Search Engine Listings</li> <li>All Natural</li> <li>Buy Direct</li> <li>Consolidate Your Debt</li> <li>Get Paid</li> <li>Give it away, Giving it away</li> <li>MLM</li> <li>Online pharmacy</li> <li>Please Read</li> <li>Time limited</li> <li>Viagra</li> <li>Why pay more?</li> <li>You've been selected</li> </ul>	<ul style="list-style-type: none"> <li>50% off!</li> <li>Subscribe</li> <li>Eliminate Debt</li> <li>Reverses Aging</li> <li>"Stop" or "Stops"</li> <li>Opportunity</li> <li>Collect</li> <li>Promise You</li> <li>Satisfaction Guaranteed</li> <li>Act Now!</li> <li>Avoid Bankruptcy</li> <li>Casino</li> <li>Special Promotion</li> <li>Guarantee, Guaranteed</li> <li>Join millions</li> <li>No cost, No fees Offer</li> <li>Online marketing</li> <li>Don't Delete</li> <li>Unsecured debt or credit Vacation</li> <li>Visit our web site</li> <li>Winner</li> </ul>	<ul style="list-style-type: none"> <li>Click Here</li> <li>Earn \$</li> <li>Double your income</li> <li>"Hidden"</li> <li>Multi level Marketing</li> <li>Compare</li> <li>Amazing</li> <li>Credit</li> <li>Serious Cash</li> <li>All New</li> <li>As Seen On...</li> <li>Cash</li> <li>Easy Terms</li> <li>Great offer</li> <li>Meet Singles</li> <li>One time</li> <li>Order Now</li> <li>Save up to</li> <li>While Supplies last</li> <li>Work at home</li> </ul>
---	--	---

## SELECTING A SYSTEM



## Selecting a system

- Key features
  - Deliverability
  - Tracking (opens, click-throughs)
  - Import subscribers & prevent duplicates
  - Capture email from website
  - Send to a friend w/self sign up option
  - Design matches your branding

Thank you!

greatBIGnews.com  
modernearth.net



Presentation available at <http://modernearth.net/lern2012>



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### Event Planning 101

Kassia Dellabough  
Consultant  
LERN  
Eugene, OR

## Event Planning 101 November, 2012

Presented by  
Kassia Dellabough, PhD

Senior Consultant, LERN  
Event Planning Trainer, George Washington University  
Director, University of Oregon



1

## Your Goals Today

Take 2 minutes



share with the person to your right 1 reason  
you came and 1 goal for this session that  
would make it worth your time

2

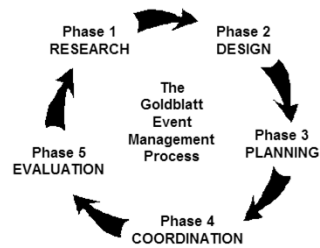
## Agenda

- Event Planning Overview
- Budgeting
- Program Development
- On-site Logistics
- Food & Beverage – Menu Planning
- Site Selection
- Contracts & Negotiation...RFP's
- Risk Management
- Evaluation
- Wrap-up Q &A



3

## Event Planning Cycle



From George Washington University Event Management Certificate Program

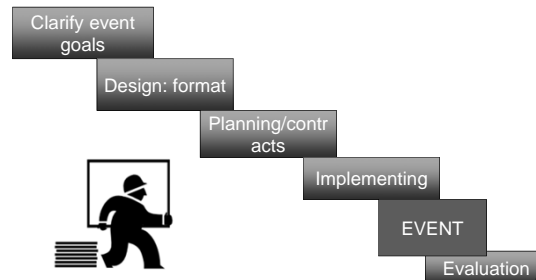
4

## Event Planning Overview

- **Research:** goals and objectives for the event
- **Design:** budgeting, program, site selection
- **Planning:** logistics - on-site and off-site, contracts, schedules, registration, speakers
- **Coordination:** speakers, presenters, vendors, staffing, implementation
- **Evaluation:** attendees, presenters, internal

5

## Event Management Timeline



### What's the difference?




- **EVENT** = 
- **MEETING** = 
- **CONVENTION** = 
- **CONFERENCE** = 
- **FESTIVAL**

### Types of Events

1. List all the types of events you can think of...
2. What are the core components shared by all?

### Budgets & Billing

- Budget supports the objectives of the program.
- Allocation of funds to key objectives.






- Proper payment of bills is just as important as proper budgeting.

Expense Categories	Description of Expense	Budgeted Expenditure	Actual To-Date	Actual Expenditure	Budget to Actual Variance	Justification for Budget to Actual Variance
<b>CONFERENCE AIR TRAVEL (19%)</b>						
DL CODE:						
	Airfare	\$	\$	\$	\$	
	Charters	\$	\$	\$	\$	
	Site Inspections	\$	\$	\$	\$	
	<b>TOTAL CONFERENCE AIR TRAVEL</b>	\$	\$	\$	\$	
<b>CONFERENCE GROUND TRANSPORTATION (7%)</b>						
DL CODE:						
	Airport Transfers	\$	\$	\$	\$	
	Site Inspections	\$	\$	\$	\$	
	Ground Site Offices	\$	\$	\$	\$	
	<b>TOTAL CONFERENCE GROUND TRANSPORTATION</b>	\$	\$	\$	\$	
<b>CONFERENCE HOTEL (61%)</b>						
DL CODE:						
<b>CONFERENCE HOTEL ROOM CHARGES</b>						
	Room and Tax	\$	\$	\$	\$	
	Facility Fees	\$	\$	\$	\$	
	Behavior & Board Gratuities	\$	\$	\$	\$	
	Hotel Gratuities	\$	\$	\$	\$	
	Room Rental	\$	\$	\$	\$	
	Hotel Miscellaneous	\$	\$	\$	\$	
	<b>TOTAL CONFERENCE HOTEL ROOM CHARGES</b>	\$	\$	\$	\$	
<b>CONFERENCE HOTEL FOOD &amp; BEVERAGE</b>						
	Registrations	\$	\$	\$	\$	

### Key Considerations

1. Fixed Expenses
2. Variable Expenses
3. Hidden Costs




### Program Content = Goals

- Education
- Celebration
- Entertainment
- Retreat
- Planning
- Information Sharing
- Motivational



## Program Elements



- Keynote
- Celebrations
- Trade Show
- Site Tours
- Award Ceremonies
- Facilitators
- Food Booths
- Registration
- Entertainment
- Reception
- Meals
- Breakout Sessions
- Roundtables
- Performers
- Private
- Public
- Info Tables
- Vendor Sales Tables
- VIP
- Workshops

13


## Managing Speakers, Entertainers, Presenters...



14

## Speaker/Presenter Management

- Fee/no fee
- Handouts
- AV/space setup
- Travel & housing
- Misc Expenses
- Contracts
- Cancellations



15

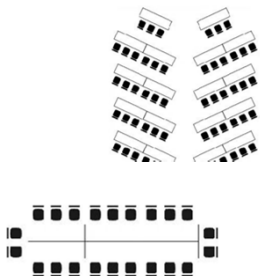
## Set-ups & Logistics - Indoors



16

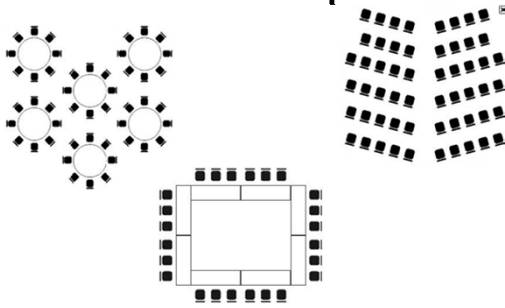
## Room Set-ups

- Conference
- Lecture
- Banquet
- Reception
- Boardroom
- Theater
- Classroom
- Specialty



17

## Room Set-ups



18

## Logistics



A collage of images related to logistics: a horse-drawn carriage, a globe, a person in a wheelchair, a person walking with a cane, and an interior view of a room with chairs.

19


## OUTDOORS



A collage of outdoor event images: hot air balloons, a row of portable toilets, a crowd of people, and several large compost bins labeled 'COMPOST'.

20

## Audiovisual / Production



A collage of audiovisual production images: a large conference room, a stage with a screen, and a large audience at a presentation.

21

## Audiovisual & Production

**PROFESSIONAL GET ONE!**



A collage of audiovisual production images: a stage with a screen, a person speaking at a podium, and a stage with spotlights.

22

## Food & Beverage



A collage of food and beverage images: a globe, a fork and knife, a martini glass, a beer glass, and a hand holding a menu. A sign reads: "Who? What? Where? When? Why?"

23

## Menu Planning



A collage of menu planning images: a catering menu titled "events by the hour" and "2011 Catering Menus", a person at a table, and a globe.

**Special dietary needs**

- vegan
- vegetarian
- religious
- etc.


**Budget**

- service charges
- final counts
- plate service
- buffet

24

### Site Selection

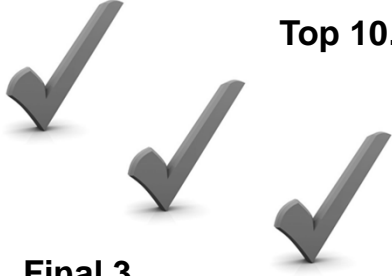
- Size
- Location
- Timeframe
- Cost
- Services
- Negotiables



25

### Site Selection – narrowing




Top 10.....



...Final 3

26

### Site Inspection

**Double-check**

- policies & action
- load in/load out

**Notice**

- staff attitude
- overall location
- competing events

**Look for**

- clean
- room capacity
- lighting/obstructions
- traffic flow
- signage
- access issues

27

### Contracts & Negotiation



28

### The “Negotiables”

- Room Rates, room types
- VIP/Complimentary parking
- % discounts off of food and beverage, and audiovisual
- Reduced (waived) space rental
- Cancellation policies
- Attrition clauses
- Parking
- Hours for fitness center to be open




**ASK FOR IT!**

### Negotiation Tips




- Negotiate top selections ONLY!
- Be upfront
- Leverage short lead times.
- Factor in creative negotiation when there is a stalemate.
- Keep focused on meeting objectives.

## The Legal Terms

- Default & Breach of Contract
- Indemnification
- Contract Termination
- Cancellation/Attrition
- Force Majeure
- Protection Clauses
  - Arbitration, Change of Management, Facility Remodeling, Dispute resolution, Financial issues (bankruptcy, reorganization)
- Insurance Coverage



## Clause Samples

**"Indemnification:** Each party will indemnify, defend and hold the other harmless from any loss, liability, costs or damages arising from actual or threatened claims...."

**"Force Majeure:** Neither party shall be responsible for failure to perform this contract, if circumstances beyond their control, including but not limited to, Acts of God, shortage of commodities...."

**"Cancellation and Performance:** This offer is based in part upon the total revenue anticipated as indicated by the guest room block and planned functions. Group agrees and understands that in the event of a cancellation, or lack of full performance, actual damages the Hotel would incur would be difficult to determined. Cancellation damages will be calculated on a sliding scale...."

**"Right of Termination:** Each party may terminate this Contract for any one or more of such reasons upon written notice to the other party within ten (10) days of such occurrence...."

## Review to Final



- Never sign a contract without express written authority.
- Verbal agreements are included.
- RFP Proposed items are included
- Legal-ease is correct.
- Ensure billing and payment schedules align with company or client processes.
- Include CSR (corporate social responsibility) Items



from  
ATA  
legal / legal,  
law, deriving  
connected  
feeling, 3,  
legal, 4, 5  
legistic

## RFP – Request for Proposal



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## Writing an RFP



General Overview

Detailed information



## What to include:

HISTORY

Activities



Food / beverage



Negotiation

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### 3rd Party Vendors Types



- Production
- Registration
- Transportation
- Lighting
- Catering, Etc.

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### 3rd Party Vendor Specifics

#### DMC vs. CVB's



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### Permits and Approvals

- Research to find out which permits to apply for
- Find out how much time is needed
- Get proof from your vendors
- Labor Union?



### Risk Management



### What is Risk?

#### Financial Risk

- Loss of event profits
- Business failure

#### Legal Risk

- Injury to attendees, employees
- Loss of or damage to property

#### Ethical Risk

- Damage to reputation



### What to do with Risk?

- Avoid
- Accept
- Manage
- Transfer



## How Do We Manage Risk?

Five Step Risk Management Process:

1. Risk Assessment
2. Risk Analysis
3. Risk Planning
4. Risk Control
5. Evaluation and Improvement



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From George Washington University Event Management Certificate Program

## Risk Analysis

		Probability	
Consequences	Low Probability	High Probability	
	Great Consequences	Great Consequences	
	Low Probability	High Probability	
	Minimal Consequences	Minimal Consequences	

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## Evaluation



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## Collect Data

- Paper vs. on-line/digital
- Overall event feedback
- Session feedback
- Presenter feedback
- Evaluate site
- Budget reconciliation



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## USE IT!

- Plan for the next event



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## The Highlights - Remember



- Event Planning Overview
- Budgeting
- Program Development
- On-site Logistics
- Food & Beverage – Menu Planning
- Site Selection
- Contracts & Negotiation...RFP's
- Risk Management
- Evaluation

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THE GEORGE WASHINGTON UNIVERSITY  
WASHINGTON DC  
Event Management Certificate Program

**Earn a Certificate from the Leading  
Institution in Event Planning  
*on-line*  
*customized*  
*face-to-face*  
*week-long***

***come see us in the Exhibitors Area!***

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**Thank you!**



THE GEORGE WASHINGTON UNIVERSITY  
WASHINGTON DC  
Event Management Certificate Program

The Event Management Certificate Program  
George Washington University [http://www.gwu-  
aqe.org/](http://www.gwu-<br/>aqe.org/)

For more information - Check out the booth or  
[Kassia@uoregon.edu](mailto:Kassia@uoregon.edu)

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## Resources

Meeting Professionals International  
(MPI): <http://www.mpiweb.org>

Special Events Society (ISES): <http://www.ises.com>

Professional Convention Management Association  
(PCMA): <http://www.pcma.org>

National Association of Catering Executives (NACE):  
<http://www.nace.net>

The Event Management Certificate Program George  
Washington University: <http://www.gwu-aqe.org/>

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## LIFELONG LEARNING 2012

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### Inbound Marketing

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

## Inbound Marketing

Suzanne Kart, M.A., CeP  
Director of Marketing  
LERN

## Let's start with outbound marketing

- Outbound marketing is where a marketer pushes her message out far and wide hoping that it resonates with someone.



## The main reason outbound marketing doesn't work as well as it used to

The average human today is inundated with more than 2000 outbound marketing interruptions per day and is figuring out creative ways to block them out.

- Caller ID
- Spam filtering
- TiVo
- Satellite radio



## What is Inbound marketing?

- Is a process of using your website in a way that it attracts visitors naturally through search engines, the blogosphere, and social media.



## But why does Inbound work?

- 78% of Internet users do product research online
- 55% more traffic goes to websites with blogs
- 89% of people in the US search the Internet before making a purchase\*

\* Vaynerchuck, 2012

## Think about it

- If nearly 90% of people who are going to purchase a conference/seminar/course are going to search the Internet before they do, don't you want to be at the top of the search ranking?



### And when they do find you...

- Is it enough to just have a course description and price posted?
- Is that enough to convince them to go with you?
- What if your competitor has blog posts by instructors and video testimonials from students? Free samples?



### FREE????

- We can't give away anything for free – then people won't buy what we're selling, right?
- They'll just take the free stuff and run, right?

Wrong

### A marketing lesson from the Grateful Dead



### The Grateful Dead

- Original inbound marketers
- Most successful touring band in history with \$1 billion in revenue from concert tickets.
- They let people record their concerts (free content) and share with anyone.
- This did NOT stop people from paying to see them live – it made MORE people want to see them live.

### So how do we do this Inbound Marketing?



## We start with a plan

- All marketing starts with a plan.
- What are your goals?
- What do you want to achieve?
- Who are you trying to attract?
- Where are they? What are their needs? What can you help them with?



## Next, create a powerful web site

- In Inbound Marketing, your web site serves as the cornerstone for all your efforts.
- You want something that's
  - Intuitive and easy to navigate
  - Looks good
  - Search engine optimized
  - Mobile optimized
  - Easy to update – and updated often.

Searched for  
"Ann Arbor  
art classes"

This ranked first  
in organic search

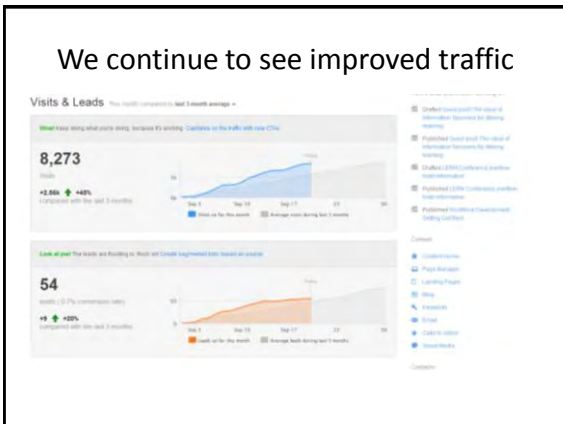
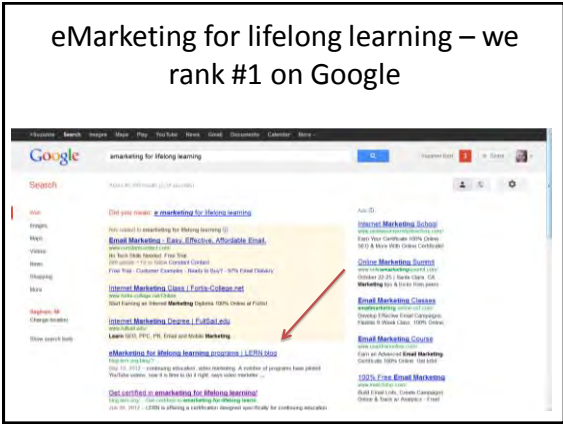
- "Art News" means this page is updated often
- Social media icons mean they have a presence there
- This link to an article written about the Center means that they have inbound links from independent sites
- They use the words "art," "classes," and "Ann Arbor" often.
- Result - #1 search ranking

## Now, it's time to generate traffic!



## Create a blog

- Organizations with blogs get 55% more traffic.
- Blog pages are 400% more indexed



- ### You also need to be active on social media
- Nearly 2/3 of U.S. Internet users regularly use a social network.
  - This helps create inbound links to your site – and your blog – and attracts more prospects.

- ### The goal of social media
- Engage our key constituents in a two-way conversation.
  - Make them feel connected to our organizations so they want to continued the relationship.
- #ern12 @susannekart

- ### What platforms should we focus on?
- Top 3 most used social media sites are Facebook, Twitter, and Pinterest\*
  - The sheer number of people who interact with these sites make them a marketing force that cannot be ignored.
  - Two other networks that are a must are LinkedIn and YouTube.
- \*Direct Marketing News, April 6, 2012
- #ern12 @susannekart



## It also helps with Search Engine Optimization (SEO)

- People online are confused. If they have a question that we have the answer to, we want them to find us.
- All search engines use social media signals (how current your content is, the frequency to which you get linked to) in their ranking processes
- 78% of Internet users do product research online\*
- 89% of Americans search the Internet before making a purchase\*
- When they search for eMarketing for lifelong learning, I want them to find LERN.

#lern12 @suzannekart \* Inbound 2012, Gary Vaynerchuck

## How do we get Search Engine Optimized?

- Identify target keywords
- Routinely create keyword targeted content
- Build quality links to your website
  - Ask others to share your content
- Pay-per-click campaigns do work, but 70% of the links search users click on are organic

## Once you attract visitors to your site, it's time to convert them into leads

– 3-5% of visitors to your site should become leads

## How does someone become a “lead”?

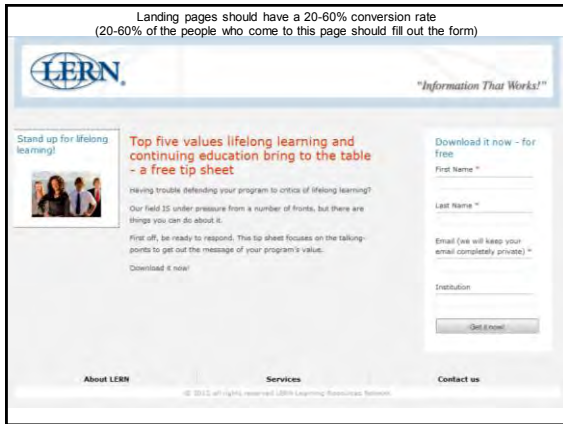
- They fill out a form that allows them to receive a special offer from you such as an eBook, white paper, webinar, or other giveaway.

## How do I get people to convert to leads?

- Build a landing page that describes the offer with a form to collect the lead information.
- When the visitor fills out a form, the user gains access to your offer, receives an automated email, and is entered into your database. (I recommend a third-party vendor service for this)
- Put Calls to Action on your web site and blog.

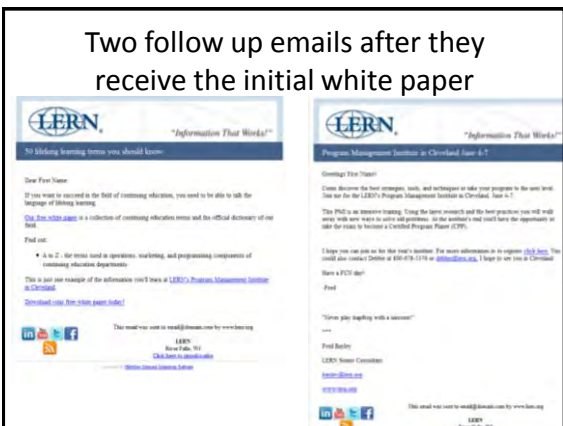


The image shows a screenshot of a blog post from LERN. The page has a header with the LERN logo and the title "Optimism For Wins?". Below the header is a navigation bar with "LERN blog" and "Subscribe" buttons. The main content area features a large image of a group of people in a meeting. To the right of the image, there is a red arrow pointing to a blue button that says "Download FREE, no cost". This button is labeled "Call to Action".



Once they're leads, how do we turn the leads into sales?

- Segment your leads based on what forms they converted on.
- Use lead nurturing to send them additional offers via email.
- Then ask for their business.



Total for all Institutes participants who converted on a landing page

- 18 participants converted
- Approximately \$18K in income as a result

Thank you!

- Suzanne Kart
- [kart@lern.org](mailto:kart@lern.org)
- Connect with me via social media at [suzannekart.com](http://suzannekart.com)



## LIFELONG LEARNING 2012

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### New Growth Markets

Heather Dimitt	Wendy Evers	Djuna Forrester	Michael Seppi	Chuck Ramm
LERN	SDSU	North Central TX College	Rockwood School District	City of Temple
Columbia, MO	San Diego, CA	Gainesville, TX	Eureka, MO	Temple, TX

## New Growth Markets




Heather Dimitt  
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[www.twitter.com/msheatherd](http://www.twitter.com/msheatherd)  
[www.lern.org/conference/heather](http://www.lern.org/conference/heather)

## New Growth Markets Are Critical

- You only make money from **repeat customers**, not new customers. So you need new courses to retain your past participants.
- Trends change.
  - Many courses have a life span and then go into decline.
  - In order to tap into the new trends, you have to keep offering **new courses**.

## What Is a “New Growth Market”?

- An emerging area of programming with the potential to generate \$100,000 or 5-20% of your budget **by Year 3 (that’s ~\$33K/year)**.
- A new growth market is usually not a popular individual course (Might be if the income potential is big.)
- More than likely it’s a program or a division
  - Summer camps
  - Certificate or certification prep program
  - Cooking series

## Ideal Programming Percentages

50% Repeat/Signature
30% Seasonal
20% New

## Development Time Line

Months before new program is offered					
36	30	24	18	12	Event -----
Brainstorming					
Researching Data	Researching Data	Selecting Options	Modelling	Quantitative Research	
				Testing	
				Making Decisions	Evaluation & On-going Research

## Where to Look for New Growth

### 1) New subjects

Traditional, but not only way

### 2) New audiences

### 3) New formats

Used to have 1-3, now many options

## Where to Expand

	<b>Current Clients</b>	<b>New Clients</b>
<b>Existing Products</b>	This is what you have now. You have existing products for existing clients.	Here's a good way to expand. Take an existing product to a new audience.
<b>New Products</b>	Here's a good way to expand. Create a new product for your existing clients.	Here's a poor and risky choice. It is extremely difficult to succeed by creating a new product for a new audience. Stay away from this option.

## Strategy 1: Focus on the Winners

- 1-2 SuperStars
- 1-2 Above Average
- 3-4 Average
- 1-2 Below Average
- 1-2 Losers



10 Classes/Events/Offerings

## Examples

- Moving 'below average' course to average

<b>Income</b>	\$1,000	100%	\$2,000	100%
<b>Promotion</b>	300	30%	500	25%
<b>Production</b>	400	40%	700	35%
<b>Total Costs</b>	700	70%	1,200	60%
<b>Operating Margin</b>	\$300	30%	\$ 800	40%

## Examples

- Focus on a winner.

<b>Income</b>	\$2,000	100%	\$4,000	100%
<b>Promotion</b>	400	20%	800	20%
<b>Production</b>	600	30%	1,200	30%
<b>Total Costs</b>	1,000	50%	2,000	50%
<b>Operating Margin</b>	\$1,000	50%	\$ 2,000	50%

## Strategy 2: Know Your Diversity

- Identify your top 7 audience segments
- Identify your top 7 divisions.
- Then ask:
  - Where can you offer more of your top subjects to your top audiences?
  - What divisions should you grow?

## 7 Audiences to 7 Divisions

	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5	Segment 6	Segment 7
Division D							
Division B							
Division F							
Division A							
Division C							
Division G							
Division E							

## Techniques to Focus on the Winners

- Offer more courses or develop new courses in divisions with high operating margins and low cancellation rates.
- Offer few or no new courses in divisions with low operating margins and high cancellation rates.
- Cut the dogs.
  - Drop courses and divisions that lose money for you.

## Program Planner Tool in LERN Club

Profitability Report by Term and Category

Term	Income	Promotion Cost	Production Cost	Direct Cost	Operating Margin
Total for Category Arts	\$3,085.00	\$300.00 (9.72%)	\$1,550.00 (50.24%)	\$1,850.00 (59.97%)	\$1,215.00 (40.03%)
Total for Category Play	\$5,400.00	\$300.00 (5.56%)	\$2,250.00 (41.67%)	\$2,550.00 (47.22%)	\$2,850.00 (52.78%)
Total for Category Profit	\$3,850.00	\$300.00 (7.79%)	\$1,350.00 (35.06%)	\$1,650.00 (42.86%)	\$2,200.00 (57.14%)
Total for Term Summer 2012	\$12,335.00	\$650.00 (5.27%)	\$5,150.00 (41.75%)	\$5,800.00 (47.02%)	\$6,535.00 (52.98%)
Total for Report	\$12,335.00	\$650.00 (5.27%)	\$5,150.00 (41.75%)	\$5,800.00 (47.02%)	\$6,535.00 (52.98%)

LERN Key Formula Report by Session and Category

Total	Cancel	Run	Cancel %	Avg. Fee	Registrations	Avg. Reg.	New	New %
Term: Summer 2012								
Totals for Category Arts	2	4	33.33%	\$68.56	45	11.25	2	33.33%
Totals for Category Play	1	5	16.67%	\$75.00	72	14.40	2	33.33%
Totals for Category Profit	2	4	33.33%	\$74.04	52	13.00	2	33.33%
Term Totals for Summer 2012:	5	13	27.78%	\$72.99	169	13.00	6	33.33%
Report Totals:	5	13	27.78%	\$72.99	169	13.00	6	33.33%

2000 brochures were distributed. Promotion:Registration Ratio is 12:1.

2000 brochures were distributed. Promotion:Registration Ratio is 12:1.

Printed on October 19, 2012

## Strategy 3: New Formats

### Community Programs

- One night
- Friday night or Saturday
- Camps
- Gentle Saturday: morning workshops, music and lunch, afternoon workshops
- One-day trips

### Business Programs

- Four-day institutes
- Immersion: 14 -hour weekends
- Webinars & WebCasts
- Online courses
- Certificates
- On-site, customized

## Format Strategies

- Length of course or event
- Package two or more topics
- Split up two or more topics
- Name of format (symposium, fest, etc.)
- Activities: hands-on, discussion, lecture, tours, debates, collaboration, teams
- Face-to-face and online, hybrid (both)

## Recreation - Chuck Ramm



- Home School Classes
- Outdoor Survival
- Pre-School Sports
- Indoor Soccer
- Running Events



## Public Schools– Michael Seppi



- Home Alone/Babysitting Basics
- Science Adventure Travel Trips
- Intro to Scuba
- Youth Show Choir
- Youth Orchestra
- Adult Community Choir
- Summer Expo
- Community Shows - Holiday and Summer



## University– Wendy Evers



- Grant Writing Online Cert.
- Web and Mobile Apps Cert.
- Energy Management
- Water Management & Landscape Sustainability
- Video Gamers Cert.
- Social Media & Marketing
- TV and Film Cert.
- Mid Level Healthcare Cert.
  - Electronic Healthcare Management
  - Dialysis Certification
  - Ultra Sound Tech
  - ECG/EKG for Nurses
- Healthcare Cont.
  - Outpatient
  - Primary care offices
- Int'l Gaming Online Cert.
- "Train the Trainer" Online Cert. for Faculty
- Emerging Markets Partnerships
  - India, Philippines, Mexico & Brazil
- Professionals' Career Transition
- Customer Service Cert.
- Energy Auditing - BPI Cert.
- Veteran Outreach Programs
  - Transfer & enrich skills for civilian jobs
  - Entrepreneurial Boot Camp

## College-Djuna Forrester



- Community Education:
  - Making Sushi
  - Cake Decorating
  - Dream Interpretation
  - Comparative Religion
  - Crafts of Yesteryear
  - Elder Law Bootcamp
  - Aquaponics
  - Lecture Series: Just Ghostin Around; Evening with the Presidents; Battles of Civil War
  - Intro to Blacksmith
  - Welding for Women
- Workforce Development/CPE
  - Drop Out Recovery
  - ESL – all levels
  - College Skills Gap
  - Dental Assisting
  - EKG/Telemetry Tech
  - Sterile Instrument Tech
  - Welding
  - Accounting/Bookkeeping
  - Spreadsheets
  - CISCO

## Hot Topics: Recreation/Enrichment

- Martial Arts
  - Capoeira
  - Aikido
  - Tae Kwon Do
- Adult Sport Leagues
  - Basketball
  - Volleyball
  - Softball
  - Hockey
  - Soccer
  - Bowling
- Jin Shin Jyutsu
- Pilates
- Yoga
- Core/Balance Training
- Circuit Based Weight Training
- Tennis
- Archery
- Dance
  - Zumba/Aqua Zumba/Zumba Gold
  - Bhangra
  - Chinese Folk
  - Hoop
  - Ballroom Dance
  - Ballet
  - Hip-Hop
  - Salsa
  - Western

## Hot Topics: Recreation/Enrichment

- Kickboxing
- Cardio Bootcamp
- Aquatics
  - Swimming
  - Diving
  - Aerobics
- Bicycling
  - Bike Rodeos
  - Bike Swaps
- Coaching Certification
- Music
  - Parent/Child
  - Guitar
- Motorcycle Education
- Defensive Driving
- Digital Photography
- Internet Privacy
- Social Media
- Ebay
- Video Game Design
- Using the iPad
- Excursions/Tours
  - Backpacking
  - Campouts
  - Historic
  - Other States/Provinces
- Current Events/Issues
- History

### Hot Topics: Recreation/Enrichment

- Foreign Language
- Genealogy
- Estate Planning
- Medicaid Basics
- Home Improvement/Better Living
  - Dare to Repair for Women
  - Designing a Garden
  - Community Garden
  - Organic Living
- Sewing
- Crochet
- Knitting
- Floral Design/Wreath Making
- Upholstery
- Woodworking
- Antiques
- Small Engine Repair
- Extreme Couponing
- Painting
  - Oil
  - Water
  - Acrylics
- Ceramics/Pottery
- Sculpture
- Drama
  - Film
  - Theatre
  - Television

### Hot Topics: Recreation/Enrichment

- Drawing
  - Jewelry Making
  - Origami
  - High End Cooking
    - Chef Lead Classes
    - Italian Cuisine
    - Wine Tasting
    - Sushi
    - Cake Decorating
    - Tea Sommelier
  - Microbrewery
  - Hand Gun Safety
  - Kids/Youth\*
    - Culinary
    - Robotics
    - STEM
    - Forensics
    - Art
    - Theatre
    - Video Game Design
    - Digital Photography
- \* Bridge customers in youth programs to your adult offerings*

### Hot Topics: CPE & Workforce Training

- Nursing/Nurse Refresher
- Ambulatory Care Nurse
- Surgical Nurse/Technologist
- Geriatric/Dementia Care
- Mental Health Nurse
- Radiology Technician
- Cardiovascular Technician
- Clinical Medical Assistant
- CNA/Home Health Aide
- Phlebotomy
- CPR/First Aid
- Pre-Med Post-Bacc Cert.
- Pharmacy Technician
- Medical Coding & Billing
- Health Information Technology
- EMT/Paramedic
- Firefighting
- Police Academy
  - Revolver/Semiautomatic Requalification
- Unarmed Security Officer
- Personal Trainer
- Massage Therapy
- Physical Therapy Aide
- Nail Technician
- Serve Safe

### Hot Topics: CPE & Workforce Training

- Responsible Beverage Service
- Veterinary Assistant
- Water & Waste Water Technology
- Telecommunications
- Green Industries Certificate
- LEED
- Construction Management
- BPI Training
- Residential Energy Auditor Training & Exam Prep
- HVAC
- Pesticide Application
- Viticulture & Enology
- Solar Panel Installation
- Solar Thermal Water Heater Installation
- Welding
- Forklift Operator
- Mobile Crane Certification
- CDL
- Truck Driving
- Electrical Safety
- Electrical Apprenticeships
- Industrial Maintenance
- Mining Certification

### Hot Topics: CPE & Workforce Training

- HazMat and Safety
- Auto Emissions
- Aerospace
- Supply Chain Mgmt
- Quality Control
- Six Sigma
- Lean Mastery
- Engineering
- Mechatronics
- Computer Numerical Control
- CompTIA
- CISCO
- VMware
- Network Security
- BICSI
- MS Office
- Social Media Strategist
- Quickbooks
- Adobe Creative Suite
- Web Analytics
- Human Resources (SHRM, PHR, SPHR)
- Workplace Spanish
- Community Interpreter
- Call Center Agent
- Leadership Development

### Hot Topics: CPE & Workforce Training

- Executive Coaching
- Project Management
- Paralegal
- Notary Public
- Funeral Director
- Film Institute
- Interior Design
- Fashion Design
- Substitute Teaching
- EDGE Professional Dev. For Visual Artists
- Entrepreneurship
- Small Business Management
- Non-profit Management
- Grant Writing
- Regulatory Affairs
- Real Estate
- Tour Guide
- Child Development
- Business/Personal Writing
- Administrative Assistant Cert
- Soft Skills
  - Time Management
  - Dealing with Difficult People
  - Conflict Resolution
  - Customer Service
  - Ethics
- GRE/SAT/PRAxis, etc. Prep





## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

---

### Why Winners Win

Greg Marsello  
Vice President  
LERN  
Tiverton, MI

# Why Winners Win

Washington, D.C. Conference 2012  
Greg Marsello



## Projections

25% of the programs LERN works with are winners, while LERN predicts 25-50% of existing programs will probably be shut down over the next five to ten years!

## Winners



Kim Johnson  
Kirkwood Community College

Doug Soo  
Langara College

Jan Wahl  
San Diego State University

Pete Hangen  
City of Virginia Beach

Rita Martinez-Purson  
University of New Mexico

## Challenges

- Economy
- Central administration
- Staff skills & productivity
- Initiatives
- Competition
- Knowledge
- Vision



## #1. Financially Self-Sufficient

Income	\$ _____	100%
Promotion	\$ _____	10-15%
Production	\$ _____	45-50%
Direct Costs	\$ _____	60%
Operating Margin	\$ _____	40%
Administration	\$ _____	35%
Net	\$ _____	5%

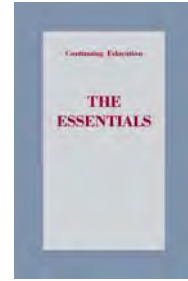
## #2. Right Structure



### #3. Data-Driven



### #4. Best Practices



### #5. Planning



### #6. Right Software



### #7. Leader's Role





## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

---

### Building the Right Product Mix

Greg Marsello  
Vice President  
LERN  
Tiverton, RI



## Building the Right Product Mix

Washington, DC  
Conference 2012  
Greg Marsello

## Key Guidelines

- Role of product development staff
- Products, audiences, delivery methods
- 7 primary market segments
- 20% new
- 30% Rule
- What is a new initiative?

## 4 Steps for Building a Profitable Product Line

1. Create a profile describing your typical customer.
2. What are their wants and desires?
3. What are their problems?
4. Continually learn about new products available in your niche.

## The Cost of Product Development

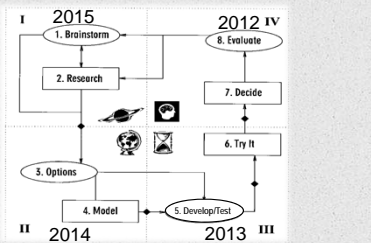
- Budgeting product development
- Pricing product development
- Product development ROI



## Depth of Selection

- New product innovations
- Up-and-coming brands
- Multiple styles of hot products
- Accessory products
- Seasonal products
- Levels of products
- Up-sell products
- Cross-sell products
- Cross category products

## LERN's 8-Step Needs Assessment Model



## Prototyping & Testing



## So ... What Exactly is the Right Product Mix?

INNOVATION  
SUCCESS  
EVALUATION  
DEVELOPMENT  
GROWTH  
SOLUTION  
PROGRESS  
MARKETING



THANK YOU!



Greg Marsello

[www.lern.org](http://www.lern.org)



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

---

### Living in a Cloud

Dan Belhassen  
Modern Earth  
Winnipeg, MB

## Living in a Cloud

Dan Belhassen  
greatBIGnews.com  
Modern Earth Inc.

## About your presenter

- Dan Belhassen
  - Founder & President Modern Earth Inc., an Internet technology company
  - Website creators, online software developers, search engine consultants, elearning specialists, mobile app developers, new media marketing specialists
  - Find me in my booth if you want to follow up
  - Presentation at Modernearth.net/lern2012



### The Evolution of the Cloud

Web Application  
Software as a Service (SAAS)  
Cloud Computing

Cloud Application



### Pros

- Access from anywhere
- Browser Based
- Reduced IT need
- Lower cost (generally)
- Backup management
- Customer service
- Hacking prevention



### Cons

- Internet dependant
- Browser compatibility
- Browser version updating
- Higher cost (generally)
- Trust in backups
- Completely dependant
- Hacking potential



### Where to find Cloud Apps

- Capterra.com
- Google.com/apps
- AppSumo.com



### Google Analytics

- Know your visitors
- Research website usage
- Cost: FREE
- Google.com/analytics





### Lucky Orange

- Watch your visitors
- Recover from lost buyers
- Real time insights
- Cost: \$10/month
- LuckyOrange.com



### SEO Moz

- Simplify your SEO
- Check website links
- Improve your ranking
- Cost: \$99/month
- Seomoz.org



### Bold Chat

- Engage your visitors
- Prevent frustration
- Visitors Buy sooner
- Cost: \$49/month
- Boldchat.com



### Optimizely

- Simply A/B testing
- Evolve to thrive
- Cost: \$17/month
- Optimizely.com



### BinaryCanary

- Get alerted to downtime
- SMS, email & phone
- Reduce downtime
- Cost: FREE
- BinaryCanary.com

Thank you!  
greatBIGnews.com  
modernearth.net



Presentation available at <http://modernearth.net/lern2012>



## LIFELONG LEARNING 2012

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### New Twitter Ideas

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

## TWITTER

Suzanne Kart, M.A. CeP  
Director of Marketing, LERN

@suzannekart #lern12

## Need to take a minute ...

- I'm going to do a brief overview of exactly what Twitter is first and then we'll be covering:
  - Creating interesting messages
  - Doing research on Twitter
  - Integrating Twitter with publicity
  - Tagging
  - Developing relationships in the Twittersverse
  - Getting retweeted
  - Creating and editing lists
  - Getting others to share your lists
  - Getting listed yourself.

@suzannekart #lern12

## Twitter

- Twitter is a micro-blogging social networking tool where you can post short messages (no more than 140 characters).
- A lot of prominent people are using Twitter, from Karl Rove to the CEO of Zappos, and they offer quick, punchy updates about anything they happen to be doing or thinking about – from politics to their daily trips to Starbucks.

@suzannekart #lern12

The key is not to push content, but to engage people

@suzannekart #lern12

## How do we use it?

- People have to be a “follower” to receive your tweets.
- You also need to start following others to receive their tweets.

@suzannekart #lern12

Twitter is a broadcast medium with a reply function

- We don't use it like Facebook

@suzannekart #lern12

## Twitter is a pull communication

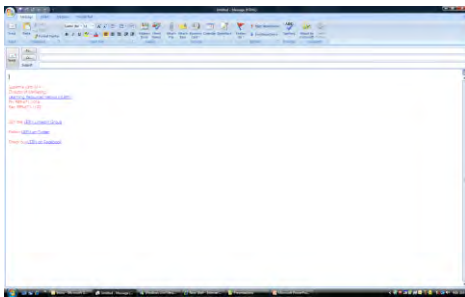
- Good way to give people a heads up on something new
- Make it worth someone's time to "follow" you, don't oversell, update.

@suzannekart #lem12

## How do I get people to follow me?

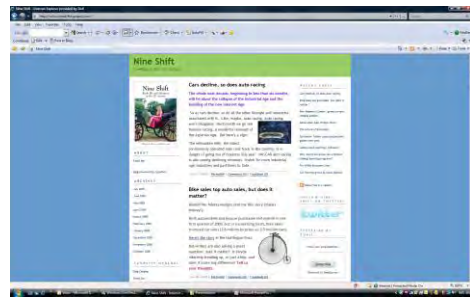
@suzannekart #lem12

Add a link to your Twitter page on your email signature (i.e. Follow me on Twitter!)



@suzannekart #lem12

Add a link to your web page

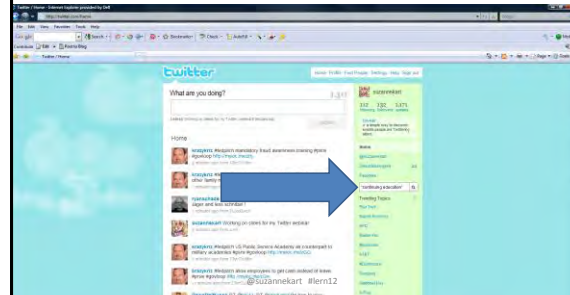


@suzannekart #lem12

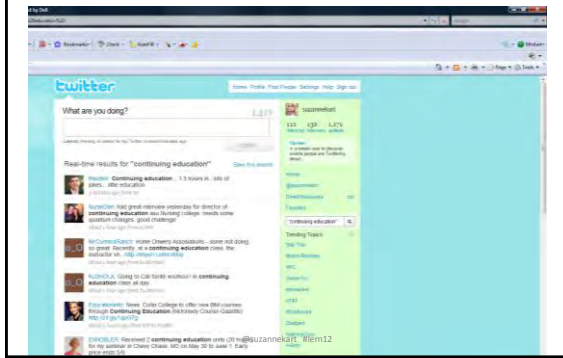
Start following other people

@suzannekart #lem12

Search for people within your target group



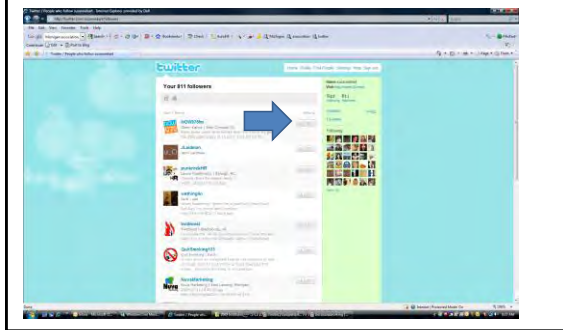
About half of those you follow will start to follow you



Follow someone else's followers



Click here to follow this person



One more way

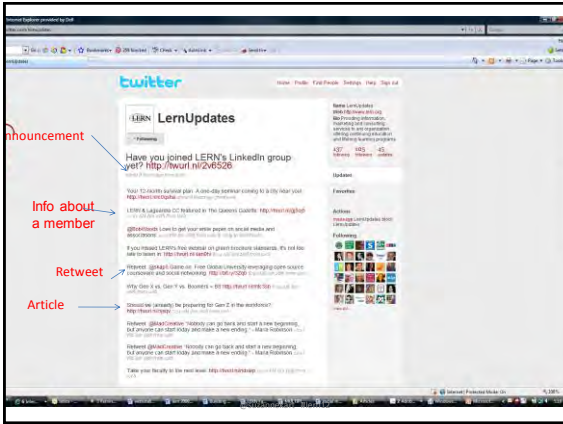
- Write interesting tweets that others will "retweet"
- Example:
  - Original Tweet:
    - LernUpdates: Join us for a Twitter webinar. Info at [www.lern.org](http://www.lern.org)
  - Retweet:
    - SuzanneKart: RT @LernUpdates Join us for a Twitter webinar. Info at [www.lern.org](http://www.lern.org)
- By putting @LernUpdates in the retweet, all SuzanneKart followers know where to find the LernUpdates feed.

The science of retweeting

- Highly followed accounts that tweet a lot of links (1K+ followers) are most effective at getting retweeted.
- If 60-80% of your tweets include links, you will get more followers and retweets.
- The more you reply to tweets, the less you get retweeted.
- Including "Please Retweet" in your tweet results in 4X more retweets.
- Retweets spike between 4 and 5 p.m. ET
- Saturday and Sunday are the days that get the most retweets.

What should I be tweeting about?

- You can't just push your sales message, because your followers will stop following you.
- You can tweet sales messages, as long as you tweet other information, too – information that's of interest to your followers:
  - Articles
    - Do not need to worry about legal issues
  - Retweets
  - Announcements
  - Information about people involved in your program
  - Tweets about new blog posts



Can I get my Twitter updates to automatically show up on other social networks like Facebook & LinkedIn?

- Hootsuite.com
- Applications within the other social networks

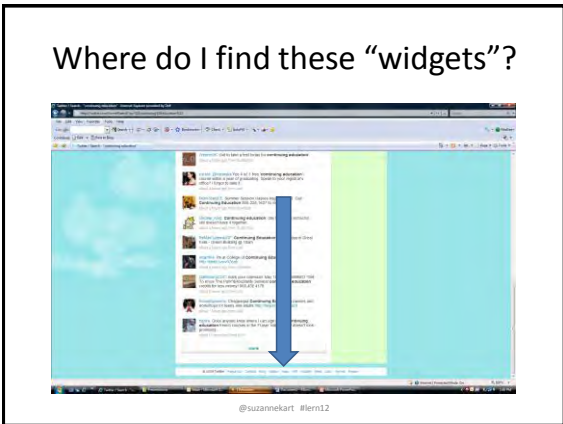
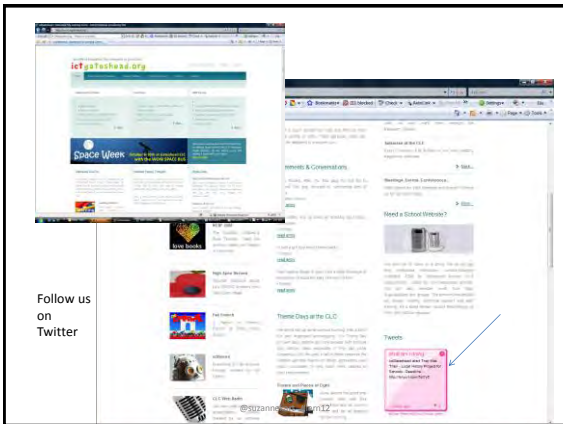
@suzannekart #lern12



How do I let my current visitors know we're on Twitter?

- Put a widget on your website

@suzannekart #lern12



## Widgets link gives you choices and easy directions



## Who should tweet for your organization?

- It's fine if everyone in your organization tweets, but there should be only one tweeter that handles your organizational feed.

## How often do you need to tweet?

- An organizational Twitter feed doesn't need to be updated as often as an individual.
- For individuals – aim for daily (3-5 times)
- For organizational feed – aim for 3-5 times a week.

## TAGGING AND HASH TAGS

## What's the difference?

## Tagging

- Refers to using the @ symbol to reference people in our tweets.
- You get a notice from Twitter when someone tags you.
- "You should have attended the Twitter session presented by @suzannekart"
- When you click on @suzannekart, it takes you to Suzanne Kart's Twitter feed.

## Hashtags

- Similar to tags, but you use the # to aggregate/group tweets together.
- Great for conferences and events.
- “You should have attended the #lern2011 conference. It was fun.”
- When you click on #lern2011, you see what everyone who tweeted about the conference with that hashtag has said.

@suzannekart #lern12

## What not to do

- To connect unrelated topics – the result could mean loss of followers and hate mail.
- For instance: “If you think #911 was big, you should check out the #LERN2011 conference”

@suzannekart #lern12

## Why even bother with tags and hashtags?

- Tagging people & sharing content keeps you relevant.

@suzannekart #lern12

It establishes you as a messenger of information

@suzannekart #lern12

It establishes you as an expert on a particular subject

@suzannekart #lern12

It establishes you as someone who influences others

- Websites like Klout.com gauge the influence you have by monitoring things like how active you are and how much you’ve been tagged on Twitter

@suzannekart #lern12



## What exactly is Klout?

- The Klout Score measures influence based on your ability to drive action.
- Every time you create content or engage you influence others.
- The Klout Score uses data from social networks in order to measure:
  - How many people you influence (True Reach)
  - How much you influence them (Amplification)
  - How influential they are (Network Score)



@suzannekart #lem12

## What's better – tagging or direct messaging?

- Definitely tagging
- DM is now often seen as spam

@suzannekart #lem12

## Tagging versus DM

- Tagging someone show the Twitter ID to more people
- DMing someone just puts spam in their inbox
- Unless you ACTUALLY know someone and/or have talked prior, don't bother with DM – especially with things like “Thanks for following @SuzanneKart. You should check out my Facebook fan page, too.”
- The result is often that the person will “un” follow you.

@suzannekart #lem12

## A few more tips to remember

- If you want to develop relationships on Twitter, read other tweets, retweet good content, tweet good content, and stay on top of keywords and interests you follow.
- If you want to get retweeted, you do the same

@suzannekart #lem12

## Using lists in Twitter

@suzannekart #lem12

## What are Twitter lists

- Twitter lists are a way to organize others into groups.
- When you click to view a list, you'll see a stream of tweets from all the users included in that group.

@suzannekart #lem12

## What can lists do for you?

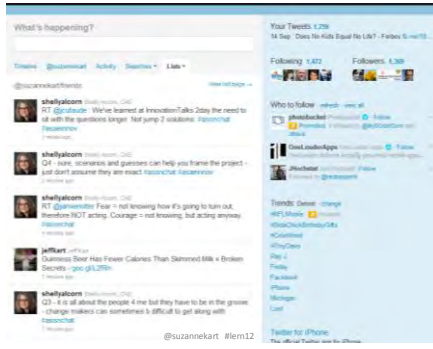
- Boost your online presence among the most engaged users.
- Brand you as an expert.
- Associate your Twitter feed with other experts.
- Get you more followers

@suzannekart #lern12

## Example



## A list I created



@suzannekart #lern12

## List for THIS conference

@LERNUpdates/lernconference2012



## See what lists people are on



@suzannekart #lern12

## Want someone to put you on their list?

- Just ask! Most people are happy to accommodate.

@suzannekart #lern12

## Using Twitter as a networking tool

@suzannekart #lem12

## How do you use it to network?

- To connect with people with similar interests
- To find other professionals
- To connect without being “friends.”

@suzannekart #lem12

## Twitter versus Facebook

- Facebook is a more personal place.
- Facebook is a neighborhood, while Twitter is “downtown.”

@suzannekart #lem12

## Personal branding

- Share interesting information
- Respond to questions
- Retweeting

@suzannekart #lem12

## Always include a link!

BAD:

“Check out our conference brochure” (How?)

GOOD:

“Check out the latest on the California wildfires  
<http://bit.ly/cali234>”

@suzannekart #lem12

## Creating a quality list

- Quality is better than quantity when you are trying to brand yourself
- Block spammers
- If someone RTs your content, consider following them.

@suzannekart #lem12



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# Programming for Twenty Somethings

Heather Dimitt  
LERN  
Columbia, MO

  
 1982-1992

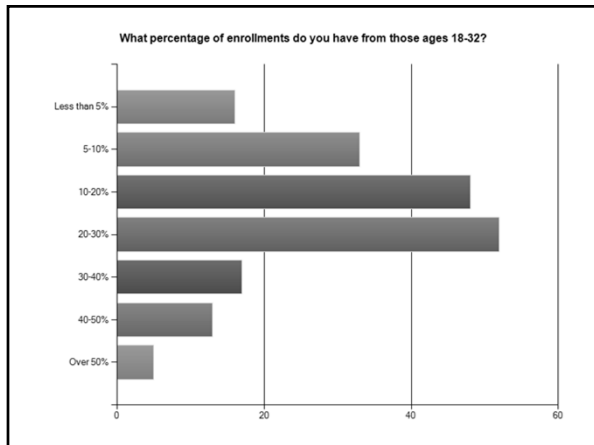
## Programming for Twentysomethings





Heather Dimitt  
[heather@lern.org](mailto:heather@lern.org)  
[www.linkedin.com/in/heatherdimitt](http://www.linkedin.com/in/heatherdimitt)  
[www.facebook.com/heatheratlern](http://www.facebook.com/heatheratlern)  
[www.twitter.com/msheatherd](http://www.twitter.com/msheatherd)






### Needs Assessment Timeline

Months before new program is offered					
36	30	24	18	12	Event -----
Brainstorming		Selecting Options		Quantitative Research	
Researching Data		Modelling		Testing	
		Making Decisions		Evaluation & On-going Research	

## Economics

In 2009, it was reported that "by the age of 20, one in two young people will have lived in a household receiving food stamps."

-Archives of Pediatrics & Adolescent Medicine, Vol. 163 (No.11). 11/2009



## Family Matters



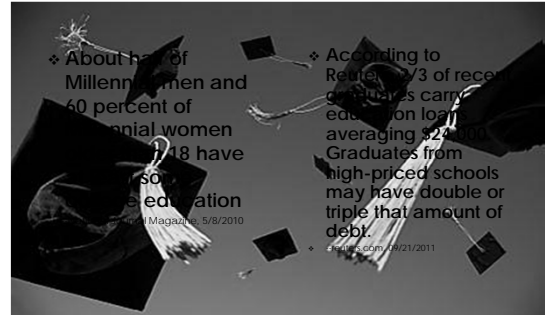
Forty percent of twentysomethings move back home with their parents . --The New York Times Magazine, 8/18/2010



The 2010 census shows the median age at first marriage is now 26.7 for women and 28.7 for men

--USA Today, 9/22/2011

## Education



## Employment

❖ The unemployment rate for 18-29 year olds was 12.7 percent in August 2012.

--virginiabusiness.com, 9/12/2012

❖ The number of unemployed youth (16-24) in July 2012 was 4 million, 17.1%.

--U.S. Bureau of Labor Statistics, 8/21/2012

❖ "This week, the U.S. Census Bureau reported that one in three people, ages 20-29, can't find work."

--examiner.com, 9/21/2010

## A Quick Look

**Millennials' priorities**  
Percentage who say the following is one of the most important things in their lives:

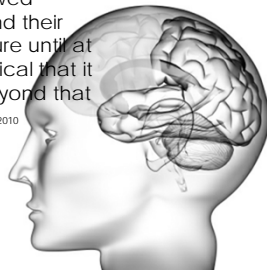


Note: Based on adults ages 18-29

--USA Today, 2/2011

## A Primed Market?

A National Institute of Mental Health study, which followed nearly 5,000 children found their brains were not fully mature until at least 25 (and it seems logical that it continues developing beyond that age). --The New York Times Magazine, 8/18/2010



## Hot Topics


### Recreation/Enrichment

- Painting
- Digital Photography
  - Smartphone Photography
- Piano
- Guitar
- Motorcycle Education
- Gardening
- Sewing
- Ceramics
- Excursions
- Couponing
- High End Cooking
  - Chef lead classes
  - Wine tasting
  - Sushi
  - Cake Decorating
- Microbrewery
- Video Game Design
- Paranormal\*
- History of Region type

**Hot Topics** 

### Recreation/Enrichment

- Wreath Making
- Adult Sport Leagues
  - Basketball
  - Sand Volleyball
  - Softball
  - Hockey
  - Soccer
- Pilates
- Yoga
- PiYo
- Dance
  - Exotic
  - Hoop
  - Ballroom Dance
  - Tap
  - Hip-Hop
  - Salsa
- Zumba
- Martial Arts
  - Capoeira
  - Aikido
  - Tae Kwon Do
- Kickboxing
- Cardio Boot Camp
- Circuit Weight Training
- Archery
- Gymnastics
- Water Fitness
  - Swimming
  - Aqua Zumba
  - Aqua Aerobics
- Small Engine Repair

**Hot Topics** 

### CPE & Workforce Training

- Nursing/Nurse Refresher
- Ambulatory Care Nurse
- Surgical Nurse/Technologist
- Geriatric Nurse
- Mental Health Nurse
- Sterile Processing/Medical Device Reprocessing
- EKG Technician
- Clinical Medical Assistant
- CAN/Home Health Aide
- Phlebotomy
- Pre-Med Post-Bacc Cert.
- Pharmacy Technician
- Medical Coding & Billing
- Health Information Technology
- EMT/Paramedic
- Firefighting
- Police Academy
  - Revolver/Semiautomatic Qualification
- Personal Trainer
- Physical Therapy Aide
- Serve Safe
- Responsible Beverage Service

**Hot Topics** 


### CPE & Workforce Training

- Water & Waste Water Technology
- Green Industries Certificate
- LEED
- Construction Management
- HVAC
- Solar Panel Installation
- Solar Thermal Water Heater Installation
- Residential Energy Auditor Training & Exam Prep
- Aerospace
- Welding
- Forklift Operator
- CDL
- Electrical Safety
- Electrical Apprenticeships
- Industrial Maintenance
- Supply Chain Mgmt
- Quality Control
- Six Sigma
- Lean Mastery
- Mining Certification
- HazMat and Safety
- Computer Numerical Control


**Hot Topics** 

### CPE & Workforce Training

- Leadership Development
- Project Management
- HR/HR Management (SHRM, PHR, SPHR)
- Administrative Assistant Cert
- Soft Skills
  - Time Management
  - Dealing with Difficult People
  - Conflict Resolution
  - Customer Service
  - Ethics
- Real Estate
- Interior Design
- Substitute Teaching
- Entrepreneurship
- Tour Guide
- Child Development
- Business Writing
- Regulatory Affairs
- Workplace Spanish
- MS Office Updates
- Quickbooks
- Adobe Creative Suite
- CompTIA
- CISCO
- VMware
- Network Security
- BICSI

**Hot Topics** 

### What Else is Working?



- ❖ ACT Prep
- ❖ LSAT Prep
- ❖ ESL
- ❖ Career Readiness Certificate

### Where to Expand

	Current Clients	New Clients
Existing Products	This is what you have now. You have existing products for existing clients.	Here's a good way to expand. Take an existing product to a new audience.
New Products	Here's a good way to expand. Create a new product for your existing clients.	Here's a poor and risky choice. It is extremely difficult to succeed by creating a new product for a new audience. Stay away from this option.

## 10 College Courses That Didn't Exist 20 Years Ago---Thanks Mashable!

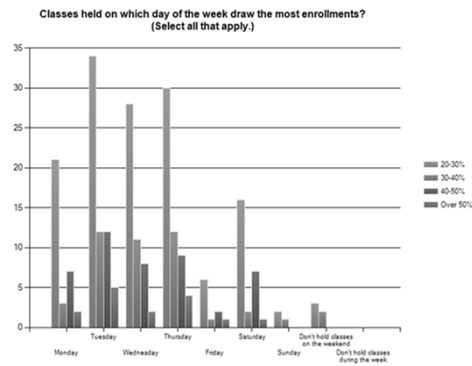
- Design & Development for Video Games  
-University of Southern California
- The Beauty and Joy of Computing  
-University of California, Berkeley
- Science Facts & Science Fictions  
-Harvard University
- Making Digital Holograms  
-University of New South Wales
- Technology Entrepreneurship  
-Carnegie Mellon University
- Technology and Imagination  
-Massachusetts Institute of Technology
- Data Journalism and Investigative Reporting  
-New York University
- Social Media & Virtual Communities  
-Emory University
- Media & Social Psychology  
-Fielding Graduate University
- Audio for the Web  
-New York University

## Growing Trends: Food Festivals

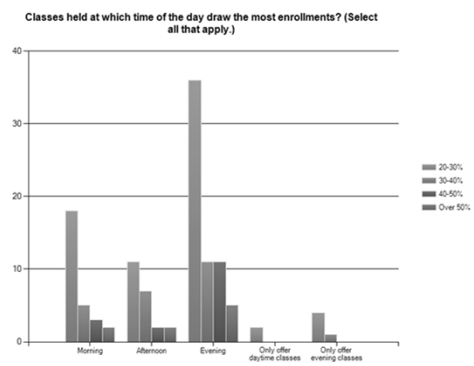


- ❖ 21% of Millennials have eaten at a food festival
- ❖ Social
- ❖ SM Shareable
- ❖ Experiential
- ❖ Multicultural
- ❖ Localvore movement

## Which Day Has The Best Enrollment?



## Which Time Has The Best Enrollment?



## As Learners

- Expect brief, concise and instant information
- Low threshold for boredom
- Parallel processing
- Visual, nonlinear and virtual

## Instructional Techniques

### Doing Is More Important Than Knowing





**Classes That "Do"**

Remember their characteristics and interests:



- ❖ Colorado State University's Native Plant Identification field trip-based workshops
- ❖ Olds' College's Fibre Week
- ❖ St. Louis Community College's Wine Trails & Tiger Tails-a visit to a tiger sanctuary with lunch and tour at a winery

**Classes That "Do"**




- Global grassroots movement of entrepreneurs learning the basics of founding startups and launching successful ventures.
- Anyone is welcome to pitch their startup idea and receive feedback from their peers.
- Teams organically form around the top ideas and then it's a frenzy of business model creation, coding, designing, and market validation.

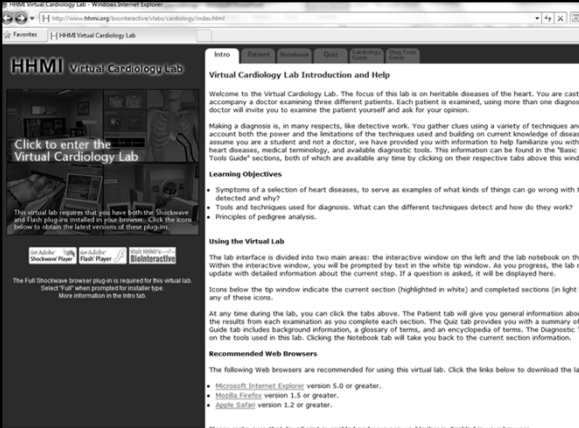
**What Else Should You Try?**

- ❖ Diversification in delivery
- ❖ "Module" curriculum
- ❖ Develop "testing out"
- ❖ Develop virtual labs and simulations
- ❖ Create standard operating procedure materials: job aids, check lists, cheat sheets, etc.
- ❖ Develop smartphone applications


**Professional Development Program Delivery Diversity**



- Seminars 10% - 30%
- Contract Training 10% - 30%
- Credit 5% - 25%
- Events 5% - 15%
- Certificates 10% - 30%
- Open Enrollment 25% - 50%
- Online 10% - 25%
- Conferences 10% - 40%



The screenshot shows the HHMI Virtual Cardiology Lab interface. It includes a navigation menu, a main content area with text and images, and a sidebar with various links and resources. The text describes the lab's focus on heritable diseases of the heart and provides instructions on how to use the virtual lab.



The screenshot shows the Transparent Language website. It features a search bar, navigation tabs for Personal, Education, Libraries, Government, and Free Resources. The main content area displays the "Word of the Day" section, which includes a word in Spanish ("requerir") and its English translation ("to require"). There are also links to various language learning resources and a "Word of the Day" section.



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### Promoting Online Courses

Stephanie Bowlin  
University of Richmond  
Richmond, VA

Kat Canella  
Columbus State University  
Columbus, GA

Darby Lanpher  
Harper College  
Palatine, IL

# Promoting Online Courses

LERN Annual Conference 2012

Stephanie Bowlin  
University of Richmond, Richmond, VA

Kat Cannella, CPP  
Columbus State University, Columbus, GA

Darby Lanpher  
Harper College, Palatine, IL

# Website Marketing

Connect. Discover. Get Started.



Three Clicks and You're There!


# Easy Access to Information

**Individual Course Details:**

- Syllabus
- Outline
- Cost
- Date
- Instructor Bio

**Easy to register:**

- Web
- Phone
- In Person at Harper




# Answers to Questions

**Never Feel Lost**

- Online FAQs
- Call-in Support
- Guided Registration

Seamless partnership means more enrollments, more classes, more successful completions.

*"Your education is important to you, and that's important to us."*



# Direct Marketing

- ➔ Email Promotion
- ➔ Postcards
- ➔ Flyers

# Direct Marketing ..... Email Promotion

- **Email local businesses and industry leaders**
  - Discounts for multiple employees
  - Customize package courses for employer
- **Email current students**
  - Upcoming courses in a series/certificate
  - Other courses of interest

## Direct Marketing Email Promotion



Image matches branding from website and catalog

Link directly to registration site

General information about class format

Are you interested in learning more about website strategies, mobile marketing and how to use social media for promotion? Do you prefer to learn from the comfort of your own home, on your own schedule? Come join the University of Richmond's School of Professional and Continuing Studies for an opportunity to learn a variety of marketing and communications topics online!

Upcoming courses include:

- Mobile Marketing
- Website Strategies
- Facebook, Twitter or YouTube for Business
- Google Analytics
- Online Advertising
- Marketing with Social Media
- Media Buying Strategies
- Video Marketing
- Creating Cell Phone Apps
- And more!

These online, instructor-led courses require only internet access and audio (speakers)

## Direct Marketing Postcards

- Send 3 - 4 weeks after print catalog
- Send again middle of term
- Catalog mailing list
- Highlight 1 course/program on front
  - Mention 3 additional courses on back

## Direct Marketing Flyers

**Quick!**  
**Inexpensive**  
**Easily updated**  
**Versatile**

- Use at events
- Mail to inquiries
- Post at libraries, coffee shops, businesses, public spaces

## Direct Marketing Flyers



Image matches branding of website, emails and catalog

Highlight similar classes

Provide easy-to-remember website

**LEARN ONLINE THIS FALL!**

Are you interested in learning more about website strategies, mobile marketing and how to use social media for promotion? Do you prefer to learn from the comfort of your own home, on your own schedule? Come join the University of Richmond's School of Professional and Continuing Studies for an opportunity to learn a variety of marketing and communications topics online!

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- Creating Cell Phone Apps
- And more!

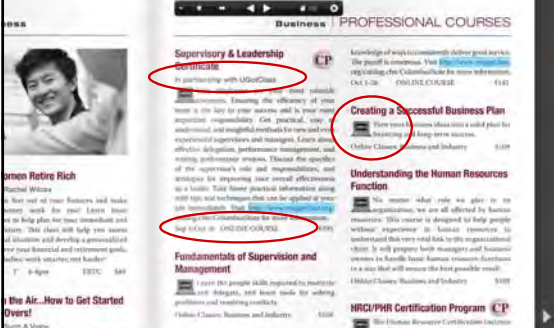
These online, instructor-led courses require only internet access and audio (speakers) to participate. In the online classroom, you will listen to audio lectures, view slides and even have instant access to text material. Post comments in the online discussion board with your fellow students and the instructor. Participate anytime day or night, as little or as often as you like!

**REGISTER ONLINE NOW!**  
spcc.richmond.edu/professional/communications

## Print Marketing

- Clearly identify a course as online
- Co-list online classes alongside face-to-face classes
- Same course offered concurrently in online AND F2F formats? OK.
- "Package" related courses
- Tell your students how online courses can meet their needs

## Print Marketing - Clear ID of Online classes



Supervisory & Leadership Certificate  
In partnership with UGA/Chase

Creating a Successful Business Plan  
There have been more than 100,000 small businesses in the United States since 1980.

Understanding the Human Resources Function  
This course is designed to help people acquire experience in human resources, to understand this very vital task in the organizational chain, to self-propose both strategic and tactical services in a health based human resource function in a way that will ensure the best possible result.

Fundamentals of Supervision and Management  
Learn the people skills required to motivate, delegate, and focus staff for selling, profiting and retaining products.

How to Get Started Over!

Business | PROFESSIONAL COURSES

## Print Marketing - Co-listing with F2F classes

This flyer features a red circle highlighting the text: "Save 50% off when you purchase this course with any of our face-to-face classes." The flyer is for a course titled "Create Your Own Website With Google Sites" and includes details about the instructor, course content, and pricing.

## Print Marketing - "Packaging"

This flyer features a red circle highlighting a promotional offer: "SAVE MORE! Take all three courses in the Marketing Essentials certificate for just \$999. Call Now: 877-267-6776 to enroll." The flyer is for a "Social Media Essentials Certificate" and lists several courses including "Social Media in Your Business," "Boosting Your Website Traffic," and "Achieving Top Search Engine Positions."

## Print Marketing - WIIFM

This flyer features a red circle highlighting the text: "25% of students will use their mobile devices while they are in class." The flyer is for "UGotClass" and promotes their online courses as superior to traditional classroom learning. It includes a testimonial and a call to action to sign up today.

## Social Media Marketing

- Make posts relevant
- Tie in with other marketing efforts
- Include links to articles or resources that relate to courses

## Social Media Marketing

This screenshot shows a Facebook post from Columbian State University. The post text reads: "What's your take on learning online? Have you tried an online class? This article from Forbes displays several concerns held by the skeptic of online learning. http://www.forbes.com/sites/guykawasaki/2012/05/24/the-myths-of-online-learning/?fbclid=IwAR130225\_member\_358979402". The post includes a photo of a woman and a link to the article.

## Social Media Marketing

This screenshot shows a Facebook post from Columbian State University. The post text reads: "We're still entering folks to win a FREE online class in Mobile Marketing! Just reply in the comments below for a chance to win! We will notify the lucky winner on Thursday." The post includes a photo of a laptop and a link to the course.

## Social Media Continued



## Contact Us!

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## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Ratios for Success

Fred Bayley  
Consultant  
LERN  
Forest City, NC

### 1. Big 3 Costs

- Promotion
- Production
- Administrative

### Institutional Costs are Contributions

Institutional costs come from funds used to support other institutional activities.

### 2. Important Finance Points

*Division:* Management tool that groups courses by the same subject, the same type of audience or participant, or the same format or length.

*Financially Self Sufficient:* Covering direct costs and your program administration costs or the “big 3 costs.”

### 3. Financial Format

<b>Income</b>	<b>\$</b>	<b>100%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>10-15%</b>
<b>Production Costs</b>	<b>\$</b>	<b>45-50%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>60%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>40%</b>
<b>Administrative Costs</b>	<b>\$</b>	<b>35%</b>
<b>Net</b>	<b>\$</b>	<b>5%</b>

Direct Costs = Promotion Costs + Production Costs

Operating Margin = Income - Direct Costs

Net = Operating Margin - Administrative Costs

### Unique aspects of financial format

- Promotion separated from production
- Percentages
- Operating Margin



**Example**

<b>Income</b>	<b>\$200,000</b>	<b>100%</b>
<b>Promotion Costs</b>	<b>\$34,000</b>	<b>17%</b>
<b>Production Costs</b>	<b>\$86,000</b>	<b>43%</b>
<b>Direct Costs</b>	<b>\$120,000</b>	<b>60%</b>
<b>Operating Margin</b>	<b>\$80,000</b>	<b>40%</b>
<b>Administrative Costs</b>	<b>\$70,000</b>	<b>35%</b>
<b>Net</b>	<b>\$10,000</b>	<b>5%</b>

**Divisions Format**

<b>Income</b>	<b>\$</b>	<b>%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>%</b>
<b>Production Costs</b>	<b>\$</b>	<b>%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>%</b>

**Individual Event or Course Format**

<b>Income</b>	<b>\$</b>	<b>%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>%</b>
<b>Production Costs</b>	<b>\$</b>	<b>%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>%</b>

**Avocational Ideal Percentages**

<b>Income</b>	<b>\$</b>	<b>100%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>10-15%</b>
<b>Production Costs</b>	<b>\$</b>	<b>45-50%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>60%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>40%</b>
<b>Administrative Costs</b>	<b>\$</b>	<b>35%</b>
<b>Net</b>	<b>\$</b>	<b>5%</b>

### Conferences Ideal Percentages

<b>Income</b>	<b>\$</b>	<b>100%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>10-15%</b>
<b>Production Costs</b>	<b>\$</b>	<b>35-40%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>50%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>50%</b>

### Seminars Ideal Percentages

<b>Income</b>	<b>\$</b>	<b>100%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>20-30%</b>
<b>Production Costs</b>	<b>\$</b>	<b>45-50%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>70%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>30%</b>

### CPE/Certificate Ideal Percentages

<b>Income</b>	<b>\$</b>	<b>100%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>10-15%</b>
<b>Production Costs</b>	<b>\$</b>	<b>35-40%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>50%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>50%</b>

### Contract Programs Ideal Percentages

<b>Income</b>	<b>\$</b>	<b>100%</b>
<b>Promotion Costs</b>	<b>\$</b>	<b>0-5%</b>
<b>Production Costs</b>	<b>\$</b>	<b>35-40%</b>
<b>Direct Costs</b>	<b>\$</b>	<b>45-50%</b>
<b>Operating Margin</b>	<b>\$</b>	<b>55-60%</b>

#### 4. Key Formulas

Use this data to analyze your programs.

1.	$\text{Total Registrations} \div (\text{Courses Offered} - \text{Courses Cancelled}) = \text{Average Registrations per Course}$
2.	$\text{Total Income} \div \text{Total Registrations} = \text{Average Course Fee}$
3.	$\text{Courses Cancelled} \div \text{Courses Offered} = \text{Course Cancellation Rate}$
4a.	$\text{Number Brochures} \div \text{Total Registrations} = \text{Brochure:Participant Ratio}$
4b.	$\text{Total Registrations} \div \text{Number Brochures} = \text{Response Rate}$

#### Key Formula Worksheet:

##### What you know

Income Generated	\$50,000
Registrations Generated	1,000
Courses Offered	125
Cancelled Courses	25
Brochures Distributed	50,000

##### What you calculate

1. Average Registrations per Course =	$1,000 \div (125-25)$	10
2. Average Course Fee =	$\$50,000 \div 1,000$	\$50
3. Course Cancellation Rate =	$25 \div 125$	20%
4a. Brochure:Participant Ratio =	$50,000 \div 1,000$	50:1
4b. Response Rate =	$1,000 \div 50,000$	2%

## 5. Budgeting Income or Enrollments for Courses

5.	$\text{Income Goal} \div \text{Average Course Fee} = \text{Registrations Needed}$
6.	$\text{Registrations Needed} \div \text{Average Registrations per Course} = \text{Successful Courses}$
7.	$\text{Successful Courses} \div (1 - \text{Cancellation Rate}) = \text{Courses to Offer}$
8.	$\text{Registrations Needed} \times \text{Brochure:Participant Ratio} = \text{Brochures to Distribute}$

### Planning Example

#### What you know

Average Registrations per Course	10
Average Course Fee	\$50
Course Cancellation Rate	20%
Brochure:Participant Ratio	50:1

#### Desired Target

Budgeted Income	\$150,000
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5. Registrations Needed	$\$150,000 \div \$50$	3,000
6. Successful Courses	$3,000 \div 10$	300
7. Courses to Offer	$300 \div (1-.20)$	375
8. Brochures to Distribute	$3,000 \times 50$	150,000

## 6. Creating Budgets

Use past analysis for good budgets that lead to good realities. Start with projected income and end with administrative cost.

Target Income	100%
<b>Step 1</b> Net or Surplus	5%
<b>Step 2</b> Refunds	3%
<b>Step 3</b> Promotion Costs	12%
<b>Step 4</b> Production Costs	45%
<b>Step 5</b> Administrative Costs	35%



## LIFELONG LEARNING 2012

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### The 10 Best Promotion Strategies of the Year

William Draves  
President  
LERN  
River Falls, WI

Paul Franklin  
Consultant  
LERN  
Portland, OR

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

# Top Ten Promo Ideas for 2012

*From their annual packed session at the big LERN Conference, here are the top ten promotion ideas of the year from marketing experts Suzanne Kart, Paul Franklin and William A. Draves.*

## **1. Create a Facebook fan page for your most popular course/program.**

*Suzanne*

Create a Facebook fan page for your most popular course/program – and let participants post to it. It's a way to keep current and past participants engaged and show potential participants what kind of experience they'll have. One example is Central Community College's Ghost Hunting program.

## **2. Use Amazon.com as a major tool when writing copy.**

*Paul*  
This from a master copywriter friend of mine when I asked him the best and most uncommon tool he uses for writing copy for direct marketing appeals. Use Amazon.com as your first stop and major tool when writing copy for new programs and events.

## **3. Use demographic, not psychographic data.**

*Bill*  
Don't use psychographic data until LERN says it is beneficial. Psychographic data, for example categorizing your customers as Free Spirits or the Uninspired, is not useful, wastes valuable staff time, and is costly and unproductive for your marketing efforts.

## **4. Get QR codes on printed pieces.**

*Suzanne*

Get QR codes on your printed pieces whenever possible and link back to your mobile-optimized web page.

Super simple to do and it's another way to drive traffic to your website.

## **5. Use your brochure real estate wisely.**

*Paul*  
All real estate is not created equal. We know this but don't always apply it to how we organize events in catalogs. Retail cataloguers not only know this rule but practice it.

For example, they know the best pages to place their hottest items and/or new items they are pushing are inside cover, first two product pages, two middle pages, last two product pages and inside and outside back cover.

## **6. Webinars.**

*Bill*  
Offering Webinars, generally for free, is the top sales lead strategy for business, reports LERN's Julie Coates. Use webinars to promote to your individual customers too. They can be particularly effective for higher-priced programs. For example, do a webinar to introduce your Summer camps, like a 'virtual' open house. Unlike a sales presentation, you give 45 minutes of great information, then take questions, and then make a 2-3 minute sales pitch at the end.

## **7. Use Twitter lists.**

*Suzanne*  
Use Twitter lists to group people who may be of interest to your key constituents. For instance, I've started a list of people I know will be at the

LERN Conference. As I find more people I'll add them to the list. People can follow this list and become more engaged. Also, if you had, say, a popular photography program, you could create a list of participants and/or instructors who could then occasionally upload pics to Twitter to share, etc.

## **8. Invest in print brochures.**

*Paul*  
Data from the catalog industry only reinforces why it so important that we continue to invest in printed catalogs and brochures. Printed catalogs are the biggest factor in generating online customer orders. In a USPS study of consumer behavior – consumers who receive catalogs:

- Are more likely to become multi-buyers online
- Account for 15% more transactions than those who did not get a catalog

## **9. List online course with your face-to-face offering.**

*Bill*  
LERN has found no competition between our in-person offerings and our online offerings on the same subject. Some people want the face-to-face offering, while others want the online format. So test listing an online course on the same subject just below or with the description for the face-to-face offering. The online listing will cost only a few dollars in brochure space, and has a significant upside in revenue and registrations.

## **10. InfoGram.**

*Bill*  
From the continuing education program at the University of Western Ontario, the InfoGram conveys statistics in a visually striking and pleasing way. Data and statistics are great tools to convey information, and when combined with a chart and color and design, they make an even bigger positive statement.

# Ten Best Promotion Ideas for 2011

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By Paul Franklin, Suzanne Kart, and William Draves

From this year's big annual LERN conference, here is the 16th annual list of Ten Best Promotion Ideas of the Year. The session was packed. Here are the latest most advanced marketing and promotion techniques for the field.

## 1. Invite them back

Go back now to your participants who quit coming when the recession hit. Assume things are getting better. In an individualized letter, tell them you want them back. Offer them a free class or a steep discount to come back. Tell them what you have available that they should be interested in given their past registrations. Give them a personal contact by name to call to register. Send the letter three times a year. You will get enough responses each time to make the effort profitable and get some good customers back.

## 2. Discounts work!

Discounts are working for many programs. While you want to raise your prices, at the same time you can generate additional revenue by offering special discounts.

Discounts are being successfully offered at times and to audiences where it is a big win for your organization. For example, successful discount campaigns have been done in off-peak registration days, and to

audiences who have not participated. Here's a good example:

Pamela Gilley at the Continuing Legal Education program for the State Bar of Texas, Austin, offered a \$100 discount on any course or event and then tested two different email subject lines with customers who had not taken a course in the past three years. The email brought in \$16,000 in two days, income they would not otherwise have had.

Especially in these tough economic times, discounts work. Everyone should be offering something for a discount. You should be offering a discount on something. Promote it with email. Reap the rewards. In these tough times, discounts work.

## 3. 12 Days of Deals

Beginning right after Thanksgiving, 2009, Kathy Brady at the Learning Connection in Providence, RI, began an ePromotion strategy in which customers would receive 12 emails with 12 separate deals before Christmas. Customers didn't know when the deals would come or what they would be. Some examples include:

- Nov. 30, 10% off
- Dec. 2, Register for classes and if you spend over \$100 you will receive \$10 off your total.
- Dec. 5, Register for classes and if have more than 2 classes in your shopping cart, receive \$5 off your total.

- Dec. 15, Save 10%

The end result was that Learning Connection did 75% more business on Dec. 24, 2009, than the same day in 2008, because a 30% discount was offered that day. Sales for the whole period were up 14% - despite a recession.

## 4. Use a serif type font

For the first time this year we are seeing many brochures using a sans-serif type font. But research done by LERN's brochure guru Julie Coates says that a serif type font, like Times New Roman, is still more easily read for the body of copy in your print brochure.

Serif is more readable for young people in Gen Y as well as those in older generations, Coates reports. So even though people are seeing lots of sans-serif type fonts on the web, the serif (little tails) fonts are still more readable in the print brochure. To summarize,

**Print:** Body copy in serif; headline copy o.k. in sanserif

**Screen:** Body copy in sanserif; headline copy o.k. in serif

## 5. Boost prices selectively

Maybe the biggest lesson our field learned from the recession was to boost prices selectively, not to lower them. Programs that raised prices fared much better than programs



that did not raise their prices. And programs that lowered their prices universally got killed, with both registrations and income dropping dramatically.

Price each course and event individually. Raise your prices to just below the next price break. If you have courses or events with a waiting list or lots of enrollments, raise the price. If you have a course that only has a few people and could be dropped, raise the price.

## 6. Mobile Apps

A mobile app – or application - is software that is designed to run on handheld computers, personal digital assistants (PDAs), enterprise digital assistants (EDAs), smartphones, iPhones, and cellphones. The same web page that is efficient for someone surfing the web on a PC is difficult to use with the small screen of a handheld device. If you want to access something like Facebook or Twitter from your iPhone, for instance, using a mobile app will format your Facebook or Twitter information so it's easier to read and manage.

CTIA – the international association for the wireless telecommunications industry – reports that 91% of adults use cell phones. The Pew Research Center reports that in 2010, 40 percent of adults use the internet, email or instant messaging on a mobile phone (up from the 32% of Americans who did this in 2009.)

It's clear the shift from adults using cell phones just to call people to using cell phones to access the Internet is happening. Some ways lifelong learning programs could utilize mobile apps? Registration purposes, accessing information, and social networking.

## 7. Web site optimization

Similar to using mobile apps, web site optimization means your web site can be easily viewed on browsers installed on cell phones and PDAs, such as Safari. If someone decides to go to your web site and you don't either have a mobile app or web site optimization, you risk losing their registration.

## 8. Test your web site pages

First mentioned by eMarketing expert Dan Belhassen of Modern Earth in Winnipeg, we now have the first continuing education program to actually test a web site page.

It was conducted by the marketing person at McMaster University, School of Continuing Education, Hamilton, Ontario, Canada.

As far as we know, this is the first web page in our field to be tested against another version of the same web page.

The program tested whether small graphics on the right hand side of the screen for their top 3-4 offerings made a difference in the number of people clicking through to them. The test results showed that the web page with the small graphics got more people to click into the site than the other one. Google Optimizer is 98.5% sure.

Being able to test one version of a web page with another one is a pioneering new technique for our field.

## 9. 'Selling' courses with personal invitation

Two organizations this year used a personal 'selling' approach, and both events sold out.

Sandra Parker from the Insurance Brokers Association of Canada reported a key marketing component

in establishing a new targeted program was having the association's CEO make phone calls to members to leverage the relationship and heighten the value of the meeting.

This individually targeted invitation approach may be a new successful strategy for certain kinds of high-value targeted and high-priced small meetings.

LERN's Greg Marsello also used the technique to send a written invitation to 100 people for our Executive Leadership Institute.

Parker also raises the intriguing question: Is direct mail and eMarketing enough, or do organizations now need to incorporate selling as a third way to generate registrations and income for higher-priced events?

## 10. Tweet ups and Tweet chats

A Tweet up is where people meet in a face-to-face environment, like a coffee house, and then they all tweet about it using a hash tag. A Tweet chat is a virtual conversation using hashtags that happens at a designated time (but the Tweeters are not all at the same location). Both can be effective ways to engage and connect with our customers.



# All-time top 20 best marketing ideas

From our annual list of the best promotion ideas of the year, LERN's Paul Franklin, our regular marketing columnist, put together his personal "all-time" favorite top 20 best marketing ideas, relevant for your program right now — today.

## **\*\*20. Mail earlier.**

Mail earlier for all of your classes and events. Mail one to two weeks earlier than your normal pattern, and discover how well it works.

## **19. Mail to those who used to come.**

Find those who attended three to eight years ago and "beg" them to attend again. Give them a special incentive or recognition to come back.

## **\*\*18. Mail 3 times to your best customers.**

When doing seminars and conferences, mail three times to your best customers. For community programs, mail twice to your best customers.

## **17. Your best list is your in-house list.**

The list of names that is best for your program is your own in-house list of past participants, PLUS anyone who inquires about your program.

## **16. Find their preferred portals.**

A portal is how they like to be reached, such as fax, email, direct mail, phone. Find out how your participants want to be reached, then use that medium.

## **15. Start post-event marketing.**

Retention is the key to future success and profitability. As soon as your event or session is over, tell participants it was successful and tell them to come again.

## **14. Hype your presenters more.**

Most presenters are a lot better than the descriptions about them. Hype up your

presenters. Tell your people they are getting the best presenters.

## **13. Have a one-year marketing plan.**

Have it in writing. Develop a timetable by month so everyone knows what has to be done each month. Set your objectives in terms of numbers.

## **\*\*12. Do registration analysis.**

Improve performance by looking at the numbers. Study when people register; where people register; how people register; by event, by division, by location.

## **11. Have cutting-edge content.**

Good promotion can't sell an event that doesn't have cutting-edge program content. Some 20 percent or more of the content should be new every year.

## **10. Expand marketing if...**

Expand your marketing in tough times IF the promotion is a) targeted; b) if you are getting a good return; or c) if the audience responds well to your promotions.

## **9. Focus on a great brochure.**

The brochure generates 80% or more of your registrations. Focus on a great brochure. Keep that four-color cover. Do not lessen brochure quality.

## **8. More brochures rather than fewer.**

If faced with the decision between more pages in your brochure, and more copies, choose to print more brochures with fewer pages.

## **7. Micro-track and analyze segments.**

Divide those to whom you mail into the lowest common denominator — like six-digit SIC codes. Mail again to those segments that respond well.

## **6. Track web site hits using alias URLs.**

Use different URLs or domain names



in different promotions. Have the alias URLs come to your regular website. Then track which URLs pull best to track your promotions.

## **5. Provide more website information.**

Use your web site to provide more information about an activity, class or event than you can fit into the promotional print brochure.

## **4. Follow AIDA in web site writing.**

In writing copy for your web site, follow the AIDA principle used in brochures: Attract, Interest, Desire, Action.

## **3. Write emotional copy.**

Power up your copy by appealing to human emotions. Appeal to their wants, their desires, and use less-frequently used words.

## **2. State your USP.**

Your USP is your Unique Selling Proposition. It is what makes your program different from all the others. In all your promotions, say why you are different.

## **\*\*1. Know your 7 primary segments.**

Only seven segments of your mailing list give you 80% of your income. Know your 7 primary audiences by their demographic characteristics.

*\*\* Paul's designation as doubly-important.*



## LIFELONG LEARNING 2012

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# Building Your Strategic Plan

Greg Marsello  
Vice President  
LERN  
Tiverton, RI

# Building Your Strategic Plan

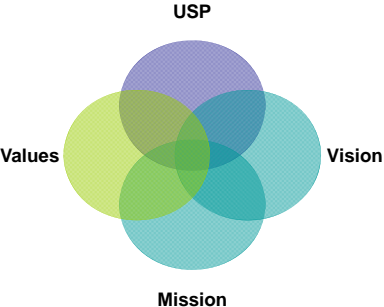
Washington, D.C. Conference 2012  
Greg Marsello



## Two Plans




## Your Foundation



## Strategic Plan

- 2-5 years
- Updated yearly
- Who you are
- Benchmarks
- Initiatives
- Guides OYMP



## Strategic Planning Components

### Organization Narrative

- A high-level description of your organization. History. What you do? Important components of who you are.

## Strategic Planning Components

### Mission Statement

- Why you exist.



## Strategic Planning Components

### Value Statements

- Customer, staff, and business statements.



## Strategic Planning Components

### Unique Selling Proposition

- The characteristics of your organization causing new people/clients to participate and past participants/clients to repeat.

### Environmental Scanning

- What is going on in your "community"/the territory you serve?



## Strategic Planning Components

### SWOT Analysis

- What are your strengths, weaknesses, opportunities, and threats?



## Strategic Planning Components

### Key Data

- Finances
  - \*Your financial performance the last three years.
- Benchmarks
  - \* The benchmarks you track and your performance the last three years.
- Market Segments
  - \* Your seven primary market segments.

## Strategic Planning Components

### Competition

- Analysis of your top 3-5 competitors.



## Strategic Planning Components

### Major Initiatives

- What major initiatives (will generate \$100,000+ by year 3) are you working on?  
NOTE: LERN's 8-Step Needs Assessment Model is designed to help with this process.

## Strategic Planning Components

### Areas to Address

- Finances/Budgeting
- Needs Assessment
- Program Development
- Pricing
- Marketing/Promotion
- Operations
- Customer Support
- Staffing/Staff Development
- Communication Systems
- Evaluation
  - What actions need to be taken in each of the areas (and other appropriate areas) to improve performance?

## Strategic Planning Components

### Strategic Plan Actions

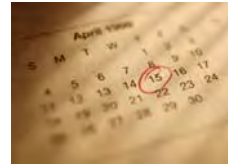
- The long range action steps you will be taking.



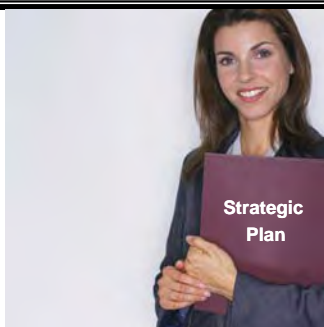
## Strategic Planning Components

### Strategic Plan Timeline

- The long range action step timeline you will be following.



## Strategic Plan Example



THANK YOU!



GREG MARSELLO

[www.lern.org](http://www.lern.org)



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### Generational Communication in the Workplace


Kassia Dellabough  
Consultant  
LERN  
Eugene, OR

## Generational Communications in The Workplace




I need to Communicate more effectively

presented by  
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LERN Senior Consultant



2012 Annual Conference 1

## Generational Communication



Did you get my e-mail?      I sent a memo      This is a waste of time, I have work to do

What happened to the work ethic?      Were you at the meeting?

Wassup?      He texted me that he can't make it

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## Emerging Issues in the Workplace



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"A large majority of my interviewers were baby boomers well into their careers, some at the edge of retirement," says Robertson. "Many of the interviewers did not understand my windy path through employment, which is, of course, a characteristic of my generation. They didn't understand I wasn't looking for one job for the rest of my life and that I wasn't looking for money and status."

Read more at  
<http://www.thefiscaltimes.com/Articles/2011/11/11/Gen-Y-vs-Boomers-Workplace-Conflict-Heats-Up.aspx#BhaOryhsYzUOmpwR.99>

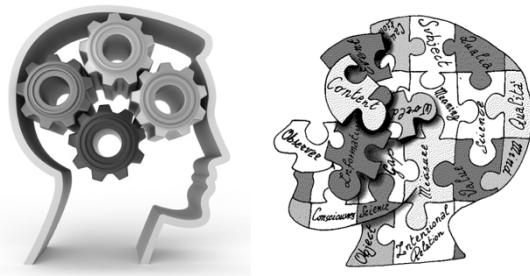
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## Core Issues

- Autonomy or Collaboration?
- Work-Life Values
- "appropriate" Use of Technology
- Delayed Retirement
- Career Goals

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## Communication





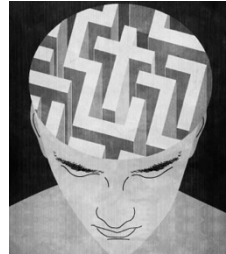
## The Basics

*Do employees understand how work is done differently in different generations?*

*Do employees understand customer needs, interaction and work styles from different generations?*

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## We Absorb Information Differently



- Sensory
- Gender
- **Generational**
- Ethnic & Cultural
- Neurological
- Emotional, etc.

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## Defining the Generations\*

**Seniors**  
 1920 – 1944  
**Baby Boomer**  
 1946-1964  
**Generation X**  
 1965-1980  
**Generation Y**  
 1981-2000  
**Generation Next? I, X, G**  
 2000- now

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## GENERATIONS: The Cohort Experience

Members of a generation are linked by experiences shared during their formative years. These shared experiences contribute to the creation of shared values, attitudes and behaviors.

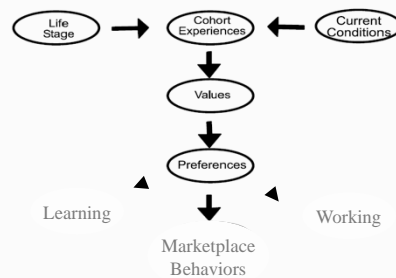
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## What Were YOU doing in High School?

- Favorite music
- Values:
  - Work, sexual behavior, drugs, dress
- How did you refer to your teachers?
- What did you do after school?
- How did you stay in touch with your friends?
- What was the political climate?
- What were your career goals?
- What was the job outlook?
- What was the technology of the day?

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## Generational Influences



© Yankelevich Report, 1997

## Generation Gaps

- Attitudes
- Expectations
- Perceive Differently
- Learn Differently
- Teach Differently
- **Work Differently**

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## Be Wary of Stereotyping

Although certain characteristics may be attributed to one generation or another, that doesn't mean that all people in a particular generation exhibit each of that generation's common characteristics.

**Avoid rigid stereotyping!**

Cultural, Geographic and Ethnic background experience generational characteristics differently

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## Inventions That Changed the Way We Communicate

- The car
- Telephone
- Airplane
- Answering machine
- Computers
- E-mail
- Cell phones
- Digital cameras
- Cloud computing

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## Seniors/Traditionalists

- Lindbergh Flight
- Stock Market Crash
- Depression
- FDR
- The New Deal
- Social Security
- Pearl Harbor
- Korean War

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## Daily Life and Society:

- Prosperity
- Stability
- uniform

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## Transition from Agriculture to Industry

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**TRAINING THE BABY**  
Parents give much attention to teach

Washington—When the baby is 7 months old and the doctor about 12 weeks ago, you should be ready to teach a few more things. The baby should be able to sit up and hold a spoon in his hand. He should be able to walk and talk. He should be able to play with blocks and other toys. He should be able to understand simple words and follow simple directions. He should be able to play with other children and get along with them. He should be able to play with blocks and other toys. He should be able to understand simple words and follow simple directions. He should be able to play with other children and get along with them.

**READY'S DEED**

Washington—The baby has just had his first birthday. He is now 12 months old. He should be able to sit up and hold a spoon in his hand. He should be able to walk and talk. He should be able to play with blocks and other toys. He should be able to understand simple words and follow simple directions. He should be able to play with other children and get along with them.

**Do with less—so they'll have enough!**

**WE CAN WE MUST!**  
1947 U.S. WAR SAVINGS BONDS & STAMPS

**SOMEONE TALKED!**

**Loyal, the recycling generation**

**MAKE THIS PLEDGE:**  
I pay no more than top legal prices  
I accept no rationed goods  
without giving up ration stamps

**UNITED STATES OF AMERICA**  
War Ration Book One

**WE ARE COOPERATING**  
With the 400,000,000 Americans who are keeping  
THE HOME FRONT PLEDGE

## Generational Values

- Dedication/sacrifice
- Hard Work
- Conformity
- Law and Order
- Respect for Authority
- Patience
- Delayed reward
- Duty before pleasure
- Following the rules
- Honor
- Work hard and earn retirement

## Seniors Communication Styles

- Good manners and respectful interaction is essential.
- Proper grammar and appropriate language. When this rule is broken, credibility goes out the window.
- Off-color language or humor is highly disrespectful.
- Pleasant but not "personal." Sharing personal stories or anecdotes can be a great way to illustrate a point or to communicate an idea, but too much intimacy is a negative.
- Don't put them on the spot or do anything that could be embarrassing.

## What Communication Technology Impacted Senior Generation?

- Newspapers
- Magazines
- Radio

**Variety AND Quality!**  
Shop for BABY  
SPECIAL WEEKLY

BUTTER - 55¢  
SOUPS - 6¢  
SHORTENING - 59¢  
PEAS - 10¢  
FLOUR - 3¢  
ORANGES - 2-59¢  
TOMATOES - 19¢  
CHARMIN - 4-29¢  
COOKIES - 5¢  
WE GIVE GREEN STAMPS

## The Baby Boomers

- Born: 1946-1964
- McCarthy Hearings
- Polio Vaccine
- Rosa Parks
- Sputnik
- First Nuclear Power Plant
- JFK
- Peace Corps
- Cold War
- John Glenn
- Vietnam
- Martin Luther King
- Woodstock
- Kent State

## The Boomer Personality

- Service Oriented
- Driven
- Willing to go the extra mile
- Good at relationship
- Want to Please
- Good team players
- Not budget-minded
- Don't like authority "don't trust anyone over 30"
- Demand fairness
- Entitled
- May put process ahead of result

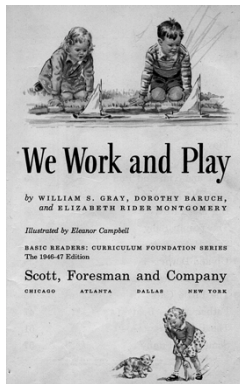


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## Core Values

- Optimism
- **Work**
- Team orientation
- **Work**
- Personal Gratification
- **Work**
- Health and wellness
- **Work**
- Personal growth
- **Work**
- Youthfulness
- **Work**
- Involvement
- Uniqueness

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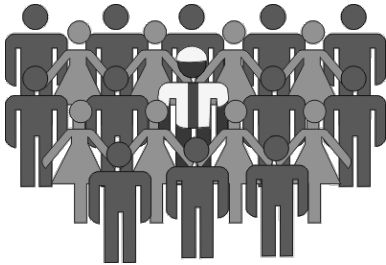
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## Boomers in School



Tests during freshman days.

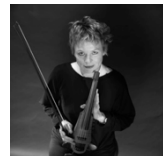
## Stand Out From the Crowd



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## Boomers

- Want to be special
- Be doing important work
- Enjoy process and connection  
Have a wealth of experience to tap
- Are passionate about what they do  
(if they are not burnt out!)



Laurie Anderson

## Perpetual Youth

- Most boomers believe they look and feel 20 years younger than they actually are.
- AARP: from *Modern Maturity* to *My Generation*: Lauren Hutton declares, "60 is the new 30."



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## Boomers Are Driving The Health Industry

- Ginseng, Garlique
- Ginkgo
- Viagra
- Black Cohosh
- Cosmetic Surgery



## Generational Characteristics

- Boomers are busy and willing to stay after hours to do the job
- **Boomers aren't seniors. Never, ever, make that mistake**
- Boomers think they are still "cool"
- Fun and different are important
- Boomers want to create community and make a difference
- Compete and climb the corporate ladder



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## Boomers Communicating

- Networking is key
- Value writing skills
- "Not all that is new is progress"
- Sometimes a face-to-face conversation is the most effective way.



## What Communication Technology Impacted The Boomers?

- Color television
- Answering machines
- Faxes

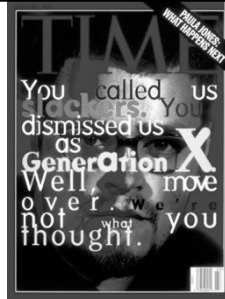


Now, enjoy all the excitement of color in the brightest, most true-to-life RCA Victor Color TV ever...from 1959!

## Understanding Generation X



Photo, Courtesy of Grease, Tattoos from Grease, St. Paul Minnesota (<http://tattoosfromgrease.com/>)



I AM NOT A BABY BOOMER!  
**Work "under the radar"**

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## The Gen X Growing Up

- Street Savvy Survivors
- Psychedelic parents, divorces, one-parent families, step families, both parents working, razor blades in their Halloween candy, latchkey lives, violence on television, on the streets, and in the schools.
- The toughest generation since the G. I. Generation.

Source: Karen Ritchie, *Marketing to Generation X* <http://chamber.gnofn.org/fishman/xer.html>

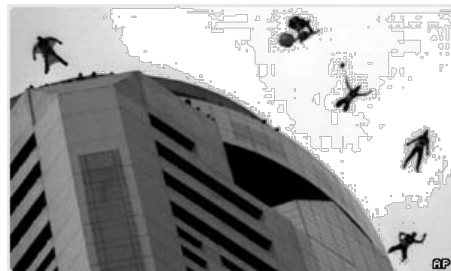
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- Crack
- AIDS
- Downsizing and layoffs
- Gangs
- Urban Deterioration
- Political leaders without integrity
- The great U-turn of the economy



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## Work Hard, Play Hard



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## The Ultimate Honeymoon



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## In The Workplace



- Focus on Benefits
- Authentic
- Straight Talk
- Image is Nothing
- Productivity is efficient use of Time
- Wish Boomers would retire

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## Generation X: Values and Characteristics



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## Generation X: Values and Characteristics

- Work can happen anywhere—even at home
- 8-5 is your time
- After 5 is my time
- It doesn't matter how you do it, as long as you produce what is required
- Process not as important as outcome
- **Never confuse having a career with having a life**

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## Generation X Communication

- Highly Visual
- Easily bored
- Relevance
- Back to basics
- Computers
- Multi-tasking
- Let's Get it Done!



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## What Communication Technology Impacted Gen X?

- Zines (pronounced "zeens")
- Computers
- Video Gaming



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## The Millennials Gen Y



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## Who is Generation Y?



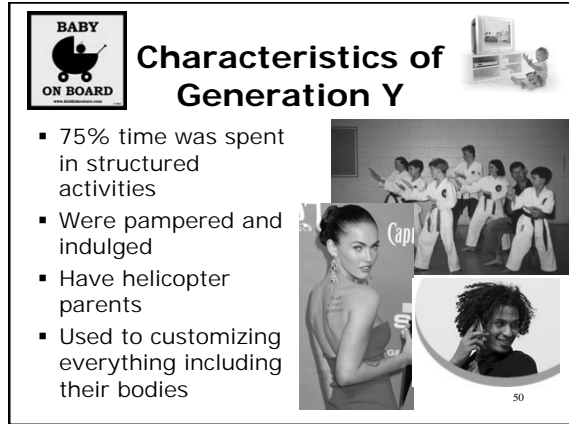
CLASS OF 1111011010

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- 78 Million People
- Technology Savvy
- 20,000 TV commercials/year since birth
- Most media savvy generation
- Confident
- Optimistic

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### Characteristics of Generation Y

- 75% time was spent in structured activities
- Were pampered and indulged
- Have helicopter parents
- Used to customizing everything including their bodies

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### Characteristics of Generation Y

- Bigger than Baby Boom Generation
- 3 times the size of Gen X
- Roughly 26% of population
- Diverse
- Inclusive
- Powerful
- Weak on interpersonal skills
- Cyber Activists
- Support social causes
- See themselves as peers and colleagues




Tom  
"TJ"  
Male  
30 years old  
Santa Monica, CALIFORNIA  
United States  
CEO  
View More Pics

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### Communicating with Gen Y

- Lively and varied
- Visually similar to Xers—multiple focal points
- Ask for input they have ideas and have not experienced much hierarchy
- Use lots of humor/animation/comics
- **Don't assume** they are being disrespectful from how they look or talk



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### Communicating with Gen Y

- Teamwork and technology
- Technology is "as natural as air."
- Want Mentors who know more than they do
- Big-Picture Learners
- Highly visual (especially boys)
- Active (kinetic) learners

Source: Training Magazine, Bill Communications, Inc. Minneapolis, MN

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### What Communication Technology Impacted Gen Y?

- Cell Phones
- Internet
- On-line Social Networks

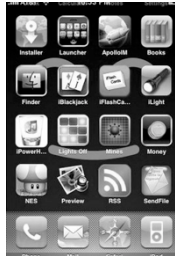


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## Cell phone or Computer?



A long way from DOS...

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## It's Just a Tool!

Savage Chickens by Doug Savage

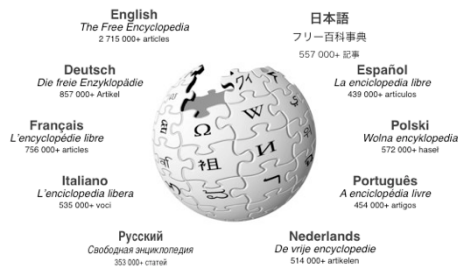


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## Who has the access to information now?

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## WIKIPEDIA



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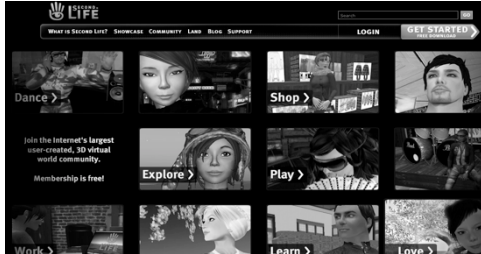
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UC Berkley  
CUNY  
Stanford  
Harvard  
MIT etc. etc.!

**Coursera**

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## Secondlife.com



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## Training Environments in Second Life.Com



## Preferred Communication Tools

- **SENIORS:** face-to-face, phone (land-line), U.S. mail, newspapers, magazines
- **BOOMERS:** email, phone, face-to-face, newspapers, magazines, on-line resources
- **GEN X:** web sites, email, on-line newspapers & resources, cell phone
- **GEN Y:** Facebook (etc.), Text, Cell Phone, web sites, skype
- **GEN NEW - ?**

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## WORK ENVIRONMENT

	Seniors	Boomers	GenX	GenY
<b>Slogan</b>	"Keepers of the Grail"	"Thank God, its Monday"	"Work to Live"	"Upcoming Optimists"
<b>Tech.</b>	Unsure and resistant	Willing to learn	Techno Savvy	Techno Natives
<b>Feeling toward supervisors</b>	Respectful of authority	Non-authoritarian	Dislike close supervision	Respectful of Traditionalists
<b>Provide</b>	Stable environment	Personal challenges	Feedback	Structure

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## Goals...

	Goal
Seniors	"Build a Legacy"
Baby Boomers	"Build a Stellar Career"
Generation X	"Build a Portable Career"
Generation Y	"Build Parallel Careers"

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## Institutions...

	Institutions
Traditionalists	"Deserve loyalty"
Baby Boomers	"Deserve to change"
Generation X	"Are suspect"
Generation Y	"Should be judged on their own merit"

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## Rewards...

	Reward
Seniors	"Satisfaction of job well done"
Baby Boomers	"Money, title, recognition"
Generation X	"Freedom!"
Generation Y	"Work that has meaning"

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## Career Path...

	Career Path
Seniors	"Job changing has stigma"
Baby Boomers	"Job changing puts you behind"
Generation X	"Job changing is necessary"
Generation Y	"Doesn't need to be a straight line"

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## Feedback...

	Feedback
Seniors	"No news is good news"
Baby Boomers	"Once a year whether needed or not"
Generation X	"So, how am I doing?"
Generation Y	"From virtual coach at touch of a button"

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**Questions?**  
**dellabough@lern.org**

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## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Online Advertising with Google and Facebook Ads

Dan Belhassen  
Modern Earth  
Winnipeg, MB

## Online Advertising with Adwords and Facebook

Dan Belhassen  
greatBIGnews.com  
Modern Earth Inc.

### About your presenter

- Dan Belhassen
  - Founder and President of Modern Earth Inc., an Internet technology company
  - Website creators, online software developers, search engine consultants, elearning specialists, mobile developers, new media marketing specialists
  - Find me in my booth if you want to follow up
  - Presentation available at <http://modernearth.net/lern2012>

### Traditional Online Advertising

- Banners



- Downsides

- No self service
- Typically cost per thousand impressions (CPM)
  - Not results based
  - High cost
- Visitors started “ignoring” banner ads

### Better Advertising



### How AdWords is Different

- ✓ Self service
- ✓ Market priced (bidding)
- ✓ Integrated analysis



### History of Google Advertising

- Engineers created an early version of adwords
  - Weren't sure if people would use it
- 1<sup>st</sup> ad within minutes..
  - “live mail order lobsters”



## History of Google Advertising

The rest is history.. \$37 billion (10 billion Profit!)



## The AdWords Model

- Pay per performance
  - Pay per click (PPC)
- Fully “self service”
  - Setup and manage 24x7
- Results oriented
  - Intensive reporting



## Your 1<sup>st</sup> Adwords Campaign

- Step 1: Create a Google Account
  - Allows you to access AdWords
  - Can also be used for other services such as Analytics
- Google.com/adwords

## Your 1<sup>st</sup> Adwords Campaign

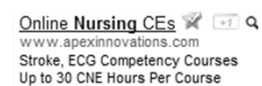
- Step 2: Select Languages
  - Determine which languages to target
    - A visitors “home” language

## Your 1<sup>st</sup> Adwords Campaign

- Step 3: Select Geography
  - What cities and states should your ad be displayed in?
  - You can select multiple city/state combinations
  - You can also target other countries

## Your 1<sup>st</sup> Adwords Campaign

- Step 4: Ad Text
  - Three lines
    - Title
    - First line
    - Second line



### Your 1<sup>st</sup> Adwords Campaign

- Step 5: Select Keywords
  - Potential keywords from your site presented
  - Select as many keywords as possible
    - “Cast a wide net”
  - Add in other keywords you can think of
    - Synonyms
    - Common misspellings

### Your 1<sup>st</sup> Adwords Campaign

- Step 6: Set Daily Budget
  - Maximum spend per day
  - Does not guarantee full spend
    - Depends on other factors

### Your 1<sup>st</sup> Adwords Campaign

- Step 7: Traffic Estimator (and bids)
  - Your goal is to spend as little as possible for best results!
  - How much are you willing to bid per click?
  - How much are you willing to pay by month?
  - How much traffic do you want to receive?

### Advanced Adwords

### Advanced Adwords

- We’ve seen a simple example
  - One ad
  - One target geography
  - One target audience
  - But, a “good” marketing campaign will be more complex

### Advanced Adwords

- Typically will have multiple of demographics
  - Interest areas
  - Geography
  - Motivation



### Advanced Adwords

- Interest Areas
  - What courses are they interested in?
    - eg: photography, nursing credits, sales training, etc.
    - Is it business or leisure related?
  - Maybe they don't know!
    - eg: adventure based leisure activity
    - eg: improving company sales

### Advanced Adwords

- Solution - Multiple campaigns

### Advanced Adwords

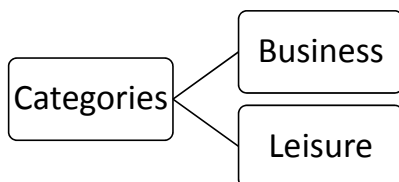
- Multiple campaigns
  - Each campaign can have
    - A daily budget
    - A set of geographical targets
    - A series of ad groups
  - Each ad group can have
    - Multiple text ads
    - A list of keywords

### Advanced Adwords

- Determine geography
  - Select by country, state and city
  - Drill down to specific postal codes- Note – large programs or online programs
  - Set up multiple campaigns to target different courses in different geographies

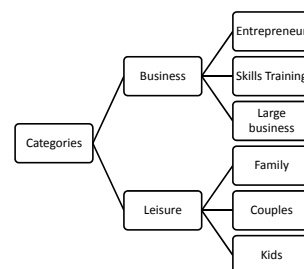
### Advanced Adwords

- Example campaign set up



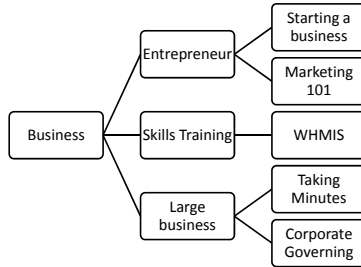
### Advanced Adwords

- Separate into interest groups



## Advanced Adwords

- Identify courses (business)



## Advanced Adwords

- For each course, identify keywords
  - Identify as many keywords as possible (misspellings!)

Course (ad group)	Keywords
Marketing 101	Marketing for dummies, small business marketing, marketing for small business, marketing ideas
WHMIS	whmis, online whmis course, whmis course, whimis course
Corporate Governing	how a board operates, corporate board, board governing, taking minutes, roberts rules of order

## Advanced Adwords

- For each ad group (course), create three ads
  - Try to use keywords in ad
  - Ads should appeal to different viewpoints/demographics

Marketing for Dummies  
5 week course  
Great results!

Small Business Marketing  
Techniques exposed!  
5 weeks to more profit!

Beat the recession!  
5 week course reveals  
secrets for your business

## Advanced Adwords

- That's a whole lot of ads!
  - Right! You would end up with lots of ads
  - BUT – each week you would find the worst performing ad and replace it with a newly worded ad
    - Keep evolving the ads to increase your conversion rate

## Even more advanced...

- Google content network
- Allows your ads to be promoted on thousands of websites
  - You can target which websites your ads show up on

## Even more advanced...

- Google content network
- Different types of ads
  - Image ads
  - Local business ads
  - Mobile ads
  - Click to play video ads

## Facebook Advertising



### The Myth:

Facebook is only used by kids.



### The Reality:

✓ 30% of users are 35+



### Nearly ubiquitous

- 900 million active users
- 50% log in daily
- 130 "friends" per user
- 57% female / 43% male



Global friends... visualized

## Not everyone likes Facebook

Love it, Hate it..

Can't ignore it.



<http://facebook.com/advertising>

## Sample Facebook Ad



- Title / link
- Image
- Ad copy (text)

## Designing an effective ad

### Facebook ad setup

1. <http://facebook.com/advertising>
2. Destination (URL or page)
3. Target geography
4. Demographics (age, gender)
5. Likes & interests
6. Relationship status, languages, education

## Designing an effective ad

### Facebook ad setup

7. Schedule
8. Pricing (CPM vs CPC)
9. Bid

## Designing an effective ad

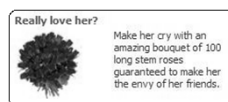
### Experiment with ad text!

## Designing an effective ad

### Experiment with ad text!

#### Ad text for a flower shop

- Target market: men to women
- Target ad to men aged 30+



## Designing an effective ad

### Experiment with ad text!

#### Ad text for a flower shop

- Target market: women to men
- Target ad to women aged 18-40



## Designing an effective ad

- Key difference between Facebook and Search Advertising
  - Facebook users AREN'T SEARCHING!
    - Don't expect high click through rates
  - You need to capture their attention

## Example ads

- From an online case study



- Which ad got more clicks?

## Example ads

- From an online case study



- Ad testing is critical!
- But... which one got the best conversion?

## Tracking results

- The power of online advertising is the ability to accurately track results
- Don't bother advertising if you're not going to spend time measuring
- Use Facebook & Google Analytics to track results
  - Home > Ads & Pages > Insights
  - <http://google.com/analytics>

## In summary

- Facebook advertising can be
  - Highly targeted
  - Inexpensive
  - Easy to setup and use
- Don't forget to "evolve" your ads
- Measure your results

Thank you!

greatBIGnews.com  
moderearth.net



Presentation available at <http://moderearth.net/learn2012>



## LIFELONG LEARNING 2012

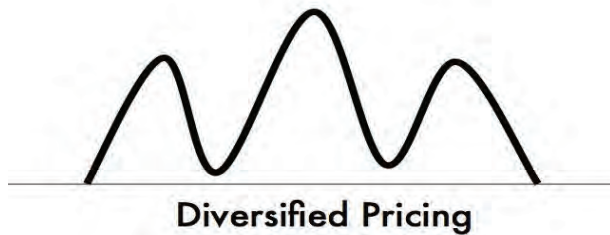
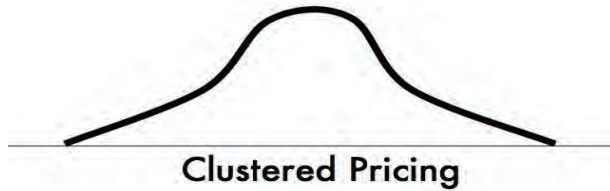
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# Pricing to Improve Profit Margins

Fred Bayley  
Consultant  
LERN  
Forest City, NC

### 1. Clustered vs. Diversified Pricing



Diversified is better because you can

- Reach other market segments
- Provide alternatives for your current customers

### 2. Impact of Pricing on Attendance



Pricing in four stages

Stage	Price	Attendance	Income
1	Up	Up	Up
2	Up	Same	Up
3	Up	Down	Up
4	Up	Down	Down

### 3. Price Breaks

A “price break” is the point at which a significant number of people say the price is too high.

<b>Price Breaks for Community Programs</b>			
\$10	\$20	\$25	\$30
\$40	\$50	\$60	\$75
\$80	\$100	\$150	\$200
\$300	\$400	\$500	\$1,000

<b>Price Breaks for CPE, Seminars, etc.</b>			
\$50	\$100	\$150	\$200
\$250	\$300	\$400	\$500
\$600	\$700	\$800	\$900
\$1,000	\$1,250*	\$1,500	\$1,800*
\$2,000		Up by \$1,000 from here	* Minor price break

### 4. Market Price Advantages

- a. Always use a market price
- b. Each course is priced individually
- c. The cost of the course is considered
- d. Consider what the audience is used to paying
- e. Examine the competition
- f. Reflects your brand

### 5. Pricing Rules

- a. Stay close to a price break
- b. Use 5's and 9's
- c. Do not put decimals and zeros after the price
- d. Don't highlight or hide the price



## 6. Steps to Set a Market Price

- a. Determine the formula price.  
(Income ÷ projected attendance)
- b. Find the nearest price break.
- c. What is the competition charging?
- d. What are people willing to pay? What are the current customer payment trends?

### Course Pricing Example

An instructor costs \$400 for a course which is the total production cost. The production cost is 50% of your income. Based on the average registrations from other similar courses you project 40 registrations for this course. What are the price options?

1. Income = (Production cost ÷ Production %)	\$400 ÷ .50	\$800
Formula Price = (Income ÷ Projected registrations)	\$800 ÷ 40	\$20
2. Nearest price break	\$20	
3. Pricing options	\$19 or \$25	

## 7. Value Up Strategies

- a. Promote the qualities of your speakers.
- b. Have speakers call a few key registrants for issues, concerns and items they want covered.
- c. Offer and promote structured discussion and networking opportunities.
- d. Increase the quality and “knowness” of your speakers.
- e. Offer speakers that normally would not speak to groups like yours but that bring an important message/perspective.
- f. Include and promote valuable, practical materials usable after the program.
- g. Include follow-up consultation.
- h. Include pre-program study material.

## 8. Pricing Strategies

### Your Price vs. The Competition's Price

- Price **just under** the competition and stress your cheaper prices in promotion and in your marketing
- Price **higher** than your competition and stress the quality of your programming in your promotion and marketing
- Price at the **same level** as the competition, and rely on your program's other factors, such as time, content, location, and instructors, to differentiate your program from others

## 9. Increasing Prices

Price Increase	What to Do
0 - 14%	Do it unless go over a price break
15 - 24%	Test
25 - 49%	Add new features
50%+	Make it a new event

### How to Sell Your Price Increase

- a. When raising the price, raise only one digit of the price
- b. If you are attempting to substantially raise your prices, do one major price increase rather than constantly raising prices every year
- c. Do a better brochure
- d. Add refreshments or other little touches to your course
- e. Add an outside speaker
- f. Include more paper, such as booklets or handouts
- g. Make the course longer
- h. Add activities that will be perceived as having greater value than the cost to you

## 10. Lowering Prices

### When to Lower Prices

- a. To get off a price break
- b. To reach another type of audience
- c. If your expenses decline significantly



## LIFELONG LEARNING 2012

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# 10 Steps to Improved Profitability

Joe Miera  
University of New Mexico  
Albuquerque, NM

Continuing Education  
at UNM

## 10 Steps to Program Profitability

Co-authored by

*Rita Martinez-Purson, Ed.D., Dean*

*Joe Miera, M.P.A., Associate Dean, Operations*





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## Who We Are

Continuing Education  
at UNM



- Self supporting division, receives minimal tax based support
- Annual budget of over \$11.2 Million
- More than 24,000 students served annually through non-credit programs, special projects and state contracts
- Over 200,000 community members and UNM employees use Conference Center facility annually
- Continuing Education at UNM employs approximately 75 staff and 400 instructors




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## FAM Project

Continuing Education  
at UNM

Presentation based on a collaborative model

- Financial Accountability Management Model
- LERN 2007 Award Winner
- Based on six years of financial data
- Melds together a combination of management best practices, each listed as a step






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## Step 1- Organize

### Organize for Profitability

- Program Group – Revenue Generating Centers
- Operations Group – Support Program Revenue Centers



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## Step 1- Organize

### Organize for Profitability

- Organization Achieves Two Objectives:
  - Distinguishes between Instructional Programs (revenue centers) and Program Support (cost centers)
  - Creates budget responsibility, authority and accountability by program managers and operations managers
- Exhibit 0

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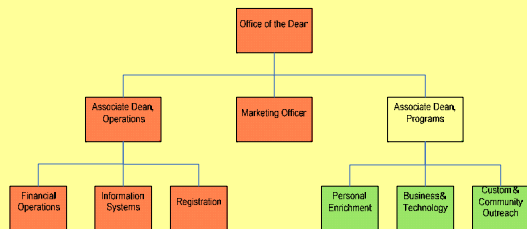
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## Step 1- Organize



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Step 2 – MIS Systems Continuing Education  at UNM



*Commit to MIS Systems that Support Efficiency & Accuracy*



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Step 2 – MIS Systems Continuing Education  at UNM

*Commit to MIS Systems that Support Efficiency & Accuracy*

- Use of a web based registration system
- Use of a detailed general ledger reporting system beyond that which your institution provides
- May require the use of a customized report writer



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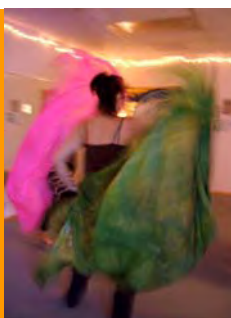

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Step 3 – Costs

Continuing Education  at UNM

*Consider Standardized Percentages for all program costs.*



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**Step 3 – Costs** Continuing Education  at UNM

**Consider standardized LERN ideal percentages for all programs.**

- Income – 100%
  - Production – 45% to 50%
  - Promotion – 10% to 15%
- Total Direct Costs – 60%
- Operating Margin – 40%
  - Administration - 35%
- Net Income – 5%

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**Step 3 – Costs** Continuing Education  at UNM

**UNM Continuing Education percentages for all programs.**

- Income – 100%
  - Production – 45%
  - Promotion – 10%
- Total Direct Costs – 55%
- Operating Margin – 45%
  - Program Administration – 20%
  - CE Administration - 20%
- Net Income – 5%

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**Step 4 - Programs** Continuing Education  at UNM

**Build Strong Programs along two dimensions:**

- Programmatic
- Financial



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## Step 4 - Programs

Continuing Education  at UNM

### Build Strong Programs along two dimensions

#### • Programmatic

#### • Financial

- Develop for pricing & market acceptance
- Use course-by-course budgeting utilizing LERN formulas
- Most basic building block is the course budget
- Exhibit 1 – Course by Course Budget Spreadsheet



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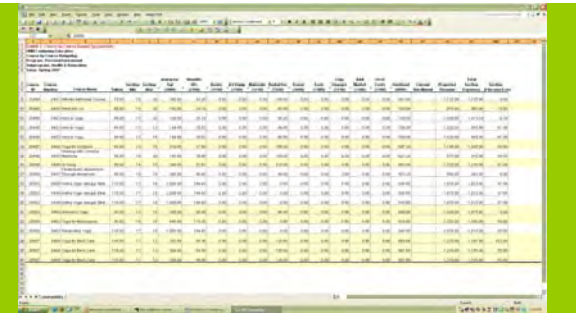
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## Step 4 - Programs

Continuing Education  at UNM



Course ID	Course Title	Credits	Base Price	Material Budget	Faculty Fee	Room	Other	Total Budget	Net Price	Net Revenue	Net Profit
10000	10000-001	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-002	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-003	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-004	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-005	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-006	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-007	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-008	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-009	3	1000	500	100	100	100	1700	1000	3000	1300
10000	10000-010	3	1000	500	100	100	100	1700	1000	3000	1300



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## Step 5 - Budgets

Continuing Education  at UNM



### Build Realistic Budgets



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## Step 5 - Budgets

Continuing Education at UNM

### Build Realistic Budgets

- Be Strategic in Budget Planning
  - Always start with current year results
  - Do SWOT Analysis, Environmental Scans, Scenario Building
  - Incremental Increase/Decrease means less risk & less conflict
  - Overall program numbers should be supported by the course-by-course detailed program numbers
  - Coordinate with and use your marketing plan
  - Build the "stars" and eliminate the "dogs"



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## Step 6 - Accountability

Continuing Education at UNM

### Structure Programs and Finances for Financial Accountability



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## Step 6 - Accountability

Continuing Education at UNM

### Structure Programs and Finances for Financial Accountability

- Align Finances with Reporting and Product Lines
  - Overall organization by program type – Personal Enrichment
  - Secondary organization by specific program within program type – Youth Programs, Story of New Mexico, Osher Institute
  - Goal is to create **financial accountability** by program supervisor, program manager and senior program manager
  - Exhibit 2 – Reporting Tree Example



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## Step 6 - Accountability

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A screenshot of a spreadsheet application showing a detailed financial report with multiple columns and rows of data. The spreadsheet is centered on a red background.



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## Step 7 – Decision Making

Continuing Education  
at UNM

*Structure Financial Reports  
to Support Decision Making  
Needs By Product Lines*



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## Step 7 – Decision Making

Continuing Education  
at UNM

*Structure Financial Reports to Support Decision Making Needs By Product Lines*

- Should reflect your commitment to standard LERN ideal Percentages
  - Institutional reporting will require customization
  - Individual program reports critical to measure program standardized LERN ideal percentages and contribution margin.
  - Exhibit 3 - FRx Report Example
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## Step 8 - FAM

### Implement FAM – Financial Accountability Model

- Feedback loop for monitoring program financial health
- Monthly “Stand and Deliver” presentations
- Promote an open non-threatening environment for discussion
- Program Managers are required to submit a monthly narrative in a specific format in order to structure the discussion
- Exhibit 4 – FAM Narrative Report

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## Step 8 - FAM

FAM Report for Program: Digital and Reporting Period: April 2016  
 Index Code: 687002 Submission By: Candace Crowe  
 Date: 10/28/16

Budget Type/Line	Account	No. of Projects	Line Item	Source Allocation	Actual
Total Expense	246,813	1,036	213,283	93,105	
Total Expense	246,813	1,036	282,378	105,963	
Faculty Expense & Benefits (FTE)	84,981	394	85,000	13,896	
Faculty Expense & Benefits (FTE)	84,981	394	14,444	1,551	
Total	84,981	394	99,444	15,447	

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## Step 8 - FAM

**Narrative**

**Effectiveness in meeting objectives:**

- Meeting of the Digital Literacy Committee proved successful
- Developing a revised version of what is going on in the classroom
- Collaborating with various units and other units regarding Digital Literacy program
- Update and ongoing committee activities
- Demonstrating the importance of the committee with other stakeholders in addition to work in ongoing activities
- One of the reports is particularly helpful as it provides additional insight into Digital Literacy

**Effectiveness in meeting objectives:**

- CPEI will be holding its regular meetings through the first of year
- Member activities and self-education
- Member activities and self-education in order to meet
- Member activities
- Help the staff with their activities and provide support
- Help and support distribution of existing materials, including functions

**Key findings:**

- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy

**Challenges:**

- Funding issues
- Staff activities and participation are being increasing and complex
- Other staff
- Funding issues
- Funding issues
- Funding issues
- Funding issues
- Funding issues
- Funding issues
- Funding issues
- Funding issues

**Next Steps:**

- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
- Digital Literacy
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- Digital Literacy
- Digital Literacy

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Step 9 – Quality Continuing Education  at UNM

Focus on Quality Execution of Programs



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Step 9 – Quality Continuing Education  at UNM

Focus on Quality Execution of Programs

- Operations Staff
  - Registration experience
  - Physical classroom experience
- Program Staff
  - Quality of instructor and course content
  - Meeting broader student expectations

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Step 10 - Evaluate Continuing Education  at UNM

Evaluate Programs and Finances



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## Step 10 - Evaluate

### Evaluate Programs and Finances

- Student Evaluations/Feedback Forms
- Variance Analysis – Prior Year to Current Year
- Key Formulas – Contribution Margin
- Multiyear Longitudinal Review
  - Examples




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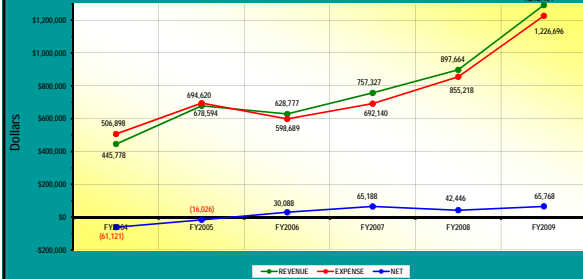
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## Step 10 - Evaluate

Total Professional Development - Financial Trends  
FY2004 to FY2009




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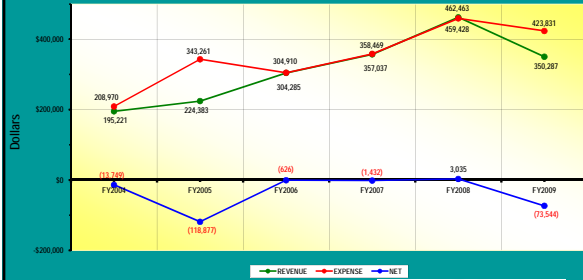
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## Step 10 - Evaluate

IT Digital Arts - Financial Trends  
FY2004 to FY2009




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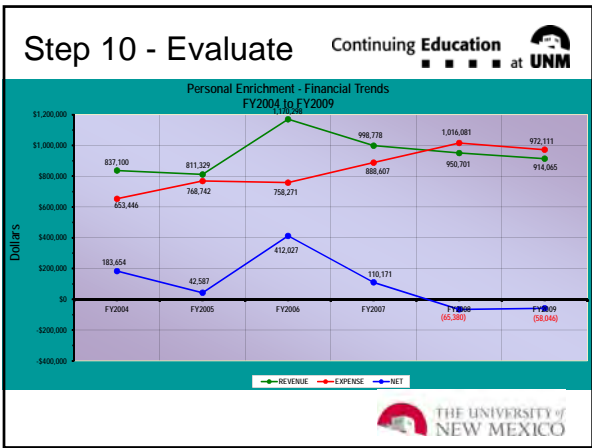
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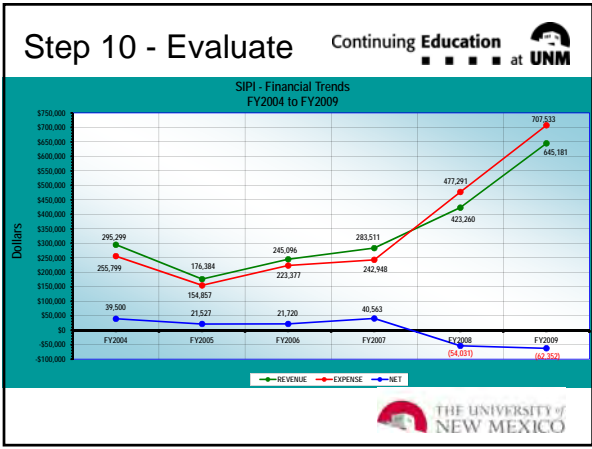
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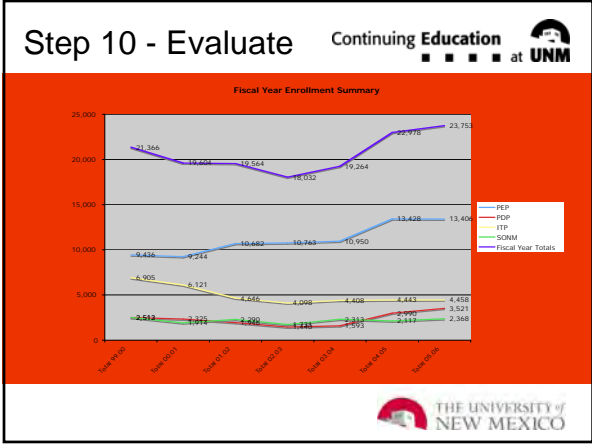
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## Bonus Step

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*Celebrate Success!!*



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## Contact Info

Continuing Education  at UNM



### Joe Miera

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Continuing Education at UNM  
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f. 505.277.6080  
e. [jmiera@unm.edu](mailto:jmiera@unm.edu)

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## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### 30 Best Operations

Greg Marsello  
Vice President  
LERN  
Tiverton, RI

# 30 Best Operations Strategies

Washington, D.C. Conference 2012  
Greg Marsello




## As Operations Goes, So Goes...

## 4 Goals of Operations

- \* Allow revenue generators to generate revenue
- \* Provide simplicity and consistency
- \* Make access and information easy for everyone
- \* Promote the organization's brand

## 30 Best Operations Strategies

- \* Centralize Operations
- \* Communication
- \* Proper Training
- \* Online Registration
- \* Centralize Documents
- \* Staff Meetings
- \* Streamline Processes
- \* Procedure Manual
- \* Information Specialist
- \* Instructors
- \* FAQs
- \* Data Collection
- \* Recordkeeping
- \* Preparation
- \* Reporting
- \* Software Management

## 30 Best Operations Strategies

- \* Promotion Tracking
- \* Staff Recognition
- \* Sunset Rule
- \* Reengineering
- \* Sell! Sell! Sell!
- \* Contracting
- \* Data Loading
- \* One Contact
- \* Advising
- \* Pull, Don't Push
- \* Build Relationships
- \* Be Reliable
- \* Be the Answer
- \* Make It Fun

## APPLE Principle

- \* **A**nticipate
- \* **P**repare
- \* **P**revent
- \* **L**earn
- \* **E**xcel





## LIFELONG LEARNING 2012

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### Building New Courses

Fred Bayley  
Consultant  
LERN  
Forest City, NC

## Basics

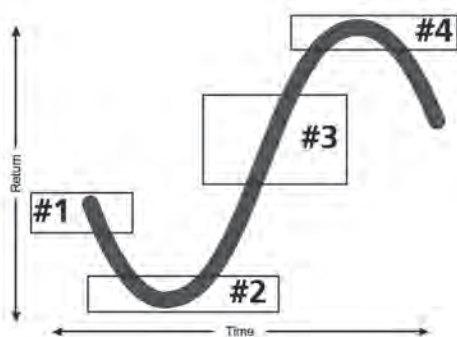
### 1. 10 Right Questions of Success

1. Is this the right audience?
2. Is this the right subject area?
3. Is this the right topic?
4. Is this the right title?
5. Is this the right format?
6. Is this the right place?
7. Is this the right time?
8. Is this the right instructor?
9. Is this the right price?
10. Is this the right promotion?

### 2. Ideal Programming Percentages



### 3. "S" Curve of Program Development



### 4. Most Profitable Courses

20% of your offerings generate 80% of your income.

Build on these.

- Offer it more often
- Offer another section
- Offer it in another location
- Create spin-off courses

## Creating New From Successful

### 1. Update Tired Courses

- Title it for a specific market
- Create modules
- Combine with another course
- Make it longer
- Make it shorter
- Make it current
- Give it a new angle
- Create an advanced level

### 2. Format Variations

#### Alternative Formats

- Class
- Activity
- Trip or tour
- Event
- Contract
- Seminar
- Conference
- Online
- Self-study
- Certificate
- Institute
- Hybrid

#### Formats for Community Programs

- One night
- Friday or Saturday night
- Camps
- Gentle Saturday: morning workshops, music & lunch, afternoon workshops
- One-day trips

#### Formats for business programs

- 4 day institutes
- Immersion: 14 hour weekend
- Webinars & Webcasts
- Online courses
- On-site customized

### 3. Subject Matter Variations

#### Laser In



## Progressions

Levels and spin-offs of courses

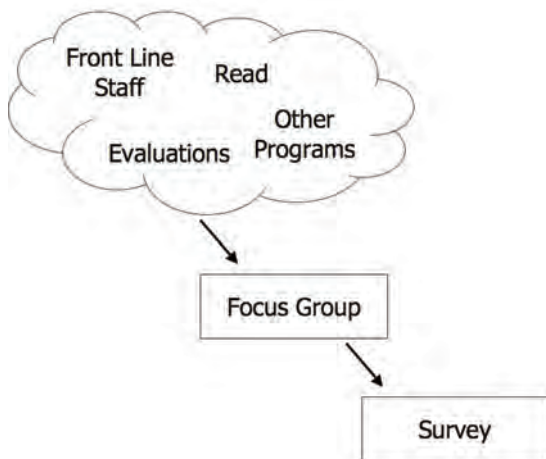
## Niche Strategy

	Tall People	Short People	Skinny People	Large People	Bald People	Hairy People	Fast People
Seminars							
Conferences							
Weekend Courses							
On-line							
Travel							
Weekday Courses							
Boring Courses							

## Image Strategy

What is your USP? Use this strength for new courses.

## Survey Customers for Ideas



## Your Ideas

- Use your normal idea gathering methods

## Focus Groups

- Brainstorm ideas and choose options
- 10-12 members who are customers
- Reduce ideas to 3-5

## Survey

Dear Learning Opportunities participant,  
 This fall, we will be increasing the number of computer courses in our catalog. Please select 2 courses you'd like to see us offer:

Creative Computing     Computer Basics     Internet Basics  
 Build Your Own PC     Savvy Computer Buying     Advanced Internet

Label Position


Thank you!  
 Please return this prepaid postcard by December 1, 2020.



**Business Reply Mail**

Learning Opportunities  
 1234 That Way  
 Anytown, USA 12345-678

No Postage  
 Necessary if  
 Mailed In  
 United States



## 4. Price

### Premier program

- Start with the price
- 3 times your normal fee

## Finances

### New Program Guidelines

Lifespan of at least 3 years?

Generate \$100,000 or more in income?

### Performance

Generate an acceptable operating margin by year 3

- Cover direct costs in year 1
- Cover direct costs and administrative costs in year 2
- Make money in year 3

	Year 1	Year 2	Year 3
Income	100%	100%	100%
Promotion			10-15%
Production			45-50%
Direct Costs	100%		60%
Operating Margin	0%		40%
Admin Costs			35%
Net		0%	5%





## LIFELONG LEARNING 2012

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### Creating Hybrid Courses

Kassia Dellabough  
Consultant  
LERN  
Eugene, OR



## Creating Hybrid Courses



**2012 Annual Conference**  
 Kassia Dellabough, PhD  
 LERN Senior Consultant  
 dellabough@lern.org

## Terminology

- Blended, Hybrid, Flipped
- Open Source
- Cloud
- Mobil Apps

## Trends

- Online education enrollment as a 21% growth rate compared to the paltry 2% growth rate in overall higher education
- Podcasting on the rise
- Digital content replacing books
- Social media becoming educational
- On-line degrees gaining credibility
- FREE Education: Coursera adds 17 new schools



From edudemic.com

## Online and Hybrid are Hot

- They will grow even more in the future because of generational demand and...
- Gas prices, time schedule flexibility, and time demands are big motivators.
- Long term, online and hybrid courses give you a much bigger market potential.
- Long term, online and hybrid courses will challenge the effectiveness of the traditional classroom

## What is a Hybrid Class?

- Hybrid classes or “blended learning” combines the best of face-to-face & on-line teaching/ learning environments.


+


= 21<sup>st</sup> Century Learner

## Teaching & Learning Trends

"Hybrid instruction is the single greatest unrecognized trend in higher education today." — *Graham Spanier, President of Penn State University*

'Hybrid' courses show promise  
 One educator demonstrates that blending face-to-face and online instruction can lead to better student grades and understanding -  
 - *Meris Stansbury, Assistant Editor, eSchool News*











**UC Berkley**  
**CUNY**  
**Stanford**  
**Harvard**  
**MIT etc. etc.!**




## Cell phone or Computer?




## How Do We Learn?


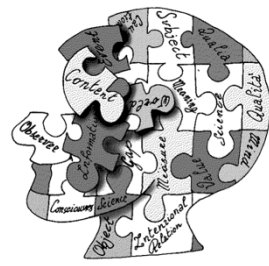




### What's Your Learning Style?

 <p><b>Visual</b></p> <p>Visual learners easily retain new information when they can see it. Using the graphics displays when they are trying to learn. Visual learners should only rely visual aids when possible. That way, anytime they are something that will go on a visual screen.</p>	 <p><b>Auditory</b></p> <p>Auditory learners will retain new information when they hear something. For auditory learners, the best way to learn is to listen...over and over. For a top-notch auditory learner, there is a third step you should take.</p>	 <p><b>Tactile</b></p> <p>Tactile learners will retain new information when they can see the "hands" approach...like this and demonstration.</p>
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## Communicating Information

## Traditional Technology






## TODAY'S TECHNOLOGY



## Innovations in Communication

Change the Way We Transfer Information










- Ball Point Pen 1945
- Telegraph 1828
- Radio - 1866
- Television - 1930's
- Airplanes - 1903
- Telephone 1870's




## Evolution of Digital Communication





1980    1990    1995    2000    2002    2004    2006    2008    2010

<ul style="list-style-type: none"> <li>•Fax</li> <li>•Modem</li> <li>•Answering Machine</li> <li>•Newsletter</li> <li>•BBS</li> <li>•Pagers</li> </ul>	<ul style="list-style-type: none"> <li>•Web</li> <li>•Email</li> <li>•PowerPoint</li> <li>•Voice Mail</li> <li>•Cell Phone</li> <li>•Instant Messenger</li> <li>•Contact Managers</li> </ul>	<ul style="list-style-type: none"> <li>•VOIP</li> <li>•Wikki / Forums</li> <li>•Survey Monkey</li> <li>•Zoomerang</li> <li>•E-Commerce</li> <li>•Newsletters</li> <li>•Amazon</li> <li>•Blackberry</li> <li>•PDA</li> <li>•RSS Feeds</li> <li>•Blogs</li> <li>•Ebay</li> <li>•Google</li> <li>•Paypal</li> </ul>	<ul style="list-style-type: none"> <li>•Podcasts</li> <li>•YouTube</li> <li>•MySpace</li> <li>•Web Support</li> <li>•Craigslist</li> <li>•Skype</li> <li>•Digital Signage</li> <li>•Videophone</li> <li>•Tele-commuting</li> </ul>
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## WIKIPEDIA

English  
*The Free Encyclopedia*  
2 715 000+ articles

日本語  
フリー百科事典  
557 000+ 記事

Deutsch  
*Die freie Enzyklopädie*  
857 000+ Artikel

Español  
*La enciclopedia libre*  
439 000+ artículos


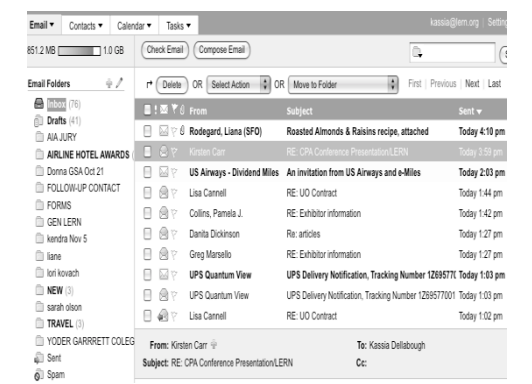
Polski  
*Wolna encyklopedia*  
572 000+ hasła

Português  
*A enciclopédia livre*  
454 000+ artigos

Italiano  
*L'enciclopedia libera*  
535 000+ voci

Russкий  
*Свободная энциклопедия*  
353 000+ статей

Nederlands  
*De vrije encyclopedie*  
514 000+ artikelen

851.2 MB / 1.0 GB

From: Kirsten Carr  
Subject: RE: CPA Conference PresentationLERN

To: Kassia Delisbough  
Cc:

## MYSPACE.COM

Hello, **kassial!**

My URL: [myspace.com/kassial](http://myspace.com/kassial) [Edit Profile]

Upload a photo to that your friends can recognize you!

Profile Views: 85  
Last Login: 03/28/09

Photos: 808 | Upload  
Videos: 808 | Upload  
Manage Blog

Create and manage your playlists on MySpace Music.

Add schools that you've attended to find current classmates or keep in touch with old ones.

maybe later

Status and Mood

Status: (none) | Update

Mood: (none) | Update

What are you doing right now? Click the link above to tell your friends.

Tom happy new year, to you and yours 1-3 00 January 1, 2009

Mood: optimistic

Alerts

New Friend Requests!

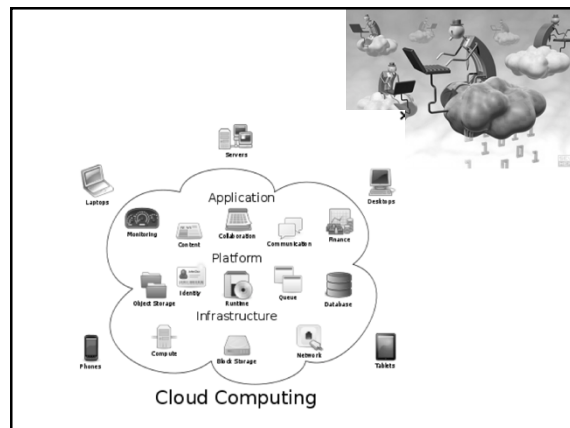
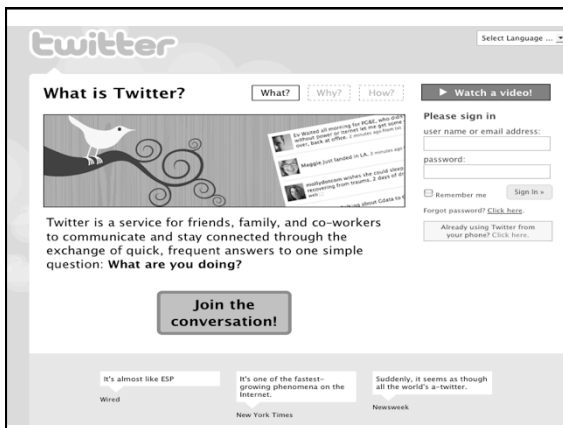
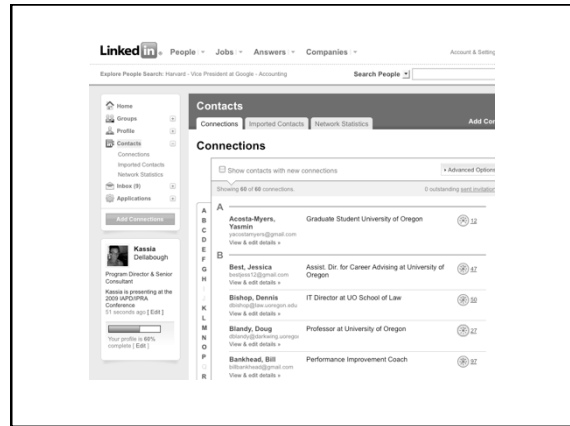
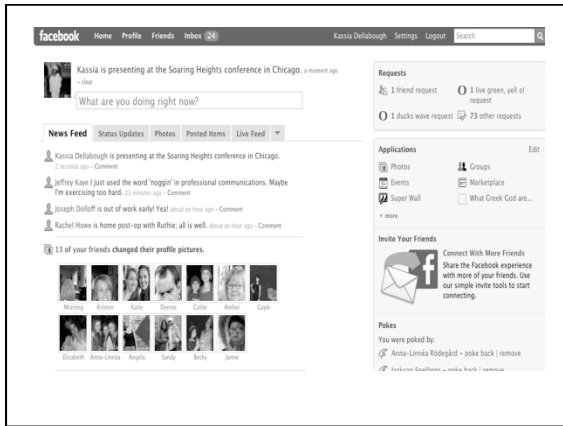
My Apps

Apps are free add-ons for your MySpace. Find them in the [App Gallery](#)

Friend Updates


Now you and your friends can be updated when you:

- Enter a Contact
- Add New Friends
- Post Events
- Are Attending Events
- Use MySpace Mobile
- Create a Classified Ad




### Best Aspects of Face-to-face

- Create a sense of learning community
- Demonstrate and test hands-on skills
- Field questions/problems efficiently
- Most older faculty & students more comfortable
- Potential dynamic exchange
- Ability to “read” body language



### Best Aspects of On-line

- Flexibility for students with busy schedules
- Serves students at a distance
- Opportunity for all students to participate equally – potential to self-pace
- Documents and archives dialogue
- Facilitates breakout group meetings
- Immediate access to information on a global level



## Drawbacks of Face-to-face

- Extroverted students participate most
- No documentation of discussions
- Requires students to attend in specific location at specific time
- Limited technology/media access
- Space limits size of class & interaction
- Students must pace with the median learner

## Drawbacks of on-line

- Student and faculty access and ability to use technology effectively
- Communicating the course structure & requirements clearly – potential confusion
- Still heavily based on written documentation
- Selecting the best courseware/cost
- Keeping current with technology advances
- Access to tech support

## Building a New Hybrid Curriculum

- Review current curriculum and evaluate components;
  - Need face-to-face feedback/review/testing?
  - Is the audience geographically distant?
  - Potential for asynchronous discussion threads?
  - What media can deliver the information better?
  - Can collaboration be facilitated on-line
  - How can the curriculum be enhanced with students dispersed geographically?
  - How can technology enhance/improve content?

## Basic Preparation

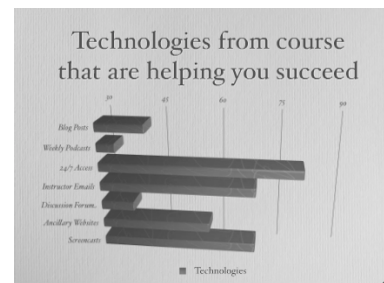
- ADA compliance
- Clear course overview & introduction
- Faculty & assistants bio/contact info
- Learning objectives – course units
- Assessment process & learner interaction expectations
- Resources 24/7
- Calendar of deadlines
- Course technology support 24/7

## Process

- Encourage contact between students and faculty
- Design interactive processes among students
- Faculty must manage time efficiently
- Give prompt feedback
- Create systematic prompts

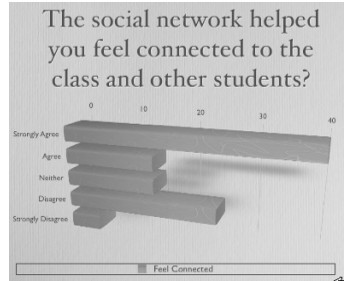


## Technology



From <http://www.slideshare.net/soul4real/building-community-in-onlinehybrid-courses-through-web-20-tools>

## Social Networking: Creating Connection/ Learning Community



<http://www.slideshare.net/soul4real/building-community-in-onlinehybrid-courses-through-web-20-tools>

## Key Strategies for Success



- Clear communication process
- Utilize the best of both formats
- Develop curriculum by units
- Keep faculty updated & supported
- Tap students knowledge and experience
- Avoid “bells & whistles” if they serve no clear purpose

## What Are Courseware Options?

- LERN’s own YouGotClass – *simple & affordable!*
- Blackboard (WebCT), Ed2Go -
- Web 2.0 – wikis, blogs, etc.
- Custom Blogs/Wordpress etc.
- Open Source Options



## Resources from LERN



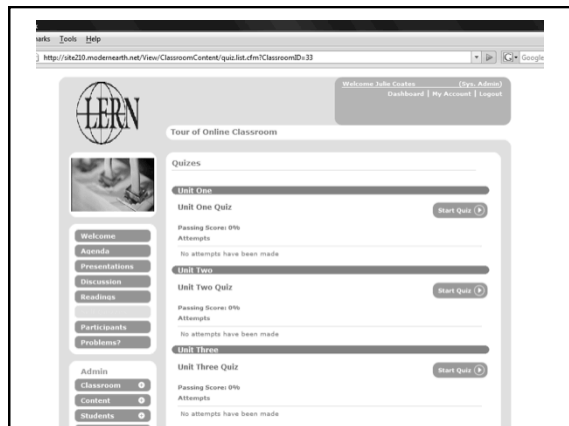
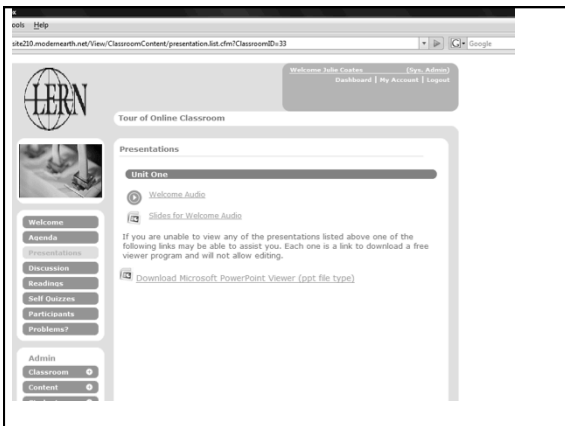
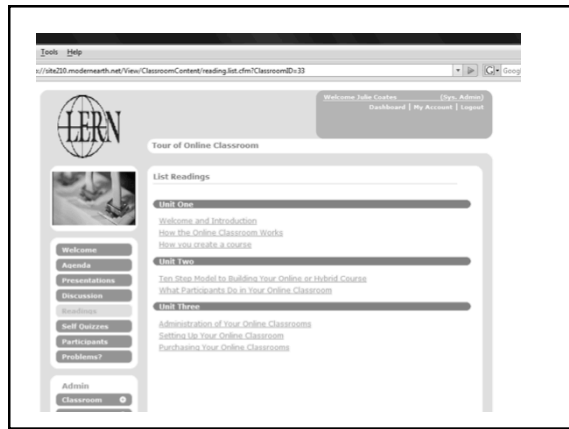
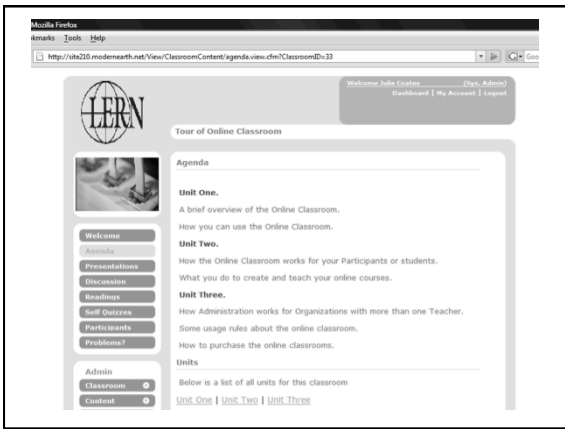
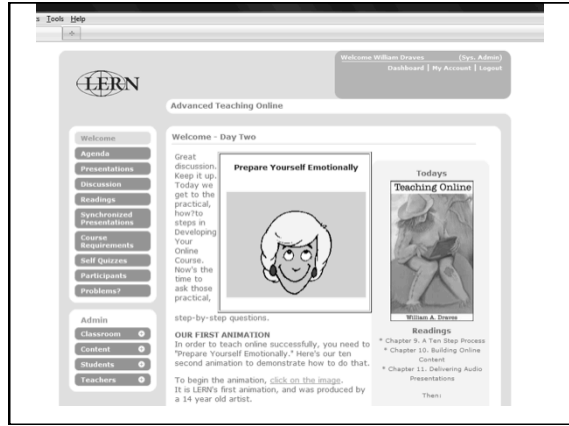
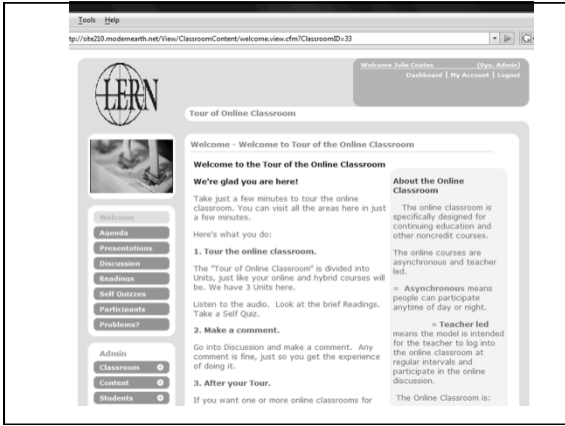
## YouGotClassroom

If you want online classrooms  
for your program contact us  
in the trade show  
YouGotClassroom Exhibit

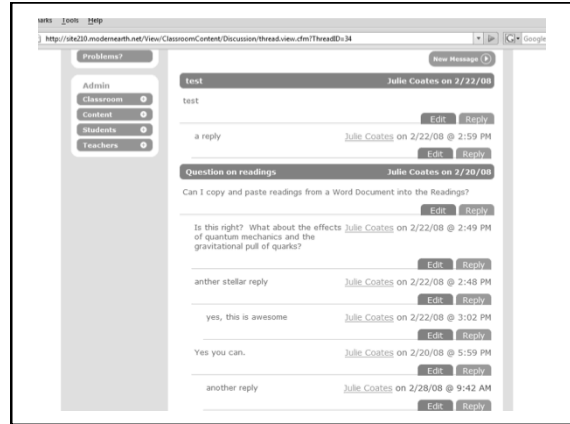
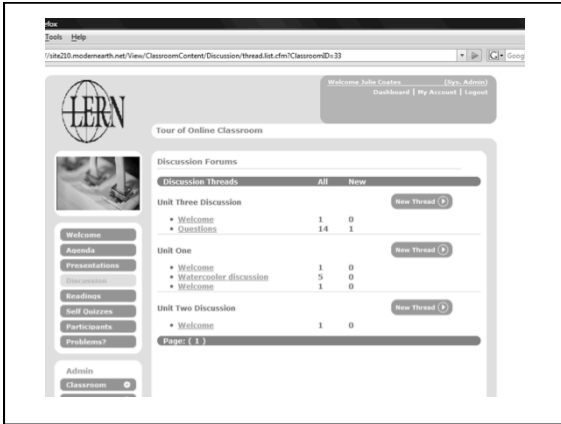
## Basics of On-line Course sites

Your students (and teachers) will start at a web page and log in with a username and password. Need to address Privacy Issues!









### Who is Your Audience?

- Busy professionals, yes Boomers
- Generation X or Generation Y – any setting
- Geographically dispersed

### Do Faculty Have Support/Resources?

- Faculty need
  - Peers who are already teaching on-line as mentors
  - On-going support to learn best practices for on-line teaching & access to technology
  - Training & updates with evolving technology
  - Incentives to move curriculum on-line

### Testing & Evaluation

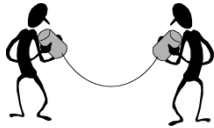
- Regardless of venue, tests can be created and graded on-line saving instructor's time.
- Videos can be used to demonstrate skills and techniques – both as a teaching tool and evaluation.

### Accountability?

- If a student is going to cheat – they can equally cheat in both formats
- Digital files are easier to trace for copyright issues and plagiarism

## Questions?

Contact LERN  
dellabough@lern.org



## Resources: BOOKS

- Teaching On-line - Bill Draves
- Introduction to Hybrid Courses  
by Carla Garnham and Robert Kaleta, UW-Milwaukee
- Approximately "Real World" Learning with the Hybrid Model by Rachel Spilka, University of Wisconsin-Milwaukee

## Resources: BOOKS

- Reflections on Teaching a Large Enrollment Course Using a Hybrid Format  
by John (Jack) Johnson, University of Wisconsin-Milwaukee
- Inside Outside, Upside Downside: Strategies for Connecting Online and Face-to-Face Instruction in Hybrid Courses  
by Peter Sands, UW-Milwaukee

## Resources: web links

- LERN <http://www.teachingonthenet.org/>
- "Hybrid Teaching Seeks to End the Divide Between Traditional and Online instruction."  
<http://chronicle.com/free/v48/i28/28a03301.htm>
- Hybrid Online Courses & Strategies for Collaboration  
<http://www.mala.bc.ca/~soules/hybrid.htm>
- [http://www.tltgroup.org/flashlight/Handbook/hybrid\\_courses.htm](http://www.tltgroup.org/flashlight/Handbook/hybrid_courses.htm)
- UW System Hybrid Course Project [www.uwex.edu/disted/conference/Resource\\_library/.../01\\_41.pdf](http://www.uwex.edu/disted/conference/Resource_library/.../01_41.pdf)

## OTHER Resources

- TED – "Ideas Worth Spreading" [Ted.com](http://ted.com)
- Second Life Virtual World – [Secondlife.com](http://secondlife.com)
- Eric Educational Resource Information Center  
<http://eric.ed.gov>
- Apple iTunesU <http://www.apple.com/education/mobile-learning/>



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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# Education in the 21st Century for 2013

William Draves  
President  
LERN  
River Falls, WI

Julie Coates  
Vice President  
LERN  
River Falls, WI



## Education in the 21<sup>st</sup> Century

*With Julie Coates and William A. Draves, authors of *The Pedagogy of the 21st Century**

### Predictions for 2030

1. The way most teachers grade today will be declared illegal. Grading based on behavior, including penalizing students for lack of attendance, handing in homework late, and not doing course assignments, will be illegal.
2. A significant part of education funding will come from a tax on marijuana sales and usage.
3. Boys will again be 50% of college entrants and graduates.
4. The United States, joining other post-industrial nations, will declare that 50% or more of its children should have four-year college degrees, thus doubling the number of students in college over the number in 2010.
5. Technology budgets will be larger than building or capital improvement budgets.
6. Almost all teachers will not be allowed to grade students. Grading will be done by specialists, who will administer and evaluate tests.
7. The Carnegie Unit and Student Hour will be replaced by an outcomes-based learning measurement.
8. Students will take tests, on average, once or twice a week, almost always online.
9. The A, B, C, D, F system of grading will be replaced by pass-fail tests, with 80% being the pass rate.
10. Students in elementary, secondary and higher education will be allowed to choose from around 10,000 subjects to study.
11. Schools and colleges will have classes 18 hours a day.
12. Students will not attend school or college continually from morning to mid-afternoon, but instead study at home, school and in the community, often on the same day.
13. Elementary and secondary students will travel up to 100 miles each way to school each day, taking trains.

14. While 55% of students took school buses to schools in 2009, only about 20% or fewer will take school buses by 2030. Some 80% of students will walk and/or take light rail or trains.
15. Community colleges and public university systems will consolidate a number of operations and use a multi-campus approach where students travel by train between campuses.
16. Most schools will offer online courses as part of elementary and secondary education.
17. Every face-to-face course in elementary, secondary and post-secondary education will be hybrid.
18. Testing, which will occur at least weekly for each student, will be done by objective independent sources trained and skilled in testing and assessment.
19. The physical classroom with a blackboard, teacher in front, and rows of desks will all be gone from most schools and colleges, replaced by one or more versions of a “learning commons.”
20. Governments, schools and colleges all endorse a policy that personalizes learning and instruction, abandoning the factory model of education.
21. Faculty and administrators will cease treating, and saying that they treat, students the “same,” and treat, and say they treat, each student “differently.”



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### Marketing Youth Programs

Heather Dimitt  
LERN  
Columbia, MO



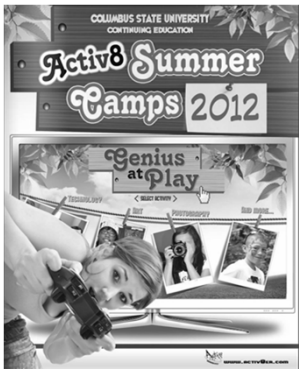
**MARKETING  
YOUTH PROGRAMS**

**Heather Dimitt**  
 Director of Membership Services  
 heather@lern.org  
[www.linkedin.com/in/heatherdimitt](http://www.linkedin.com/in/heatherdimitt)  
[www.facebook.com/heatheratlern](http://www.facebook.com/heatheratlern)  
[www.twitter.com/msheatherd](http://www.twitter.com/msheatherd)

**LERN**


**Marketing Best Practice:  
Multi-Modal Marketing**

- A. Print Brochures
- B. Emails
- C. Websites
- D. Other Promotional Activities
- E. Social Media
- F. Videos
- G. Mobile Marketing



**Print  
Brochures**

- ▣ The brochure is your image
- ▣ Brochures still generate the majority of enrollment
- ▣ Your brochure is an investment!!



**Covers**

- ▣ Promote fun & friendship
- ▣ Taglines focus on individuality
  - ▣ "Find you"
  - ▣ "You choose"
  - ▣ "Who will you be?"

**Great Inside Pages**

1. Take risks
2. Interesting graphic layouts
  - ▣ Use geometric shapes, angle layouts, etc.
  - ▣ Layers-text over pics, pics over pics, etc.
3. Intersperse real participant pictures, stock photos and animated characters
4. Lots & lots of color
5. Testimonials emphasizing fun & making friends

**Registration Form**

- ▣ Only collect the pertinent information
- ▣ Send parent permission slips, medical release forms, etc. out to parents after registration.

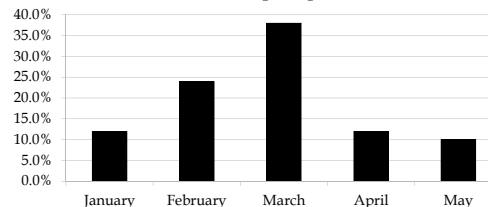
## Marketing timeline



Previously, LERN found the best time to mail your summer youth programs brochure is the first two weeks of February, January or March (in that order)

## For Programs Reporting Income Up

Month sent first print promotion



## Case Studies on Camps Suggest

- ☐ Distribute brochure through other youth serving organizations
  - Boy Scouts/Girl Scouts
  - Home School Associations
- ☐ Know the K-12 calendar
  - Parents make plans for summer during K-12 Spring Break
  - Do a second mailing of brochure to previous customers 2 weeks before K-12 is out for summer

## Email Marketing Works!!

- ☐ Used by 90% of programs reporting increased income
- ☐ Used by 75% of programs reporting same income
- ☐ 71% of programs reporting decreased income also used; however, less likely to use targeted lists.

## Text Emails

- ☐ Good for small lists – up to 200 names
- ☐ Get better results when they are coming from an actual person
- ☐ Cannot track open rates, click through rates
- ☐ Lack visual impression.

## HTML emails

- ☐ Usually get better response than text emails
- ☐ Better visual impression: graphic design, color pictures
- ☐ Can track open rates, click through rates
- ☐ Professional vendor can do the work



## Never Put Names In To: Or CC:

- ☐ If you are sending out email promotions, never put the names in either “To” or “CC”
  - Disrespects people’s privacy
  - Spammers can obtain the email addresses
- ☐ Always put names in BCC – if you are not using a third-party vendor

## Unsubscribe Notice

- ☐ Have an unsubscribe notice in every email
- ☐ Anytime you get an email address, it means you can send the person email
- ☐ BUT anytime a person doesn’t want email, you need to stop emailing that person



## Email Strategies

- ☐ Collect emails from parents who take your adult classes and want something similar for their kids
- ☐ Gather email addresses from current participants and parents
  - Invite them to join an “insiders’ list”; give updates as camps are developed
  - Give notification when camps are all developed prior to distribution of promotional materials.
  - Offer early opportunities to enroll

## Design Suggestions

- ☐ Fonts
  - Serif font for headlines
  - Sans serif font for the body copy
  - Maximum of three types of fonts
    - One for headings
    - One for the text.
    - If needed one for emphasis
- ☐ A welcome message is a waste of space
- ☐ External Links
  - Keep to a minimum
  - Open in a new window
- ☐ Bullets are great for web page copy

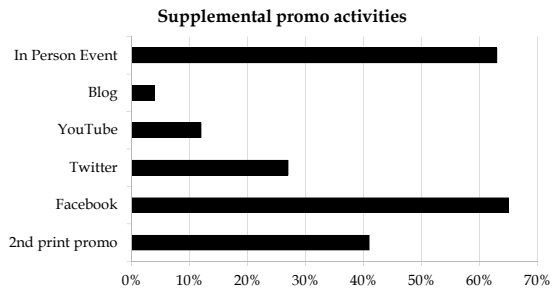
## Design Suggestions

- ☐ Images
  - Give images “breathing space”
  - Optimize the photos and other images on your web pages so your site loads quickly.
  - Photos only need 72 dpi (dots per inch) to look good on your web site.
  - Always use Alt tags
- ☐ Dark grey is the new black online.
- ☐ Never use Flash for your navigation. Your site will not be indexed in Google.
- ☐ Only underline links

## Big Tip: Use a Microsite

A specialized webpage to which a promotion directs you

## For Programs Reporting Income Up



## 39% Reported Other Activities

- ❑ Drop off brochures at public library
- ❑ Postcards
- ❑ Newspaper advertisements/articles
- ❑ Radio advertisements
- ❑ Posters/Flyers in schools and city facilities
- ❑ Movie theatre advertisements
- ❑ Parent magazine advertisements
- ❑ College marquee
- ❑ Digital billboards
- ❑ Gave teachers flyers to distribute
- ❑ TV advertisements

## Social Media

- ▶ Blogs, Twitter, LinkedIn, Facebook, Podcasting YouTube, Google+, etc.
  - ▶ Great place to load pictures and videos of participants and activities
  - ▶ Opportunity to engage in a conversation with current and potential customers
- ▶ Social bookmarks on website pages.

## 5 Social Media Strategies

1. Focus on one big idea
  - ❑ We're bombarded with messages all day. We remember creative messages focusing on one idea.
  - ❑ Next time you are tweeting or writing a status update, ask yourself: What's the major idea I want to communicate?

## 5 Social Media Strategies

2. Tell stories
  - ❑ Stories resonate and help us relate to others.
  - ❑ Use social media as a conduit to tell interesting, real-life stories.
  - ❑ Videos are a great way to tell stories.

## 5 Social Media Strategies

3. Use startling stats, numbered lists and acronyms
  - ❑ People tend to remember memorable facts or numbers rather than theories or abstract ideas.
  - ❑ We remember numbered lists better than a listing of facts. Number your points according to importance or relevance, your audience will at least remember the top few points.
  - ❑ Acronyms and abbreviations are also effective to help your audience members remember things they might not normally retain. Don't overuse.

## 5 Social Media Strategies

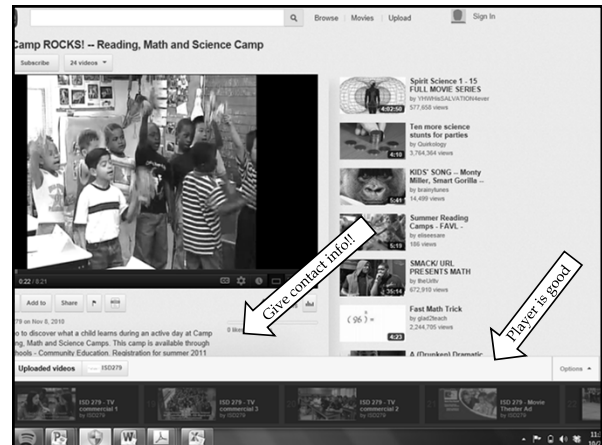
4. Invoke emotion to capture attention
  - ❑ Your message should make the audience feel something.
  - ❑ Don't fall back on the same old corporate speak. Touch on emotions like excitement, fear, happiness or sadness.
  - ❑ Focus on what the audience stands to lose as well as what they stand to gain.

## 5 Social Media Strategies

5. Tell the truth
  - ❑ The truth is ethical, it is also the practical approach to social media.
  - ❑ Hyperbole will adversely impact your online reputation once your followers pick up on it.
  - ❑ Social media is a perfect place to listen and ask questions of your followers so you can meet their needs

## The Best Marketing Videos

1. Provide an experience for consumers that text or print can't do
2. Capture the story behind the program
3. Present 3-4 ways your program stands out
4. Show action
5. Feature multiple speakers
6. Have high quality audio



## G. Mobile Marketing



## How Programs Use QR Codes

1. Easy access to your Facebook and Twitter pages.
2. Showcase a YouTube video from cooking classes or other type of demonstration.
3. Next to most popular classes in catalog to provide quick and easy access to registration.
4. Redirect people to your mobile optimized website.
5. Connect to a comprehensive instructor bio.
6. Access internal maps of your building.
7. Link to dated grid schedule of summer camps.



## LIFELONG LEARNING 2012

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### Needs Assessment

Rick Walsh  
Consultant  
LERN  
Virginia Beach, VA

## 1. Needs Assessment

“An ongoing process of discovering what your program’s participants want in terms of activities and services”



### Assessment Is NOT

- a. Expensive
- b. A one-time study
- c. More work — it replaces wasted staff time and its results maximize profits and services
- d. General overview — it is very specific
- e. The same as environmental scanning, though it can be used in environmental scanning
- f. Something you contract out; it is too important; it is something you and your staff do
- g. A process that separates ‘needs’ from ‘wants’

### Needs Assessment IS

- a. Customer oriented
- b. Low cost & ongoing
- c. A process for some or all of your staff in some way
- d. Using the participants knowledge about their needs
- e. Practical
- f. Less costly than not doing needs assessments

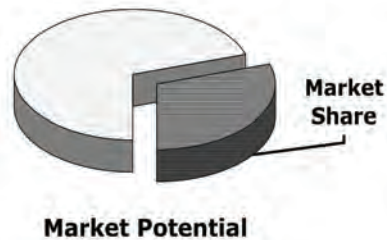
### Three Central Uses of Needs Assessments

- a. Determines which customers to serve
- b. Determines what courses to offer
- c. Determines how courses should be offered

## 2. Market Potential and Market Share

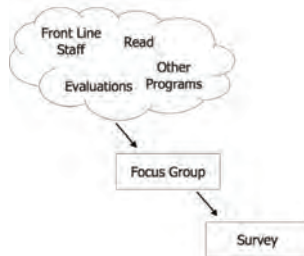
Market potential is the total number of possible participants.

Market share is the total number of people you have enrolled. It is expressed as a percentage: The number in your program divided by market potential.



## 3. Market Research

Part of a programmer's job. Be in touch with your participants. You need to be able to ask the right questions. Analyze the results.



## 4. Focus Groups

Brainstorm ideas and choose options using focus groups. Members should typically be customers because they make the decision to purchase from you.

### Tips

- You want to look for people who have ideas, support, and enthusiasm for your program.
- Don't try to have your focus group play too many roles.
- Do not rely too much on your focus group.

## 5. Surveys

- a. General Data Collection
- b. Evaluations
- c. Promotion Tracking
- d. Content Inquiries
- e. Single Issue Surveys

### Best Survey Techniques

Type	Give Out	Response Time
Post Mail	Class Beginning	Immediate
Email	Tue/Wed/Thur 10 - 12 noon	3 days
Snail mail	Any time	4 weeks
Web site	Any time	Update monthly

### Least Used Survey Technique

Phone

### Surveys Provide:

- a. Action decisions
- b. Quantifiable responses to specific questions

### Creating the Survey

Half the task of getting answers is knowing what questions to ask. What information are you looking for and how will you use it?

### Choosing Problems for Your Survey

4 steps to choose the problems to solve with a survey.

1. Analyze Program Data

*What's the problem? Where do you hurt?*

2. Analyze Participant Data

*Where do you stand right now?*

3. Develop Hypotheses or Theories

*Why does the problem exist? What's the reason for the problem?*

4. Rank Problems by Priority

*What's most important?*



## Increasing Response to Surveys

- a. Closed-ended questions get a better response than open-ended questions.
  - Close ended example:  
What is your favorite color?
    - a. blue
    - b. green
    - c. red
  - Open ended example:  
Why is there air?
- b. Best answer categories
  - Multiple choice
  - Agree/disagree

Likert Scale				
Poor		Okay		Excellent
1	2	3	4	5

- c. Always provide lines when asking for a response to an open-ended question. Allow one line for answers you anticipate will be one sentence or shorter.
- d. Collect customer data by having the label attached to the form.
- e. Most Surveys are now conducted on-line

## Sample Post Card Survey

Dear Learning Opportunities participant, This fall, we will be increasing the number of computer courses in our catalog. Please select 2 courses you'd like to see us offer:	
<input type="checkbox"/> Creative Computing	<input type="checkbox"/> Computer Basics
<input type="checkbox"/> Build Your Own PC	<input type="checkbox"/> Savvy Computer Buying
<input type="checkbox"/> Internet Basics	<input type="checkbox"/> Advanced Internet
<b>Label Position</b>	Thank you! Please return this prepaid postcard by December 1, 2020.
	
<b>Business Reply Mail</b>	
Learning Opportunities 1234 That Way Anytown, USA 12345-678	
No Postage Necessary if Mailed In United States 	



## E-mail Survey

Dear LERN Member,

Help us decide which new seminar LERN will bring to your area this spring.

This survey only takes 2 seconds. Just click here  
<http://www.lern.org>

Tell us which topics are of most interest to you. The LERN one-day seminars were a big hit last spring. More than 500 people attended the seminar in 20 cities. Now help us decide which new seminar LERN should offer for lifelong learning in spring 1955.

Thanks for your membership and support!

To unsubscribe from eLERN, your free monthly e-newsletter with your LERN membership, simply click here.

## 6. Low-Dollar vs. High-Dollar Needs Assessment

Low-dollar Courses are not cost effective to do many needs assessment. Follow these guidelines:

- a. Accept normal cancellation or failure rate, based on historical experience.
- b. Look at a larger group or division.
- c. Do quick surveys.
- d. Just do it.

Spend time doing research on high-dollar initiatives.



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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# Partnerships to Grow Your Program

Rob Watters  
American Society for Quality  
Milwaukee, WI

Dori Marty  
Wisconsin Indianhead Technical College  
New Richmond, WI

## Partnerships to Grow Your Program


  
 Dori Marty & Rob Watters

## Why Partnerships?

- ↳ A partnership is an alliance which benefits all parties involved.
  - Shared mission and vision
  - Partners vs. Competitors
- ↳ Pooling resources and collaboration.
  - Brand Recognition
  - Increase Audience/Market share
- ↳ They can be for a single event or ongoing based on the type of collaboration.
- ↳ Partnerships may be more than just about money.
  - Subject Matter/Content Expertise
  - Community Collaboration
- ↳ The work may or may not be shared equally between the partners.
- ↳ Partners are accountable to each other, sharing both successes and shortfalls.

## Types of Partnerships

- ↳ Consultant – Gathering input for community or institutional activities.
- ↳ Contributory – To do the actual work that will forward the shared goals of the partners.
- ↳ Operational – Sets the direction and methods for the launch and implementation of a production, program, or initiative. One or more partners may implement the plan.
- ↳ Collaborative – Forms to share experience, resources and decision making to forward the shared and agreed upon agenda of the partnership.

From Creating and Sustaining Partnerships – LERN

## Core Skills/Attributes

Core Skills/Attributes for Partnering				
Leadership/Advisory	Partnership Building	Functional/Technical	Organizational/Management	Communication
Business Acumen	Contracting	Promotional Operations	Time Management	Conflict Resolution
Financial	Program Evaluation	Graphic/Web	Project Management	Problem Solving
Policy Making	Planning	Media Management	Clerical	Influencing/Negotiating
Strategic Planning	Resource Acquisition	Technology Management	Outsource Management	Networking
Workforce Management	Measuring Collaboration	Program Operations	Volunteer Management	
Team-Building		Product Development	Recruitment	

## Building a Solid Foundation

### PARTNERSHIP AGREEMENTS

- ↳ Clear Definitions
- ↳ Terms and Responsibilities
- ↳ Copyright Infringement and Ownership
- ↳ Collection/Disbursements of Revenues/Royalties
- ↳ Finances/Expenses
- ↳ Books and Records
- ↳ Conduct/Confidentiality
- ↳ Warranties
- ↳ Trademark Usage
- ↳ Miscellaneous
  - Modifications
  - Disclaimers

## Building a Solid Foundation

### PARTNERSHIP CHECKLIST

- ↳ Financial Model
  - Registration Fee
  - Budget
  - Final Accounting
  - Payment Distribution
- ↳ Logistics/Site Selection
  - Venue
  - Registration
  - Cancellation
- ↳ Promotion
  - Marketing
  - Exhibits/Sponsors
- ↳ Production
  - Instructor
  - Materials
  - Audio/Visual
  - Food
  - Onsite Coordination

## Evaluation of the Partnership

- ☞ Did the partnership meet the goals set?
- ☞ Did the partnership positively impact the community?
- ☞ What benefits did each partner receive from the partnership?
- ☞ Was the partnership beneficial for completion of this project?
- ☞ What were the intangible benefits of the partnership?
- ☞ Could I do this event on my own?

From Creating and Sustaining Partnerships - LERN

## Evaluation of the Partnership

WISCONSIN DISABERED TECHNICAL COLLEGE SERVICES CONTRACT AGREEMENT	Keywords: Business Office
<p>This agreement is made between the Wisconsin Inland Technical College and                      Name: _____ Address: _____ City: _____ State: _____ Zip: _____                      as an independent service contractor to be commenced on the _____ day of _____, 20____, and terminating _____.</p>	
<p>Complete for individualized purposes only:                      Course No. and section: _____ Location No. _____                      For services rendered and defined as: _____                      or agreed that _____ will receive compensation of _____ Total Remuneration (Total Cost)</p>	
<p>beginning with the year starting in July and continuing to June. This may be adjusted contingent upon budget availability. Payment to be made by the State prior to the first day of the month of a statement for services rendered.</p>	
<p><b>Insurance Coverage:</b> The contracting agent shall be responsible for all necessary business coverage while engaged in activities governing the duties of the contract. The contractor shall be responsible for all necessary liability coverage while engaged in activities governing the duties of the contract. The contracting agent shall be responsible for all payments for tax and social security purposes.</p>	
<p>The agreement shall be in full force and effect on the _____ day of _____, 20____.</p>	
Director Representative	Independent Contractor
_____ President/Program	_____ Independent Contractor

SERVICES CONTRACT AGREEMENT
<p>Service contract agreements are to be completed by:</p> <ol style="list-style-type: none"> <li>All business or individuals who are working and responsible for an business or contract number.</li> <li>The individual identified as a contractor in the business or contract number and who is responsible for the contract. If the individual is not responsible for the contract, the individual identified as a contractor in the contract number of the individual is required.</li> <li>If communication is for instruction, the following course number and location must be completed:                             <ol style="list-style-type: none"> <li>Address</li> <li>Department area</li> <li>Course number</li> <li>Location number</li> <li>Course number</li> </ol> </li> <li>Remuneration to include the total cost of services provided by the contractor.</li> <li>Service contract agreement will be electronically filed by the Director representative for processing.</li> <li>Payment to service providers is through payroll after the completion of the service agreement.</li> <li>Payment for services rendered is to be made by completing a bill of materials and attaching a copy of the service contract agreement for registration.</li> <li>Copying of the agreement by (print, fill, sign, fax, or e-mail):                             <ol style="list-style-type: none"> <li>Printed/signed/initialled/instruction: 11/11</li> <li>Contracted service (fax service line): 11/11</li> </ol> </li> </ol> <p>Contracted electronically to be used shortly the contract in the presence of record, scan back, etc.</p>

## Should You Dissolve a Partnership?

### Considerations

- ☞ Will this event happen again?
- ☞ What were the benefits of the partnership?
- ☞ Could this partnership be renegotiated?
- ☞ Who needs to be involved in the decision?
- ☞ Would conflict resolution be beneficial?
- ☞ What are the legal implications if you separate?

## Questions/Discussion



# Partnerships to Grow Your Program

## PARTNERSHIP TOOL KIT



# PARTNERSHIP READINESS ASSESSMENT TOOL

READINESS DOMAIN	QUESTIONS AND CONSIDERATION	Yes	No
<b>Personal Readiness:</b> Assess your current work load and responsibilities. Partnerships take a considerable amount of time	Do you have the inclination to work on a team?		
	Do you have the skills or resources to make this partnership successful?		
	Do you have trust and confidence about participating?		
	Do you have the necessary interest or time?		
	Do you have the authority to carry out the responsibilities of this partnership?		
<b>Organizational Readiness:</b> Assess the value of the partnership. Will you benefit from the time, money, and other resources?	Does the organization see a benefit in the partnership?		
	Does the organization have a specific person identified that would act as the company's representative?		
	Does the organization have a clear sense of how much time and resources are needed to make this partnership successful?		
	Does the organization have trust and confidence in the partner?		
	Does the organization have partnership experience?		
<b>Partnership Readiness:</b> Assess the potential partner's personal and organizational readiness	Do they have the inclination to work on a team?		
	Do they have the skills or resources to make this partnership successful?		
	Do they have trust and confidence about participating?		
	Do they have the necessary interest or time?		
	Do they have the authority to carry out the responsibilities of this partnership?		
	Does the organization see benefit in the partnership?		
	Does the organization have a specific person identified that would act as the company's representative?		
	Does the organization have a clear sense of how much time and resources are needed to make this partnership successful?		
	Does the organization have trust and confidence in the partner?		
Does the organization have partnership experience?			

\* Adapted from LERNS Creating and Sustaining Partnerships

# Partnership- Action Planning Tool

**Goal Number:**

**Goal:**

**What needs to be done to accomplish this goal?**

**Who is responsible to track this?**

**Who will do the work?**

**What resources are required?**

**What support is needed from others?**

**What is the timeline for the work?**

**When are the key milestones in this timeline?**

**What are the key decisions that need to be made along the way?**

# Partnership Responsibility Checklist

The party(s) tasks and responsibilities are in accordance with the following addendum:

ID	Task	Considerations	Party(s) Responsible		
			P1	P2	P3
<b>a</b>	<b>Logistics/Site Selection</b> Venue, location(s) and date(s)	Who will be responsible for establishing the venue, location, and event dates? <ul style="list-style-type: none"> <li>Date(s) _____</li> <li>City _____</li> <li>Venue _____</li> </ul>			
	Registration	Who will set-up, coordinate, and manage registration?			
	Cancellation Decision	Who will determine the go/no go of the event? <b>Upon cancellation, the parties have no further obligation to one another.</b>			
<b>b</b>	<b>Promotion</b>				
	Marketing Plan	Who will establish a marketing plan and promotional timeline?			
	Marketing Development	Who will develop and produce the marketing materials?			
	Marketing Promotion	Who will promote the event base on the marketing plan?			
	Exhibits/Sponsors	Who will be responsible for prospecting and payment of exhibitors or sponsors (if applicable)?			
<b>c</b>	<b>Production</b>				
	Instructor/Faculty Recruitment	Who will recruit, validate, and secure the instructor for the event?			
		Who will negotiate and set the instructor fee, including meals and travel?			
	Materials	Who will prepare, produce, and provide course materials?			
	Audio/Visual	Who will arrange audio/visual for instructor (ex. Laptop, flipcharts, projector, etc)?			
	Food and Beverage	Who will be responsible for any F&B for the event?			
	Onsite or Event Coordination	Who will run the event, day of, including onsite registration, onsite coordination, and venue billing if applicable?			
<b>d</b>	<b>Financial Model</b>				
	Registration Fee	Who will determine the registration fee for the event? <b>See Addendum B</b>			
	Event Budget	Who will establish the budget for the event and execute a revenue share agreement? <b>See Addendum B</b>			
	Final Accounting Report	Who will be responsible for gathering all the revenue/expenses and produce a final accounting report to all stakeholders?			
	Payment Distribution	Who will distribute payment of surplus or collect payment in the event of surplus deficit?			

Part 1 \_\_\_\_\_ Lead Name \_\_\_\_\_ Signature \_\_\_\_\_  
 Part 2 \_\_\_\_\_ Lead Name \_\_\_\_\_ Signature \_\_\_\_\_  
 Part 3 \_\_\_\_\_ Lead Name \_\_\_\_\_ Signature \_\_\_\_\_



# Partnership Evaluation Tool

Event \_\_\_\_\_ Date \_\_\_\_\_  
Partners \_\_\_\_\_

Partnership Evaluation. At the conclusion of the above event, the following information should be generated. A copy should be passed on to your partner and a copy should be put in the event file to reference.

## A. Student Evaluations

1. Overall, were you satisfied with this course? Yes \_\_\_\_\_ No \_\_\_\_\_
2. Fill in your response to the following questions:  
*1-very poor, 2-needs improvement, 3-okay, 4-good, 5-excellent*  
Was well prepared for each session. \_\_\_\_\_  
Made the goals and objective clear at course. \_\_\_\_\_  
Stimulated discussion and group involvement. \_\_\_\_\_  
Provided individual help when needed. \_\_\_\_\_
3. Comments. On a separate sheet of paper, list key comments on what participants liked about the course and improvements they suggested.
4. Testimonials. On a separate sheet of paper, list key testimonials along with the person's name. Make sure to hold their evaluation form on tile because it has their signature approving the use of their testimonial.

## B. Speaker(s) Evaluation

1. Overall, were you satisfied with this course? Yes \_\_\_\_\_ No \_\_\_\_\_
2. Fill in your response to the following questions:  
*1-very poor, 2-needs improvement, 3-okay, 4-good, 5-excellent*  
Was the staff helpful? \_\_\_\_\_  
Was your room prepared for your course? \_\_\_\_\_  
Did the learning environment meet your needs? \_\_\_\_\_  
Did the description clearly outline your course? \_\_\_\_\_  
Did your programmer give you feedback? \_\_\_\_\_
3. Comments. On a separate sheet of paper, list key comments on what teachers liked about the course and what improvements they suggested.
4. Testimonials. On a separate sheet of paper, list key testimonials along with the person's name. Make sure to hold their evaluation form on tile because it has their signature approving the use of their testimonial.

## C. Performance Analysis of the Event

Price of Event	
Total Registrations	0
Total Income ( <i>Price * Registration</i> )	\$0.00
Total Cost of Promotion	\$0.00
Speaker Salary or Honorarium	\$0.00
*if there was additional promotion beyond the catalog listing, attach a copy of this evaluation.	
*To figure the promotional cost of a course in a catalog divide the total cost of the catalog (desktop, materials, mail, etc.) by the number of courses	
Supplies	\$0.00
Travel Expense	\$0.00
Rent	\$0.00
Additional Expenses	\$0.00
Total Cost of Production (instructor, Materials, Space)	\$0.00
Total Direct Cost ( <i>Total Cost of Promotion + Total Cost of Production</i> )	\$0.00
Operating Margin ( <i>Income - Direct Costs</i> )	\$0.00

**D. Half-Life:** The number of weeks/days prior to the course when 50% of the registrations were generated.

**E. Participant Analysis Report.** On a separate paper, breakdown the student's demographics: Age, Sex, Geography, and Education Level.

**F. Partnership Evaluation**

1. Overall, were you satisfied with this event? \_\_\_\_\_
  2. Rate the speaker(s) on the Likert Scale (1-5) \_\_\_\_\_
  3. Were the mission, vision, and goals of the event met? \_\_\_\_\_
  4. Was the Partnership Action Plan followed? \_\_\_\_\_
  5. Was there effective communication between the partners? \_\_\_\_\_
  6. Were the milestones of the timeline met? \_\_\_\_\_
  7. Are there additional partners to approach for this event if it is scheduled again? \_\_\_\_\_
- What further action steps would you take to improve this event? \_\_\_\_\_

# Dissolving a Partnership Tool

Please consider the following:

What have been this partnership's successes?

What did each partner contribute that was important?

What can be done to acknowledge each member's contribution?

Who outside the partnership should be recognized, and how?

What is important to convey to people outside this partnership about its dissolution?

Do you have ideas for a formal or informal way to end the partnership?

Who should be a part of this event?

Do you have ideas for how we can capture the learning of the partnership?

Do you have ideas for how we can capture the history of the partnership?



## LIFELONG LEARNING 2012

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### Pinterest and InfoGraphics

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

## **PINTEREST**

**SUZANNE KART, M.A., CEP  
DIRECTOR OF MARKETING, LERN**

#lern2012 @suzannekart

## What is Pinterest?

- New social networking platform that allows users to “pin” images or video to boards they setup.
- Boards usually have a common theme.
- It also allows users to comment on other users’ pins and repost them.

#lern2012 @suzannekart

## Another way to look at it...

- It’s a virtual pin board that allows you to organize and share images you find on the web.



#lern2012 @suzannekart

## What is a pin?

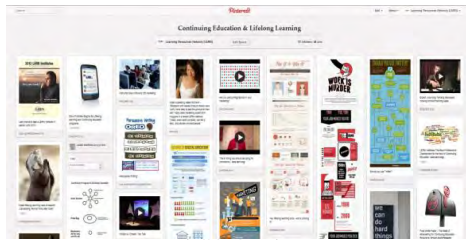
- A pin is an image added to Pinterest. A pin can be added from a website using the Pin It button, or you can upload images from your computer. Each pin added using the Pin It button links back to the site it came from.



#lern2012 @suzannekart

## What is a board?

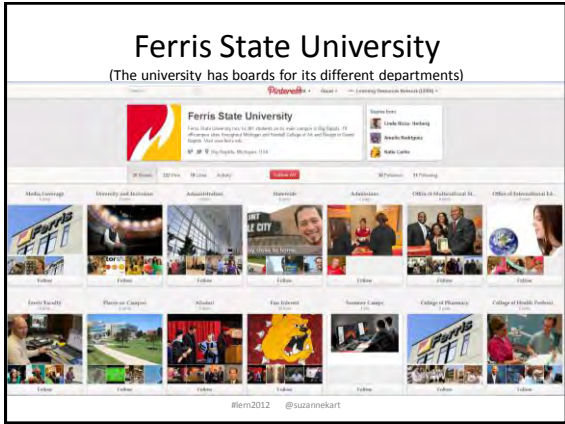
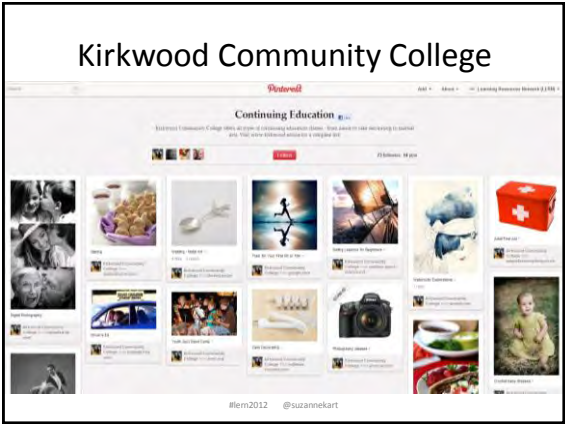
- A board is a set of pins. A board can be created on any topic.



#lern2012 @suzannekart



<http://pinterest.com/lernupdates/continuing-education-lifelong-learning/>



## Who is using Pinterest?

- 68% Female
- 89% under age 55
- iPhone app downloaded 200,000 time per/day
- 14 minutes average time spent on Pinterest
- 2.3 billion page views just in March
- Over 4 million daily unique visitors

#lem2012 @suzannekart

## Pinterest is the third most popular social networking site\*

1. Facebook
2. Twitter
3. Pinterest

\*Direct Marketing News, April 6, 2012

#lem2012 @suzannekart

## The growth of Pinterest means its going to be a powerful force for marketers

#lem2012 @suzannekart

## Getting started on the right track

#lem2012 @suzannekart

## Use strong visual content

- Whatever you are trying to promote needs to be linked through an engaging visual that others will want to re-pin and share with their connections.

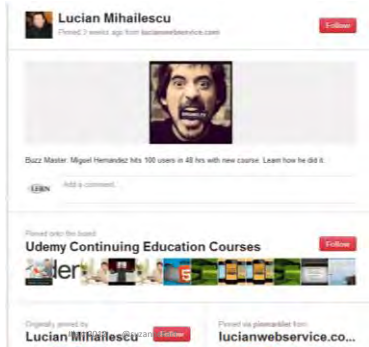
#em2012 @suzannekart

## Showing off the work of student successes



## Udemy Continuing Education Courses

- <http://pinterest.com/intercer/udemy-continuing-education-courses/>



## Christen Collins (hyperlinked)



## Learning Resources Network (LERN)



## Info graphics and charts get results

- We're seeing more and more social media users share info graphics in lieu of just data.
- Pinterest is the perfect place to get out the visual interpretations of your data.

#em2012 @suzannekart

## What is an info graphic?

- Graphic visual representations of information, data or knowledge.

#lem2012 @suzannekart



## Why use info graphics in marketing?

- Info graphics are easily **transportable**... Other people can easily upload and post them
- Info graphics **attract** a lot of attention. The visual representation of the data means they often go viral because they are so interesting.
- SEO – If someone posts your info graphic, you typically ask them to also put a link back to your site with some juicy keyword in it. That link back improves your SEO

#lem2012 @suzannekart

## State of Digital Education



#lem2012 @suzannekart

## Wordle.net



#lem2012 @suzannekart

There is an easy way to make your own info graphics!

[tinyurl.com/MakeInfographics](http://tinyurl.com/MakeInfographics)

#lem2012 @suzannekart



## Basically, here's how it works

- You create the sections of your info graphic on separate slides.
- You save them as picture files.
- You splice them together using a free web service.

#lern2012 @suzannekart

Here's the one I created for this conference

Find it at [Pinterest.com/lernupdates](https://www.pinterest.com/lernupdates)



#lern2012 @suzannekart

Info graphics aren't the only thing to share on Pinterest, though

#lern2012 @suzannekart

## Memes are fun too!

- And they get shared, when they're good

#lern2012 @suzannekart

## Promoting this conference

- I made this one in Microsoft Publisher and saved as a jpeg



#lern2012 @suzannekart

My husband thought he was being funny...

- But he showed me a great free service
- Quickmeme.com



#lern2012 @suzannekart

So I made my own!

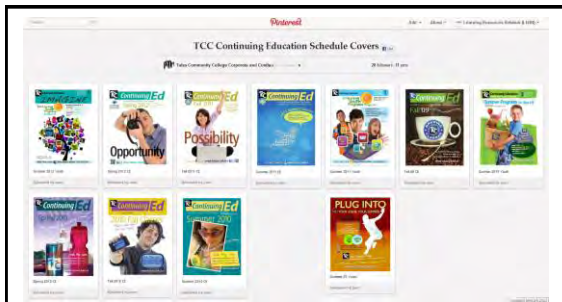


#lern2012 @suzannekart

Promote your catalog by sharing a screenshot of the cover

- Reusing the visual not only creates a consistent message, it also reinforces in the mind of your customers the images associate with your program.

#lern2012 @suzannekart

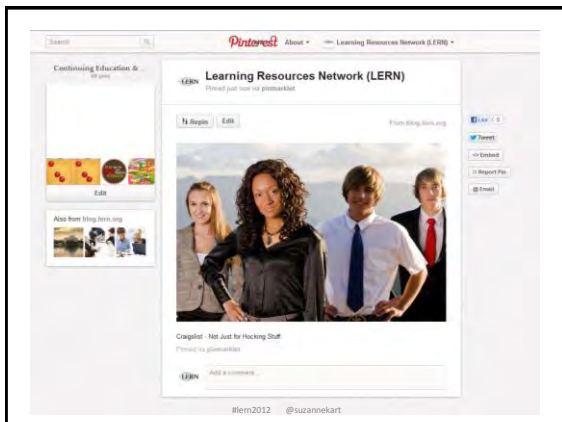


[Tulsa Community College Corporate and Continuing Ed](#)

Promote your blog posts

- Every blog post you create should have an eye-popping visual to accompany it.
- You can post that visual to Pinterest and it links back to your blog.

#lern2012 @suzannekart



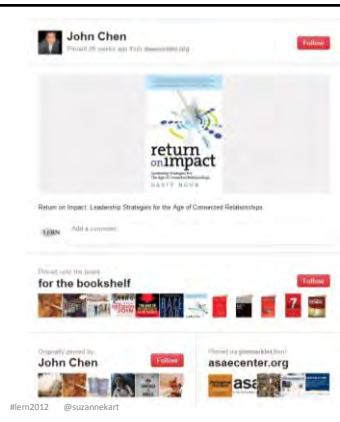
#lern2012 @suzannekart

Pictures from one of your events

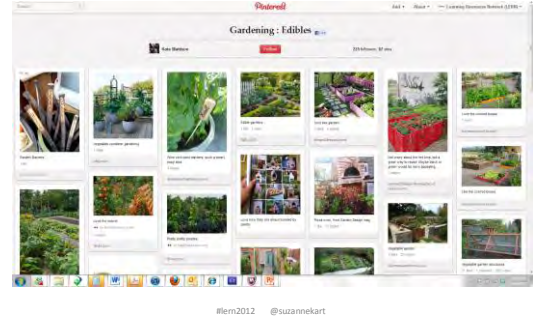


#lern2012 @suzannekart

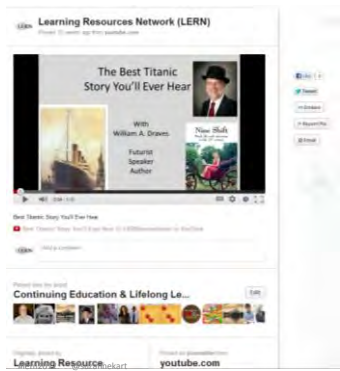
This pin links back to the ASAE Bookstore and a product they're selling



Here's a whole board just on gardening



You can also link YouTube videos

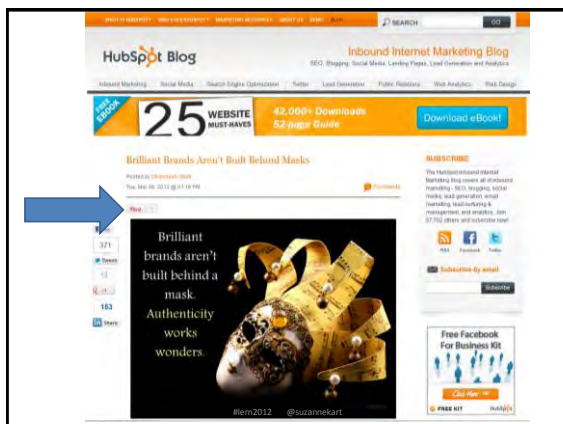


Put a "Pin-It" button on your website

- Most websites already have buttons for social media sites like Facebook, Twitter, and LinkedIn – and now is the time to add one for Pinterest

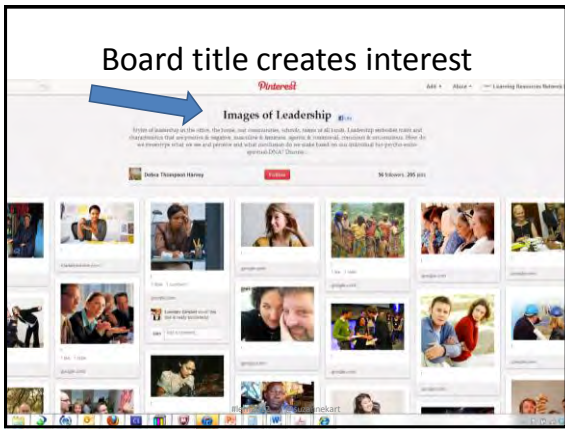
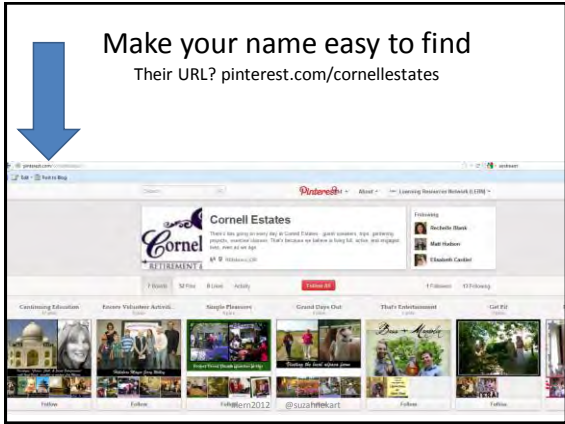
Where do you get the widget?

- <http://pinterest.com/about/goodies/>



**MORE PINTEREST MARKETING STRATEGIES**

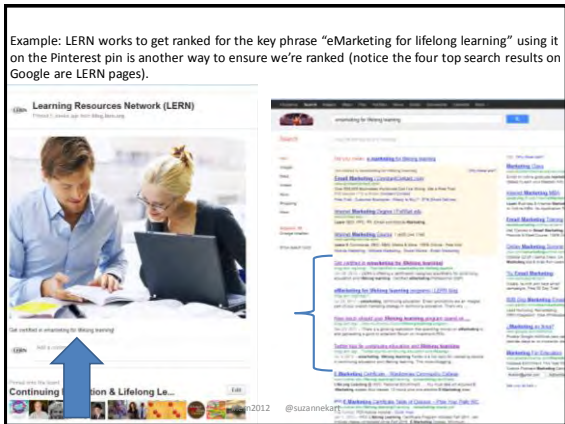
#lem2012 @suzannekart



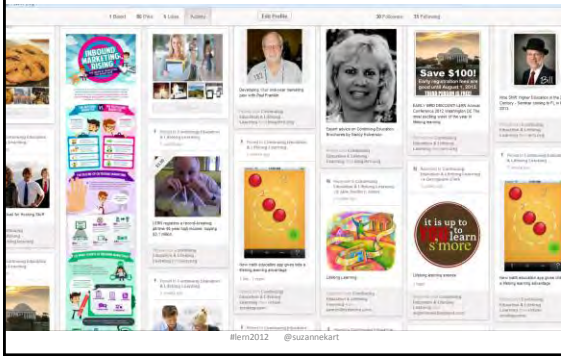
Use keywords in descriptions

- You already are using keywords to increase your SEO on your websites – do it on Pinterest, too.

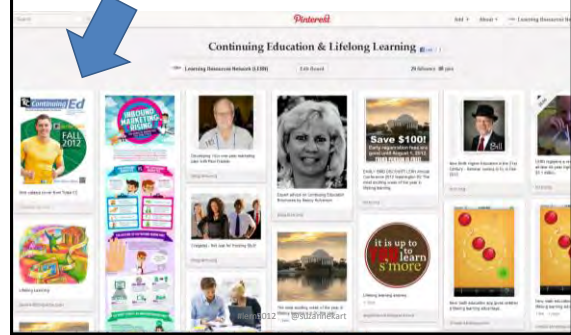
#lem2012 @suzannekart



Mix content – use yours and others



Pin images from your key constituents



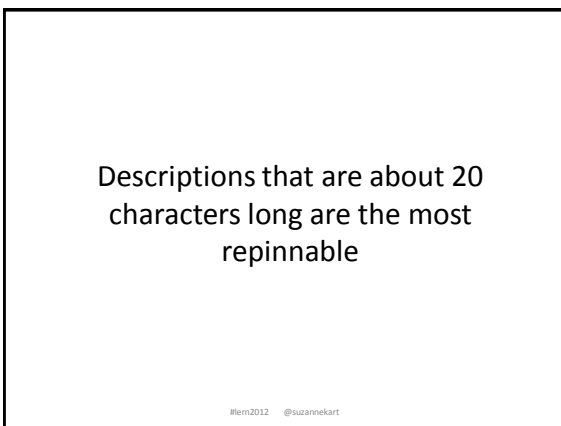
Repin supporting images



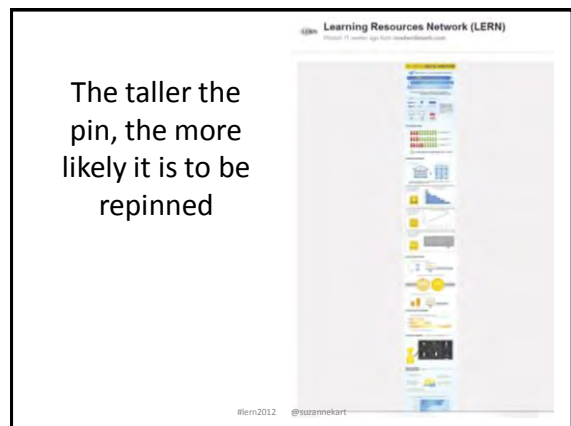
SOME PRELIMINARY DATA ABOUT PINTEREST\*



Descriptions that are about 20 characters long are the most repinnable



The taller the pin, the more likely it is to be repinned



The more “likes” a pin gets, the more likely it is to be repinned

#lern2012 @suzannekart

Questions?



#lern2012 @suzannekart

Thank you!

- Suzanne Kart
- [kart@lern.org](mailto:kart@lern.org)
- Connect with via social media at [suzannekart.com](http://suzannekart.com)
- [pinterest.com/lernupdates](http://pinterest.com/lernupdates)



#lern2012 @suzannekart



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### 7 Essential Ingredients of Successful Facebook Business Pages

Jennifer Selke  
University of California-Berkeley  
Berkeley, CA

# 7 Essential Ingredients For Your Facebook Business Page

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Jennifer H. Selke, Ph.D.

[www.jennselke.com](http://www.jennselke.com)



1.

2.

3.

4.

5.

6.

7.





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### Best Web Sites of the Year

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

## Best web sites

Suzanne Kart, CeP, M.A.  
Director of Marketing

LERN



## Challenges of web design

- Seldom do we have complete control over what it will look like.
  - May have to conform to style of an umbrella site
- Don't always have access to a professional web designer
- Time is at a premium

## BEST SITES SHARE COMMON ELEMENTS

## Simple layout

- Pages read straight forward from top to bottom
- Less eye skipping
- Solid browsing experience





## Centered orientation

Left-oriented layouts are much less common than they used to be.  
Also, liquid (full-width) layouts are less popular.



## Design the content, not the page

- Don't decorate, communicate
- Softer, receding page "furniture" (permanent elements)
- Strong color and 3D effects that draw attention to the content itself

Website literally sits on the “furniture” and the photo changes ever few seconds

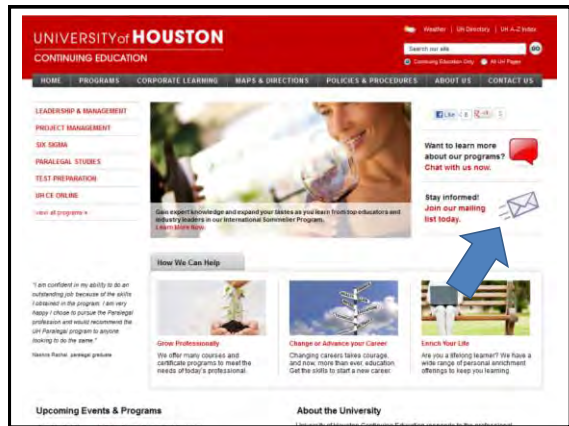


They color-coded their permanent elements so you can find what you’re looking for even easier



Icons, used sparingly

- Icons can convey a message quickly



Nice big text





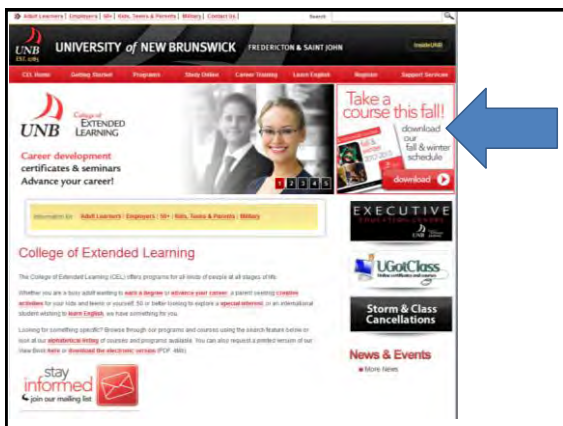
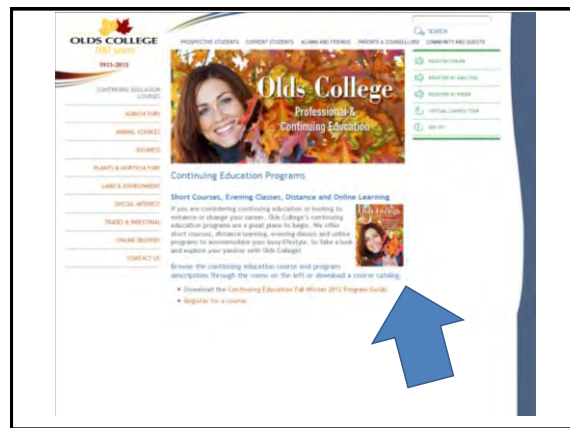
Your print catalog still generates 75% of registrations

- DO NOT ELIMINATE THE PRINT CATALOG

eMarketing strategies that work

Brochure/Web Mix

- Picture of brochure on Home Page
- URL on cover and back cover of your brochure
- Encourage people to go to your web site
- Sign up for mailing list on your web site
- Encourage people to register online



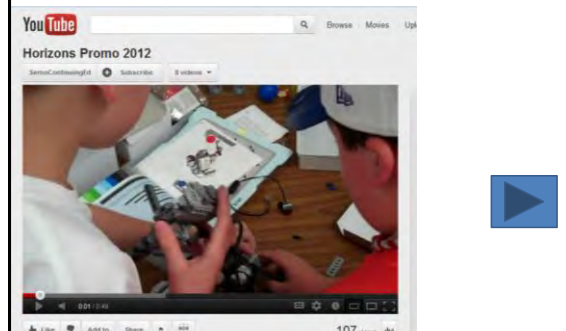
Web site strategies that work

- Multimedia and interactive features enhance interest
- Video clips, audio, color, pictures, animation, photographs, all generate more interest
- Polls, blogs, social networks and other interactive features get people involved, which leads to more registrations
- Live Person and other ways to communicate all help

## YouTube

- 70% of Americans use YouTube
- Allows your customers to actually see something about your program

## Southeast Missouri Continuing Education



## Some other great web site techniques

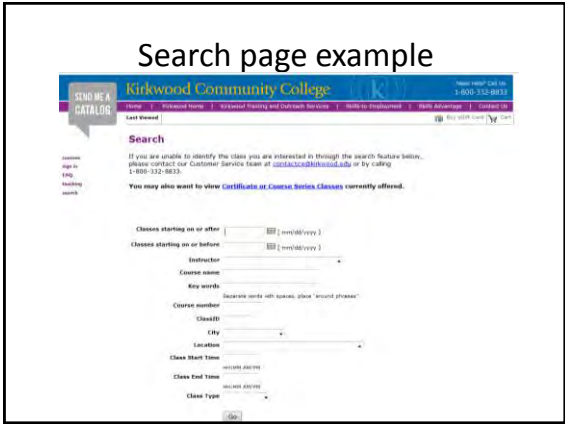
## Promote online registration

- Online registration is more cost effective
- It allows you to respond better and faster
- It creates more services and benefits for learners
- It will lower staff time
- It is the way people purchase in the 21<sup>st</sup> century
- Eventually 90% of registrations will be online



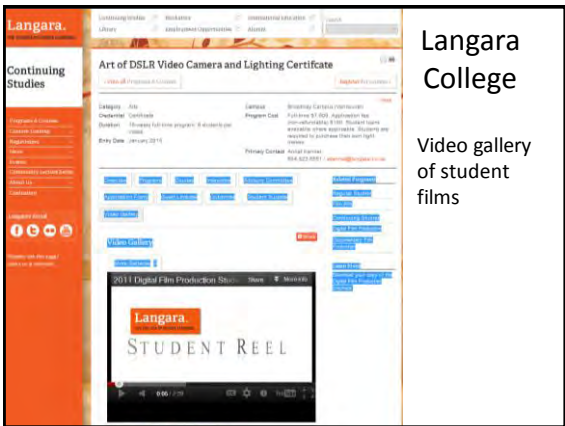
## Search pages

- Recommend at least four ways to search:
  - Location
  - Category
  - Course number
  - Key word search
- The more ways to search, the better.



## Search page example

Ways past participants can help improve your web site.



## Langara College

Video gallery of student films

Post past participant work on your web site

- It shows potential participants what others have done.
- The message is “you too!” can do this.
- It is peer-to-peer marketing.

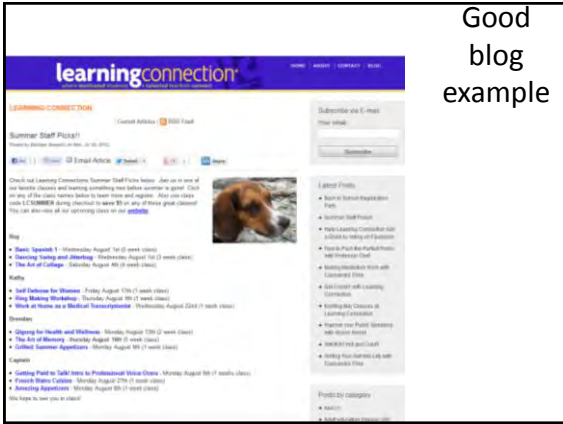
Have your customers create content – that’s web 2.0!

Think -

- Surveys
- Feedback
- Preferences
- Learner projects
- Comments
- Pictures
- Video clips

Examples of social media

- Blogs
- Twitter
- LinkedIn
- Facebook
- Podcasting
- YouTube



Good blog example

### Is Twitter a fad?

- No.
- It already has 70 million users

### Twitter

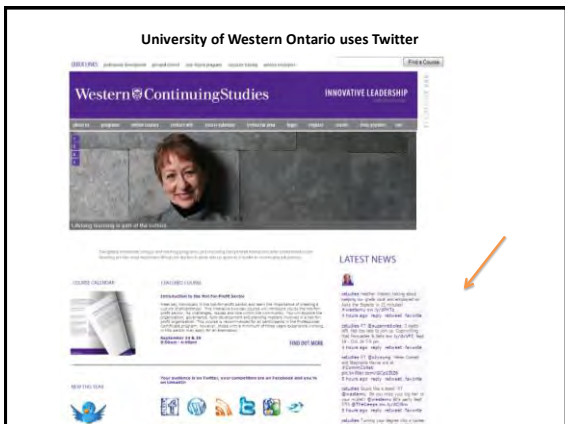
- Twitter is a micro-blogging social networking tool where you can post short messages (no more than 140 characters).

### How do we use it?

- People have to be a “follower” to receive your tweets.
- Put a link on your web site so that your regular customers can start to follow you.
- You also need to start following others.

### Twitter is a pull communication

- Good way to give people a heads up on something new
- Make it worth someone’s time to “follow” you, don’t oversell, update.





## Facebook is way for organizations to connect with individuals

- Fan pages allow organizations to create a page without having to pretend the organization is a person.
- Fan pages allow individuals to become “fans” and receive messages from the organization.
- Fan pages allow individuals to suggest the page to their friends.
- Fan pages allow individuals to post comments.



## LERN web site Critique

### What we do:

- We analyze your site's effectiveness for marketing, navigation, course descriptions, online registration and more.
- We provide feedback on how to improve key elements, what visitors expect, what you are doing right, and how to make your site more “visitor-friendly.”

### How to get one:

- The web site critique service is FREE for LERN members and available for a nominal fee for non-members.
- Send the URL for your program to Debbie Barron at [debbie@lern.org](mailto:debbie@lern.org) and tell her you want a LERN web site critique.
- Call 1-800-678-5376 or email Debbie for more information.

## Thank you!

- Suzanne Kart
- [kart@lern.org](mailto:kart@lern.org)
- Connect with via social media at [suzannekart.com](http://suzannekart.com)



#lern2012 @suzannekart



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Building Support for the Field

Rita Martinez-Purson  
University of New Mexico  
Albuquerque, NM

## Building Support for the Field

Presented by Dr. Rita Martinez-Purson  
Dean Emerita, University of New Mexico  
Assistant Dean, University of Arizona

## One Definition of Power

*The ability to influence others to meet strategic goals in our continuing education organizations.*

## Power and Influence is Built on Trust

*In the end, our growth potential is directly impacted by the trust we build.*

## 4 Cores of Credibility

- Integrity
- Intent
- Capabilities
- Results

*From: The Speed of Trust. Stephen M.R. Covey*

## Position to Grow

*Our ongoing quest is to build support by building Credibility.*

A learning organization is a type of organization that has "learned" to react and adapt to its environment.

*To build support we need to be listeners, learners and teachers.*

**We need to learn about systems**

*Without a systemic orientation, there is no motivation to look at how things interrelate.*

-Peter Senge, *The Fifth Discipline*

**We need to learn about stakeholders.**

*Some Stakeholders*

- Regents
- State Government
- Students
- Donors
- Faculty
- Staff
- Accrediting Agencies
- Alumni
- K-12 schools
- Community Leadership
- Etc.

*A Sampler of Values*

- Work load
- Number of graduates
- Affordability
- Flexible scheduling
- # of high achieving students
- Safety
- Access to professional development
- Accountability
- Etc.

**We need to learn about Organizational Culture**

- Culture is part of the system
- Involves shared attitudes and perceptions
- Organizational values and behaviors
- Environmental and organizational realities that influence the organization and how members think about themselves, their fellow employees and their work.

**Contributing factors to the culture**

- Leadership and its values
- Mission and vision
- Values of other key stakeholders
- Historical factors
- The organizational structure and business model
- Globalization, work force diversity, technological innovation
- Political factors
- Survival considerations (e.g. a merger, a financial crisis, etc.)
- Agility, confidence, professional maturity

**Understanding the impact of these elements on the organization will enable Continuing Education professionals to build influence and support.**

***Reflect on Your Organization's History***

<u>Events</u>	*Distant* Past (Jan 1996-June 2007*	*Recent* Past (July 07-June 2012)	Future
Events at CE			
Events in the larger university			
Events in the world of our customers			

### Set Learning Goals and Strategies

So *assess the culture* of the larger organization, determine what you need to learn about customer needs within key units, and how you will position for ongoing learning and service.

### Consider Your Unit's Reputation

- How do you and the members of your team feel about how your unit "fits" into the larger organization? *What image would you like to have?*
- *Discover the gaps you need to fill in information your stakeholders need about you. Fill those gaps.*

### Increase Awareness of Current Image

Consider an organizational survey, focus groups and/or customer visits to assess your image in the organization.

### What the larger organization thinks about us

- "Why aren't you more of a 'Cash Cow?'"
- CE has different rules: a "problem child"
- "What *IS* the CE function?"
- CE's program quality is different or "less than" other programs
- CE's non-credit instructors aren't as good as credit instructors
- CE moves too quickly, and isn't strategic enough
- CE is high risk and moves into unproven territory
- CE is so money-driven, it loses focus on quality
- CE competes for enrollments, classrooms, instructors and other resources

Provide clear honest information to key stakeholders on a timely basis.

*Develop the image you seek and correct misperceptions .*

### Internal Marketing

- Quarterly and annual reports
- Show and tell: marketing plan, sales plan, quality improvement initiatives, your unit's strategic plan
- Newsletters to students, instructors, staff
- Informational Memos
- Share congratulations
- Show your knowledge
- Be of service
- Other strategic promotional messages and materials

### Sample Briefing to a New President

- Mission and Vision: How CE adds value for the learner, university, the community and state (overview)
- Programs and Services Overview
- Operational Strategies
- Strategic Goals
- How the CE brand creates powerful promotional impact statewide
- How we play a key role in the university's strategic direction
- Overview of customer demographics and how this broadens university outreach & impact
- How our customers see us: assessment and quality indicators

### Sample briefing, cont'd.

- How we foster alliances locally and globally
- Models we have developed as benchmarks
- Our impact on economic and workforce development
- Customer stories, testimonies, examples from business
- Financial Overview

### Sample: Core Competencies

- Serving the training needs of statewide business and industry
- Innovative programs
- Financial accountability
- Entrepreneurial
- Marketing expertise
- Quality customer relations management, advising and registration
- Community engagement
- High volume contracts
- Quality Customer Service
- Customized Program development
- Diversified and flexible portfolio
- Agility, rapid response
- Trusted partnerships with academic units
- History of service to the adult learner and lifelong learners

### Networking Strategies to Build Influence: "Working the Room"

Remember the big goal: "Development of linkages that lead to trusted relationships"

- Know who you have to see
- Make the connection
- Move in and move on
- Use the buddy system if needed
- Get and share business cards/business networks

### Working a Room, con'td...

- Prepare your key messages and questions
- Professionally approach and be approachable
- Use effort, energy, enthusiasm, humor
- Follow up with information or a meeting

### Host Strategic Networking Events

Networking lunches, fundraising events, legislative information sharing, business focus groups, student and instructor events. Invite stakeholders and central administrators.

Include targeted networking into existing programs and events.

### Some Tips on Politics

- Understand your own values and goals
- Recognize the power brokers. Seek to understand their values and needs, and how you can meet those needs.
- Never embarrass or compromise a power broker. Be careful what you share, and with whom.
- Be a visionary leader and chart a clear course
- Recognize what you need from those in power and begin to strategize and position for success.
- Understand when to “get on” or “stay off” the radar screen

### More tips...

- In any scenario: Stay in touch with what’s happening.
- Don’t assume a position without being fully informed.
- Realize the power of knowledge, competency, integrity, creativity and problem-solving
- Be professional. Craft your image and messages. Watch your emotions.
- Become your unit’s power broker based on what you can provide to students, the community, the larger organization.

### Some Key Personal Accountabilities

- Quality
- Integrity
- Loyalty
- Reliability
- Respect and professionalism
- Service orientation

*Don’t compromise these.*

### Where to be at the Table (or at least in the audience)

- Organization-wide strategic planning
- Cabinet meetings or other executive level meetings
- Instructor orientations
- Student/client meetings, gatherings, forums
- Key community leader groups
- Legislative gatherings
- Meetings of other key constituent groups
- National and global networks

*Key Point: Build influence in stakeholder circles*

### Goal I: Learn all you can

#### Objectives

- To know your stakeholders, their networks, and the culture and climate in which they operate
- To understand policy, protocol, real and “unwritten” rules
- To understand the top issues your Central Administration is facing and the long-range strategic plan for the organization
- To learn how you can best grow and contribute.

### Goal II: Be Part of the Plan

Strategic planning is the best tool for organizations to use in articulating their vision and direction so that everyone can contribute, understand and support the vision.

*We must be part of the bigger vision.*

**Goal III: Share your goals,  
successes, strategies**

**Some Objectives:**

- To make key stakeholders aware of your unit and how it serves the mission in outstanding ways.
- To invite future support for increased success.
- To respond to and correct misperceptions.

*Be a teacher and promoter.*

**What we Bring to the Table**

- Service to students, community, state and beyond
- Constituent groups that can support the larger organization
- Expertise in unique ways to solve problems and meet needs
- Partnerships to broaden the work of the whole
- Leadership to bring dynamic, responsive education to the community





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NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Data to Collect, Reports to Run

Greg Marsello  
Vice President  
LERN  
Tiverton, RI

## Data to Collect, Reports to Run

Washington, D.C.  
Conference 2012  
Greg Marsello



## What Data?

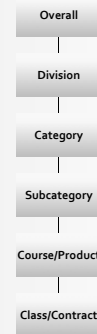
- Registration
- Programming
- Marketing
- Sales



## How?



## Drill Down



## Data to Collect & Reports to Generate Handout



**THANK YOU!**



GREG MARSELLO  
[www.lern.org](http://www.lern.org)



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# Promotion Techniques That Work

Rick Walsh  
Consultant  
LERN  
Virginia Beach, VA

Promotion is a subset of marketing and leads directly to registrations and income.

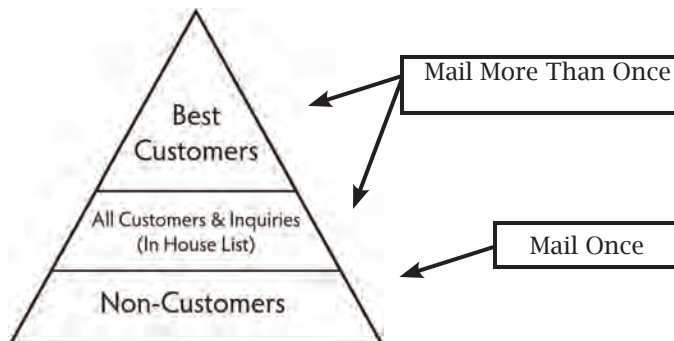
### 1. 4 Types of Promotion

Where to put your time, money, & resources

	<i>Individual</i>	<i>Mass</i>
<i>Paid</i>	Direct Mail 75%	Advertising 5%-10%
<i>Unpaid</i>	Customer Service 5%	eMarketing & Publicity 10%-15%

### 2. In-House Mailing List: Your Best Source of Responses

In-House mailing list consists of recent participants & inquiries. This should be your primary focus of mailings.



Mail more than once to your best customers and once to your non-customers.

### 3. New Customers Are More Expensive

Six Times More Expensive to Get a New Customer

Mailing	Response Rate	Registrations	\$ per Customer
6,000 past participants	6.00%	360	\$4.17
30,000 new participants	1.00%	300	\$25.00
36,000 total	1.83%	660	

Using the cost of each promotion @ \$.25

#### **4. Use 3 Distribution Methods**

- Print
- Electronic
- Other Options or X Factor

#### **Community X Factor Distribution Options**

- a. In-house Mailing List
- b. Rental Mailing Lists
- c. Household Distribution
- d. Street Distribution
- e. Newspaper Boxes
- f. Newspaper Inserts
- g. Meeting Locations
- h. Libraries
- i. Special Events
- j. Requests
- k. Partnerships
- l. Staff Distribution

#### **Continuing Professional Education (CPE) & Conference X Factor Distribution Options**

- a. In-house Mailing List
- b. Rental Mailing List
- c. Postcards
- d. Faxes
- e. E-mail
- f. Direct Mail Letters
- g. Direct Mail Packages

#### **5. Develop a Relationship With the Media**

A positive working relationship with the media helps you promote the new courses. Remember that they are looking for something “new” or “timely” to report.

#### **6. Let Your Teachers Speak for You**

Your instructors make terrific speakers on interesting topics. Let them help promote their classes by speaking to local groups.

## 7. Testing

Test one variable at a time to best determine the effect of the change.

1 variable



## 8. Tracking

A method for determining how well a given promotional effort works without creating undue risk for your program. Don't assume you know how people got your brochure.

- a. Track everything but not everyone.
- b. Analyze the data to determine where to place your resources.
- c. Code the registration form, the mailing label or both
- d. Ask people how they got a brochure.
- e. Track inquiries as well as registrations.
- f. Track all rented lists.
- g. Research your response rate over a period of time and take seasons, economic conditions and other unique factors into consideration.

### Tracking Publicity

- a. Make your address different
- b. Make your phone number different
- c. Make up a person in the office

### Tracking with e-Marketing

- a. Create a new and unique e-mail address.
- b. Create a new domain name or URL address for your web site. The person is redirected to your existing web site, and the computer tracks the number of people using the new domain name or URL.



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# The 8 Best Practices for Listening & Engaging Consumers in Social Media

Jennifer Selke  
University of California-Berkeley  
Berkeley, CA

# The 8 Best Practices for Listening and Engaging Consumers in Social Media

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Jennifer H. Selke, Ph.D.

[www.jennselke.com](http://www.jennselke.com)



How can you listen to the conversation about you and your business?

What tools are available to you?

Where do you start?

What are the “rules” to using and engaging your audience online?

What are examples of organizations that are doing a good job with this and those who are not?





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### A Dozen Tricks of the Trade from the Sales Pro

Rick Walsh  
Consultant  
LERN  
Virginia Beach, VA



# A Dozen Tricks of the Trade from the Sales Pro

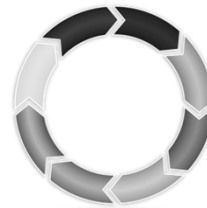
LERN 2012 – Washington DC  
NOVEMBER 16-18, 2012

**RICHARD T. WALSH, PH.D.**  
SENIOR LERN CONSULTANT



## Major Sales Stages

- **Research**
- **Planning**
- **Execution**
- **Closing the Sale**
- **Monitoring**
- **Follow-Through**





## Sales Research

- 1. Do your research before you schedule your initial sales visit**
- 2. Good research focuses on what the potential customer needs to be more successful**



## Sales Planning

- 3. Prepare a script on how you want the sales meetings to go prior to the meetings**
- 4. Identify and arrange to meet with the real decision makers**





## Sales Execution

- 5. The initial sales meeting is an extension of your research – collect more info**
- 6. Identify and get validation regarding your customer's real business needs**



## Closing the Sale

- 7. Design a solution that addresses the customer's needs and fits their organization**
- 8. Recognize when it is time to close the deal – stop selling and close the deal**





## Sales Monitoring

- 9. Track deliverables and your organization's performance compared to your plan and commitments**
  
- 10. Continue to meet with your customer during the execution phase**



## Sales Follow-Through

- 11. Measure outcomes compared to your proposed commitments**
  
- 12. Maintain a good relationship from which you can develop more opportunities**





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### Best Brochure Ideas for 2012

Nancy Hulverson  
LERN  
Bellevue, WA

# Best Brochure Ideas

## LERN Annual Conference – Washington DC

**facebook**

facebook helps you connect and share with the group to your like.

**Information Videos!**  
[www.greatoaks.com/adult](http://www.greatoaks.com/adult)  
 For more details about all our career development training programs, go to [www.greatoaks.com/adult](http://www.greatoaks.com/adult), click on the career training programs for adults, and choose an individual program. Here you will find a 2 minute informational video which will give you a snapshot of the training.

# Videos

**Spinning™ WFA-7040**

Some group fitness classes can leave you feeling frustrated trying to follow complicated choreography. There are no complicated moves in Spinning™. You will be guided, challenged and encouraged by a certified Spinning™ instructor in an atmosphere that will help you focus on your workout, form, spinning rate, breathing and your personal visualization! You will find that you will work more efficiently, effectively and safely using heart rate training zones! Regardless of your fitness level, you will experience a great workout.

Tuition: \$15  
Fees: \$34

**VIDEO SPOTLIGHT**

See a video of Spinning at [www.csmd.edu/CommunityEducation](http://www.csmd.edu/CommunityEducation).

# Videos

**Information Videos!**  
[www.greatoaks.com/adult](http://www.greatoaks.com/adult)  
 For more details about all our career development training programs, go to [www.greatoaks.com/adult](http://www.greatoaks.com/adult), click on the career training programs for adults, and choose an individual program. Here you will find a 2 minute informational video which will give you a snapshot of the training.

**Workforce Development**

**Welding**

**CAREER STARTERS**  
 Welding  
 60-511 Automotive Welding  
 60-512 Automotive Welding  
 60-513 Automotive Welding  
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**Check it out—video spotlight of Welding!**

# Direct readers to your web site or to YouTube using active links

**Great Oaks Career Center**

**Learning works!**

**Auto Collision Technology Class in Cincinnati | Great Oaks**

**Auto Collision Technology Training**

**Landscape Painting with Oils - District 832 Community Education**

**Direct readers to your web site or to YouTube using active links**

# Videos

## Shooting Video Clips

**Bill Strehl**  
**Sunday – at 8:00 am**

**Practical, how-to tips**

- Testimonials
- Course Excerpts
- Instructor Tapes

# Videos

**Electro-Mechanical Maintenance Technology**

**Heating/Ventilating and Air Conditioning**

**Industrial Diesel Mechanics**

**Information Videos!**  
 For more details about all our career training programs for adults, and choose an individual program. Here you will find a 2 minute informational video which will give you a snapshot of the training.

# QR Codes

**HAVE A QUESTION?**  
Scan to view Mohawk's Continuing Education AskMohawk Instant Answer Service on your smart phone

1. Download a QR code reader Mobile App to your smartphone.
2. Launch the App and scan the code - you'll be taken right to the AskMohawk page.

Points to: <http://mohawk.intelliresponse.com/m/c>

**Watch for more classes posted only online at [spokane.parks.org](http://spokane.parks.org)**

Scan it with your mobile device and join in.

- Camp Invention, Tutoring & Scrabble Camp page 25
- Registration Info page 25/26
- Gateway Academy & Badge Program Info page 26
- Big Ideas Camps page 27
- Shipping Stoles page 27

**Be an insider!**  
MCACES REAL TIME Community Education program information on our web page. Scan to see all your needs. And the new QR reader app and connect with our Community Education AskMohawk Instant Answer Service. We will be the first to tell you about all our new Continuing Education programs, this and happening!

# QR Codes

**Dental Office Administration Acknowledgment of Completion**  
Targets the needs of those looking to work effectively in dental health offices. The main objective is to prepare the student to find work in a dental environment. Students who successfully complete the full program of study will be eligible for a Dental Office Administration Acknowledgment.

Questions? [905-575-2064](mailto:905-575-2064) / [cebus@mohawkcollege.ca](mailto:cebus@mohawkcollege.ca)  
For program details visit [ce.mohawkcollege.ca/dentalofficeadmin](http://ce.mohawkcollege.ca/dentalofficeadmin)

**Adult Basic Education**  
entail • Certified, Patient Teachers • Transportation • Family School

Learn, Practice, 2017 at Mohawk  
Work on GED preparation, English, math, reading and writing skills, 24 7 online from the convenience of your home. Pay \$20 materials fee and attend an orientation and testing session at one of the ABE sites and upon completion of the program work with teacher assistance meet for a post-test on your learning. For more information email [AdultBasic@ce.mohawkcollege.ca](mailto:AdultBasic@ce.mohawkcollege.ca)

**GED** Our goal is to help you reach your goals. We offer a variety of programs as part of Online Learning including:

- GED program for the GED class
- Skills Tutor individualized instruction in reading, writing, math, science and medicine
- Mohawk competency covers for college
- English for All learn English as a second language

**Find your room before coming on campus**  
Scan code to access room listings

**We're changing! What's new and where to find us:**  
The Federal Continuing Education Registration Office has moved. You will find us now in The Square, Second Floor, Room 2122, Services for CE students in The Square building.

Registration: Room 2122  
Financial Aid: Room 2122  
Student Records: Room 2122

Call the Continuing Education Administrative Office have moved. There's where to find us:  
CE Business Division: M Wing  
CE Business Certificate: A207  
CE Patient Services: A228  
CE Engineering Technology: A222/1-423/3407  
CE Creative Arts: A207  
Theatre Education: B204

MCACES@Mohawk has replaced all Learning Management Systems (LMS). Log in to your LMS via the URL below. Use your email address as a user name to log in.

Visit the Continuing Education website at [ce.mohawkcollege.ca](http://ce.mohawkcollege.ca)

# QR Codes

**MOHAWK COLLEGE 4 ways to register:**  
Register as of Tuesday, August 14, 2012...

- By Web:** [www.mohawkcollege.ca](http://www.mohawkcollege.ca)  
Visit our website to register online. You can also register for your convenience.
- By Facsimile:** [cebus@mohawkcollege.ca](mailto:cebus@mohawkcollege.ca)  
Send your registration form to the Continuing Education Office via fax.
- By Mail:** [cebus@mohawkcollege.ca](mailto:cebus@mohawkcollege.ca)  
Send your registration form to the Continuing Education Office via mail.
- In Person:** [www.mohawkcollege.ca](http://www.mohawkcollege.ca)  
Visit our website to register online. You can also register for your convenience.

**REGISTER ONLINE NOW!**  
Don't miss out on all the great programs we have to offer. Register today!

**grow create**  
CatchTheEnergy.org

# QR Codes

**Join the MCACES Social Network**

**LOOK at WHAT YOU CAN DO!**

**CAMP ROCKS!**  
Summer 2011  
Ages 3, 4 & 5 and Current Grades K-7  
[CatchTheEnergy.org](http://CatchTheEnergy.org)

**Twitter**  
Facebook

"Like" us on Facebook & "Follow" us on Twitter! Get the latest on classes, contests & more!

**Facebook**  
You're going to "like" us!  
Scan this code to see all the great programs we have to offer. We will be the first to tell you about all our new Continuing Education programs, this and happening!

# Digital Brochures

**Community Catalog Summer 2012**

Search Results: [Search Box]

**Community**  
Expand Your World, Learn Something New!

[www.cu.edu/comm](http://www.cu.edu/comm)

# Digital Brochures

**"LIKE" Continuing Education on Facebook**  
to see local information and updates on programs and events.

[www.facebook.com/ContinuingEducation.CSU](http://www.facebook.com/ContinuingEducation.CSU)

To follow Continuing Education blogs, go to [ColumbusState.edu/CE](http://ColumbusState.edu/CE)



## Digital Brochures



### LERN Digital Brochure Software

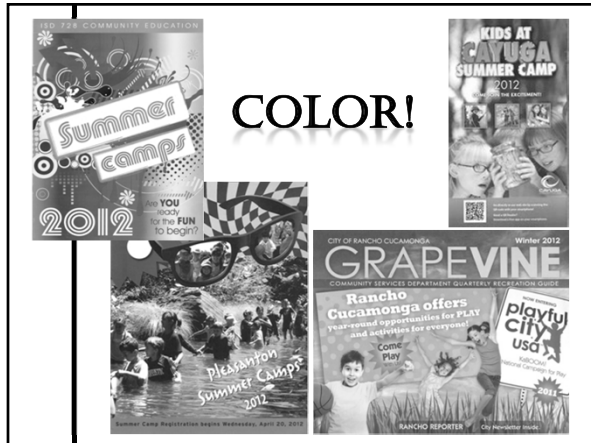
- ✓ Page-flip technology
- ✓ Active links
- ✓ Search capabilities
- ✓ Google analytics
- ✓ and much more!

## Digital Brochures

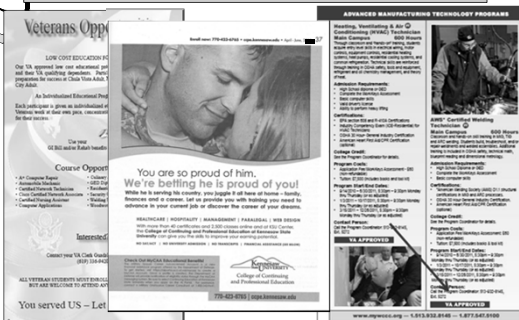
Learn how to create and use them with LERN's software  
(Software is FREE for LERN members)

Today – at 2:00 pm

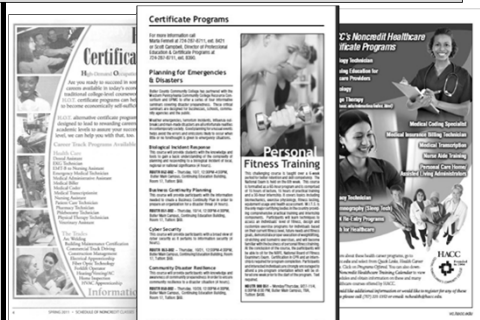
featuring Dan Belhassen, Modern Earth and Heather Dimitt, LERN



## Veteran / Military



## Certificate Programs



## Certificate Programs

**fast track programs**

**Certificate programs prepare you to...**

- Enter professions in high demand.
- Advance in your current career.
- Anticipate a better future.

**FAST-TRACK!**

**Course Leads**

Fast-track certificate or diploma in a high-demand field with a degree or diploma from a recognized institution. This is a fast-track program that allows you to complete your program in less time than a traditional degree or diploma program. You can earn your certificate or diploma in as little as 12 months. For more information, visit [www.dswfitness.com](http://www.dswfitness.com).



Many of our certificate programs are eligible for VA and WVA funding (see page 39 for a complete list). Student loans are also available. See page 60 for complete financial aid information.

## Testimonials

**How to Write Great Characters and Dialogue**

How do you write great characters and dialogue? This course will teach you how to write great characters and dialogue. You will learn how to create compelling characters and dialogue that will keep your readers hooked. This course is perfect for writers who are looking for new ways to improve their writing. For more information, visit [www.dswfitness.com](http://www.dswfitness.com).

**What People Like Best...**

"This course exceeded my expectations. I feel I have a leg up on my new career!"

How to Write Your Business Plan

How to Write Your Business Plan

## Incentives to Increase Enrollments

**Share the Fun!**

Bring a friend when you bring a friend. You get a bonus reward of membership. It's that easy! And it's our way of thanking you for spreading the word!

**Bring a Friend and you EACH receive a 20% "Bring a Friend" discount!**

Registration must be made together or within 30 days of the date of registration. One friend per registrant. Discount good for 30 days. Please see us at 800-555-1234.

**Share the Fun!**

Check out our "Bring a Friend" discount. (Limits are in effect.)

**GOT GAME?**

Bring a friend when you bring a friend. You get a bonus reward of membership. It's that easy! And it's our way of thanking you for spreading the word!

## REGISTRATION

**4 EASY WAYS TO REGISTER**

1. Register New On-Line
2. On-Line
3. On Fax-In, You Register & C/P
4. Mail-In
5. Walk-In

**Five Easy Ways to Register**

1. Register New On-Line
2. On-Line
3. On Fax-In, You Register & C/P
4. Mail-In
5. Walk-In

**587-2112**

**Parks & Recreation**

**Hours: 9am-6pm Mon-Fri 795 S 5th W 587-2112**

## Cross Promotion - Email

**Dear Nancy,**

There's so much going on in June, we could barely fit it all into one email. First, this weekend is the start of summer program registration. You should be receiving a copy of the new **Registration Family Fun Guide** in the mail soon. We've opened up the classes below for early registration as a benefit to newsletter subscribers. For all other summer session programs, sign-up sites are as follows:

- \* Saturday, June 2 - Online registration for County residents
- \* Monday, June 4 - Phone/walk-in registration for residents
- \* Wednesday, June 6 - Open registration for EVERYONE

Mark your calendar for these exciting **NEW EVENTS** this month. First, **Spokane Valley** is now open! See our special **How2Join Spokane, C/P** (Adults/Teenagers/Adult Learning Coordinator) 7pm. There will be get **New Owners?** Join us! 7:30-9:00 PM. **763.206.1277** - [mcshel@spokane.gov](mailto:mcshel@spokane.gov)

Next, **Relax to the Sound** Learning/Thinking/People/Enriching Communities meet. Finally, you will Open Hill Park June 10th of a unique breed of...

**Sign Me Up!**

Summer Camps for all ages!

**Go Guides!**

Sign up online now for spring classes and summer camps. Go! Below is browser through our interactive Fly Catalog.

## Cross Promotion - Web Site

**Montgomery College**

**Workforce Development & Continuing Education**

**Course Offerings and Schedule**

- WIOAC Home
- WIOAC Programs (A to Z)
- Schedule of Classes
- Search for a Class
- Summer Course Catalogue
- Online Courses
- C&G Schedule
- Registration Information
- By Web
- By Fax
- In Mail
- Register in Person
- Parking for WIOAC Students
- Reservations, Policies, Hours
- Maps and Directions
- Customer Service Locations
- Campus Locations
- C&G Campus Locations
- MCFP Public School Sites
- Bookstore/Textbooks
- Collaborative Customer Training

**Search for a Class**

**Online Courses**

**ed2go**

**WIOAC Noncredit Course Catalogue Electronic Flipbook Version Summer 2012**

**Noncredit Online Courses**

These classes are 100% online

## Cross Promotion - Facebook

**Facebook** Search for people, places and things

**Fall classes start September 10**

**Kirkwood Continuing Education**

Kirkwood Continuing Education

Adult Education - Community Organization  
Whether you want to advance your professional career or enrich your personal life, Kirkwood Continuing Education can help you achieve your goals.

Like | Subscribe | Message

Recent Posts by Others on Kirkwood Continuing Education

Photo by **Debra Debra**  
Can't wait to start on August 28th!  
August 28 at 8:23am

Photo by **Nancy Hulverson**  
The best place to learn a trade job!

## Cross Promotion

**Looking to become more connected or informed?**

Get updates of Aurora Parks and Rec programs and events by any or all of the following links found on our main website at [parks.auroraoh.com](http://parks.auroraoh.com)

**facebook** Become a fan on Facebook!

Become a follower on Twitter!

Subscribe to our monthly E-newsletter

**Sign Up Now!**

**Info to Go**

**Email Lists**

Want accurate, up-to-date information on the news, events & opportunities in our district emailed directly to you? Go to [www.aurorahco.k12.mn.us](http://www.aurorahco.k12.mn.us), find the icon above, click on it and choose any of the email lists you want to receive.

# LERN

*"Information That Works!"*

---

Have you had your brochure critiqued by LERN?

Or requested your Market Segment / Carrier Route Analysis?

Contact Nancy Hulverson at [nancyh@lern.org](mailto:nancyh@lern.org)

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## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Creating Mobile Apps

Dan Belhassen  
Modern Earth  
Winnipeg, MB

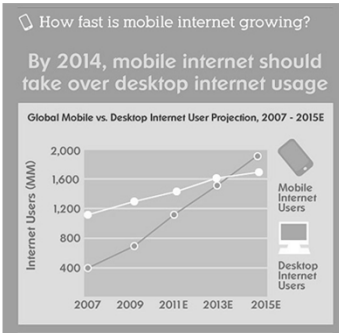
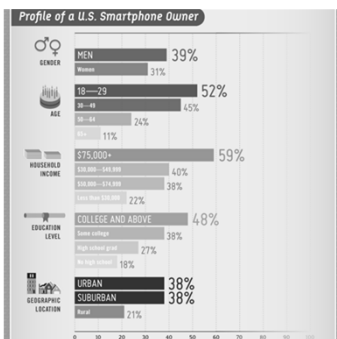
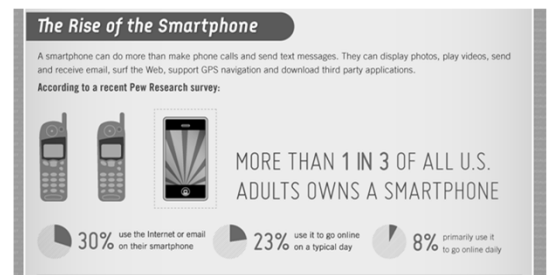
# Creating Mobile Apps

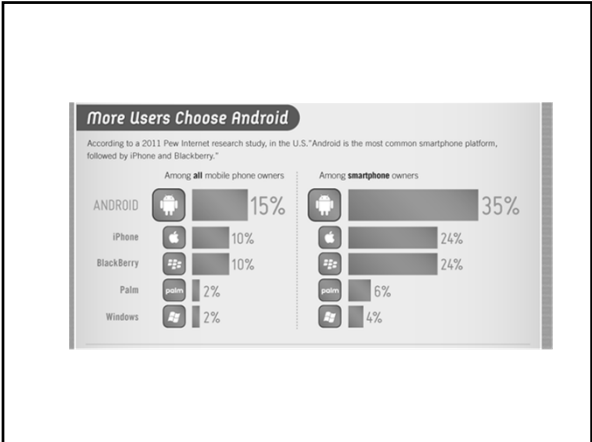
Dan Belhassen  
greatBIGnews.com  
Modern Earth Inc.

## About your presenter

- Dan Belhassen
  - Founder and President of Modern Earth Inc., an Internet technology company
  - Website creators, online software developers, search engine consultants, mobile app developers, elearning specialists, new media marketing specialists
  - Find me in my booth if you want to follow up
  - Presentation available at <http://modernearth.net/lern2012>

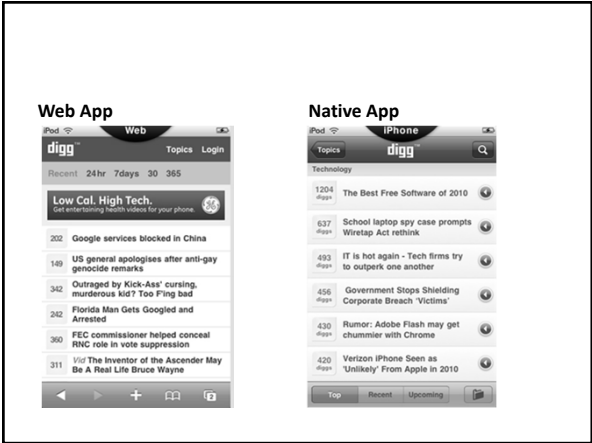
## The Rise of SMART PHONES





Smart Phone Applications  
**WEB APPS VS NATIVE APPS**

- |  |  |
|--|--|
| <p><b>Web App</b></p> <ul style="list-style-type: none"> <li>✓ Cloud based</li> <li>✓ Platform independent</li> <li>✓ A little slower</li> <li>✓ Less Fancy UI (atm)</li> <li>✓ No restrictions</li> <li>✓ Cheaper to build</li> </ul> | <p><b>Native App</b></p> <ul style="list-style-type: none"> <li>✓ Downloaded</li> <li>✓ Platform Specific Versions</li> <li>✓ Fast</li> <li>✓ Fancy UI Controls</li> <li>✓ App store restrictions</li> <li>✓ Expensive to build</li> </ul> |
|--|--|



Creating a  
**WEB APP**

<http://mippin.com>

Create HTML5 (web based) cross platform applications. Free to build, \$20 to deploy

The image shows a screenshot of the mippin website. At the top, it says 'mippin the mobile' and 'App Factory'. Below that, there's a banner that says 'CREATE YOUR APP IN FIVE MINUTES' with a 'CREATE YOUR APP' button. The website features images of various mobile devices and app icons.

Creating a

## NATIVE APP

<http://seattleclouds.com>

Create iOS/Android apps using building blocks.  
Pricing starts at \$99 plus \$9.99/month



Thank you!

[greatBIGnews.com](http://greatBIGnews.com)  
[modernearth.net](http://modernearth.net)



Presentation available at <http://modernearth.net/lern2012>



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Improving Quality

Fred Bayley  
Consultant  
LERN  
Forest City, NC



## 1. Instructor

One of the critical ways to maintain a high quality program is through your instructors. From their recruitment to their support, the instructors' quality has a direct influence on the customer's perception of your program. Instructors are your program's image. Therefore it is important to find and nurture the best instructors.



Look for instructors who fit your criteria as an “ideal instructor.” Know what qualities you're looking for. This helps you build job descriptions, recruiting techniques, training, and evaluations.

What qualities could you look for in your instructors?

- Helps insecure participants
- Flexible
- Communicate ideas at different skill levels
- Understands the subject but not necessarily mastery of the subject
- Good listener
- Respects the students privacy
- Does not punish students

Do not hire an instructor/presenter whose only reason for teaching is money. You are looking for people who enjoy working with the subject and working with people.

Most complaints about teachers are they are not a good presenters. Knowledge of the subject generates the least amount of complaints.

## 2. Independent Contractor

You can hire instructors as independent contractors.

They are not employees of your program. It is cheaper and requires less paperwork for your program to hire independent contractors. You are not responsible for paying deductions. They have control over the means and method of the instruction.



## Independent contractors

- Submit an invoice at the end of the program
- Have control over curriculum
- Have control over time

These are part of 20 points or questions in determining if someone is an independent contractor. LERN finds these are the major three points in determining if someone is an independent contractor. Ultimately it is up to your finance person or department to make this call. For more information consult LERN's Research Report 280, "Part-Time Teachers: Contractor vs. Employee Status"

### **3. Recruiting Instructors**

- a. Ads
- b. Ask Current instructors
- c. Ask staff
- d. Watch the news
- e. Talk to associated groups
- f. Hold an open house
- g. Interview
- h. Information packet

An instructor information packet can be available for potential instructors as they inquire about teaching for you. It can be picked up at any time or available electronically. The packet can include

- a. General information
- b. What is our program?
- c. Who participates?
- d. Who can be an instructor?
- e. How do you design a class?
- f. Writing your proposal: Titles, descriptions and biography
- g. Interviews
- h. What can we offer you as an instructor?

## Program Proposal Form

Program Title: \_\_\_\_\_ Instructor: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Address/City/State/ZIP: \_\_\_\_\_

Phone: Day: \_\_\_\_\_ Evening: \_\_\_\_\_

Please circle the number that can be given to students.

Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Program Description: Type or print clearly your description as you would like it to appear in the catalog. Include goals, topics, possible projects and class format. Write in "you" tense. XYZ reserves the right to edit.

Instructor Biography: \_\_\_\_\_

Schedule: Sun Mon Tues Wed Thur Fri Sat

Hours: from \_\_\_\_\_ to \_\_\_\_\_ am pm

Meet for: \_\_\_\_\_ weeks

Location: \_\_\_\_\_ or  XYZ to find space

Materials Fee (per person): \_\_\_\_\_

MAX. Program Size \_\_\_\_\_ MIN. Program Size \_\_\_\_\_

### 4. Training Instructors

- a. Orientation
- b. Subject or delivery based training
- c. Mentors/peers
- d. Lunchtime workshops
- e. Periodic workshops
- f. Newsletter
- g. Share best practices
- h. Contract
- i. Guideline book



A guideline book can create a common understanding of your program. Given out to new employees the contents can include:

- Publication information
- Contract
- Independent contractor status
- Materials fee
- Absences
- Emergencies
- Program packets
- Program cancellations
- Program space procedures
- Evaluation
- Weather procedures
- Equipment request forms
- Directions
- Supply lists

Use the number one reason people stay in their jobs: connections. Part of improving quality is through improving the quality of your relationships with your instructors. What can you do to improve the connections?

## 5. Evaluating Instructors

### Purpose

It is critical to be clear and specific about the evaluation's purpose.

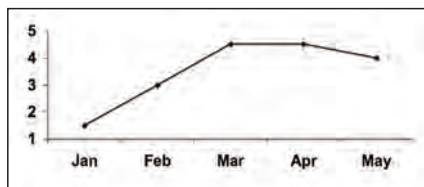
### Possible evaluation purposes

- a. To find out, overall, how courses are doing
- b. To weed out the poorest instructors
- c. To improve or help instructors
- d. To provide data on the quality of learning or participant satisfaction

### Ways To Evaluate Your Courses

- a. Participant questionnaire : Beginning, middle or end
- b. Participant complaints
- c. Lack of registrations and drop-out rate
- d. Sitting in on courses
- e. Calls to participants
- f. Liberal refund policy

Set up the evaluation forms using the Likert or 5 point scale. This provides a middle, neutral choice. In addition the positive or negative rating has some range. With only 5 points it does not give too much information.



As a general rule the more information you collect and more times you collect evaluation data, the better the information for the instructor. One set of data could be normal or could be a fluke. More sets of data will give you and the instructor better feedback.

Be sure to evaluate your evaluations. Ask yourself if it is giving you the data you need to make the best decisions.

### Model Course Evaluation

Teacher \_\_\_\_\_ Course \_\_\_\_\_

Participant Evaluation: Your evaluation of the teacher and class is very important. It will help us improve our program and serve you better. We review each evaluation so please consider each question carefully. Thank You.

Overall, were you satisfied with the course?  Yes  No

Circle your response to the following questions: 1 – poor, 3 – okay, 5 – excellent

The teacher:	Poor		Okay		Excellent
Understood the subject matter	1	2	3	4	5
Was well prepared for each session	1	2	3	4	5
Made the goals and objectives clear at the beginning of the class	1	2	3	4	5
Stimulated discussion and involvement within the group	1	2	3	4	5
Provided individual help when needed	1	2	3	4	5

Please comment:

What do you like about the class? \_\_\_\_\_

What improvements would you like to see in the class? \_\_\_\_\_

Do you have suggestion for future courses? \_\_\_\_\_

Additional comments or testimonial: \_\_\_\_\_

If a testimonial, may we use your name in our publicity?  Yes  No

Your name \_\_\_\_\_

Thank you for responding

Location: \_\_\_\_\_

## Creating Great Programs

1. Overall were you satisfied with the seminar?  Yes       No

2. How would you rate the following subjects?

	Poor		Okay		Excellent
New Growth Areas	1	2	3	4	5
Making Money	1	2	3	4	5
High Quality Instructors	1	2	3	4	5
Market Segments	1	2	3	4	5
Promotions That Work	1	2	3	4	5

3. Comments: \_\_\_\_\_

\_\_\_\_\_

4. Testimonial: \_\_\_\_\_

\_\_\_\_\_

5. May we use your name in our publicity?  Yes       No

## Model Workshop Evaluation

### Session Evaluation

We would appreciate your completion of an evaluation for the session. Please give the completed evaluation to the room monitor or any LERN staff member. Thank you!

Presenter \_\_\_\_\_

Session Title \_\_\_\_\_

Please rate this session

**Poor**

**Okay**

**Excellent**

1

2

3

4

5

Other comments: \_\_\_\_\_

Please check your institution type:

Association

Community/Tech College

Garden, Zoo, Museum

Health Care Organization

Other

Parks & Recreation

Public School

University/Private College

Please check one:

First time at LERN conference     Repeat Attendee

Your Name and Organization (optional) \_\_\_\_\_

**Model Conference Evaluation**

2021 LERN Convention

**LERN Evaluation Form**  
November 29 – 33, 2021

Forest City, NC

Please take a moment to evaluate this year’s convention and help us make next year’s even better.

1. Overall, were you satisfied with the conference?  Yes  No

2. What did you like the **most** about the convention? \_\_\_\_\_  
\_\_\_\_\_

3. What did you like the **least** about the convention? \_\_\_\_\_  
\_\_\_\_\_

4. Were there enough workshops?  Yes  No

5. Overall, were the quality of the sessions good?  Yes  No

6. Did you enjoy the roundtable discussion groups?  Yes  No

7. Was the hotel satisfactory?  Yes  No

If no, please explain \_\_\_\_\_

8. Other comments or testimonials you would like to make about this year’s convention \_\_\_\_\_  
\_\_\_\_\_

Please print your name and organization (optional) \_\_\_\_\_

May we use your testimonial in our publicity?  Yes  No

If yes, please sign your name \_\_\_\_\_

Regarding future conventions

Should there be more activities planned?  Yes  No

Please name one to three cities you would like to see a future LERN convention

\_\_\_\_\_

Please indicate your state or province \_\_\_\_\_

**Return this form to the registration desk or leave it in the room after the closing session.**

*Thank you!*



## 6. Model Programmer Course Evaluation

Course \_\_\_\_\_ Teacher \_\_\_\_\_

**Programmer Evaluation.** At the conclusion of the above course, the following information should be generated. A copy should be passed on to your supervisor, a copy should be put in the teacher's file and a copy should be put in the course file.

### A. Student Evaluations

1. Overall, were you satisfied with the course?  YES  NO
2. Fill in your response to the following questions:  
1-very poor, 2-needs improvement, 3-okay, 4-good, 5-excellent  
Understood the subject matter. -----  
Was well prepared for each session. -----  
Made the goals and objectives clear at course. -----  
Stimulated discussion and group involvement. -----  
Provided individual help when needed. -----
3. Comments. On a separate sheet of paper, list key comments on what participants liked about the course and improvements they suggested.
4. Testimonials. On a separate sheet of paper, list key testimonials along with the person's name. Make sure to hold their evaluation form on file because it has their signature approving the use of their testimonial.

### B. Teacher Evaluation

1. Overall, were you satisfied with the course?  YES  NO
2. Fill in your response to the following questions:  
1-very poor, 2-needs improvement, 3-okay, 4-good, 5-excellent  
Was the organization's staff helpful? -----  
Was your room prepared for your course? -----  
Did the learning environment meet your needs? -----  
Did the description clearly outline your course? -----  
Did your programmer give you feedback? -----
3. Comments. On a separate sheet of paper, list key comments on what teachers liked about the course and what improvements they suggested.
4. Testimonials. On separate paper, list key testimonials along with the teacher's name. Make sure to hold their evaluation form on file because it has their signature approving the use of their testimonial.

### C. Performance Analysis

1. Price of the Course -----
  2. Total Registrations -----
  3. Total Withdrawals -----
  4. Total Income (after withdrawals) -----
  5. Total Cost of Promotion -----
- If there was additional promotion beyond the catalog listing, attach a copy to this evaluation. To figure the promotional cost of a course in a catalog, divide the total cost of the catalog (desktop, printing, mail, etc.) by the number of courses.
6. Total Cost of Production (instructor fee, materials, space) -----
  7. Total Direct Costs (5 + 6) -----
  8. Operating Margin (4 - 5 + 6) -----

- D. Half-Life:** The number of weeks/days prior to the course when 50% of registrations were generated -----

**E. Participant Analysis Report.** On separate paper, breakdown the students' demographics: Age, Sex, Geography, and Education Level.

**F. Programmer Evaluation**

1. Overall, were you satisfied with the course? -----
2. Rate the teacher on the Likert Scale (1-5) -----
3. What action steps would you take to improve this course?

**E. Participant Analysis Report.** On separate paper, breakdown the students' demographics: Age, Sex, Geography, and Education Level.

**F. Programmer Evaluation**

1. Overall, were you satisfied with the course?  YES  NO
2. Rate the teacher on the Likert Scale (1-5) -----
3. What action steps would you take to improve this course?



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Increasing Staff Productivity

Greg Marsello  
Vice President  
LERN  
Tiverton, RI

## Increasing Staff Productivity



Washington, D.C. Conference 2012  
Greg Marsello



## Staff Productivity #1 Challenge



## Staff = Your Biggest Asset



**Staff Productivity =  
\$125,000**

**Income/FTE Staff  
 $\$500,000/4 = \$125,000$**



- The most successful units have staff productivity levels of \$150,000-\$250,000.
- Why?
  - Structure
  - Best Practices
  - Planning
  - Software

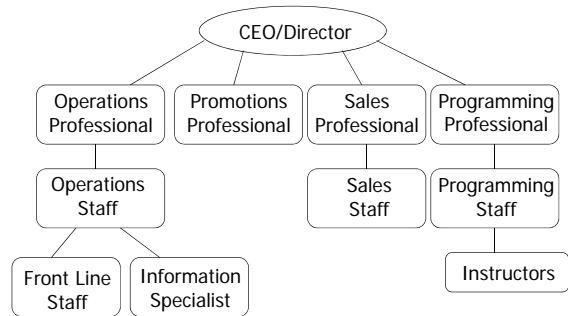
## Understanding the Cost of Staff Time

- 20% of total income to be spent on staffing
    - Example: Total income is \$1,000,000
      - \* then staffing budget is \$200,000
  - Each staffing position should generate 5 times the average staff salary
    - ( $5 \times 20\% = 100\%$ )
    - Example: Average staff salary is \$40,000
      - \* then each staffing position is valued at \$200,000.
- Thus, with \$1,000,000 in total income, there should be 5 staffing positions

## 20 Staff Productivity Strategies



## #1. Centralize Operations



## #2. Revenue Generators Generate Revenue

- 5 Staff: Director, 2 Programmers, 2 Operations
- Average Salary \$50,000. 5 X \$50,000 = \$250,000.
- Salaries at 25% = \$1,000,000 Sales
- Direct Costs on \$1,000,000 = 60% or \$600,000. Operating Margin = \$400,000.
- Administration Costs 35% or \$350,000 with \$250,000 Salaries.
- Programmers need to generate \$500,000 each or 10 X \$50,000.

## #3. Require Accountability

- From tasks to outcomes
- Rewrite job descriptions
- Be realistic, but set goals
- Provide tools and resources



## #4. Reduce Meetings, Use Virtual Office

- 10% or less
- Solving and planning, not reporting
- Reporting electronic



## #5. Streamline Catalog Production

- Timeline
- Data in, data out
- Template
- emsoftware
- [www.datatodesign.com](http://www.datatodesign.com)



### #6. Have an Information Specialist

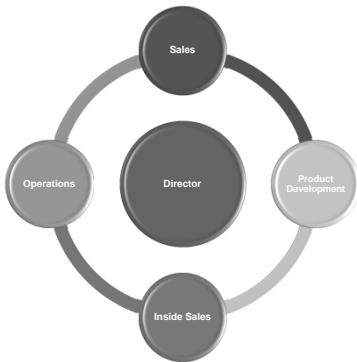


### #7. Support Telecommuting

- Keep revenue generators out of the office



### #8. Let Salespeople Sell



### #9. Contract Out

- Programming
- Brochure development
- Printing, mailing & distribution
- Web site
- Registration
- Data loading
- Proofing



### #10. Make Data-Driven Decisions

- Collect data
- Analyze data
- Make decisions



### #11. Have a Plan/Schedule

- Overall Goals
- Overall Finances & Benchmarks
- Division Finances, Benchmarks & Plan
- Term/Quarter Plan
- Promotion Strategies
- Timeline
- Staff Responsibilities

### #12. Think Peak Time

- Plan your day
- Not hours, outcomes



### #13. One New Direction/Initiative a Year

- 3 years
- 5-20% of revenue
- Operating margin
- Show me the names



### #14. Not Everyone

- Writes descriptions
- Generates reports
- Updates web site
- Calls on cancelled classes



### #15. Staff Training

- Fill gaps
- Personal USP
- Quarterly
- 5%



### #16. Cut the Dogs!

- Courses
- Instructors
- Clients
- Promotion methods
- Staff
- Paperwork
- Tools



### #17. Director as Buffer

- Central administration
- Meetings
- Roadblocks



## #18. Recognize Winners

- Team
- Individuals
- Internal/external



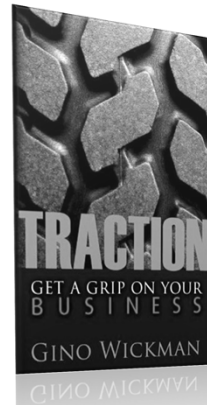
## #19. You Can't Be Everything to Everyone

- 80/20 Rule
- 7 segments



## #20. Let Software Do the Work

- Industry-based
- Best practices
- Web-based
- Flexibility
- Upgrades and features
- Customer service



THANK YOU!



GREG MARSELLO  
[www.lern.org](http://www.lern.org)





## LIFELONG LEARNING 2012

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### 10 Strategies to Increase Income in 2013

Julia King Tamang  
Consultant  
LERN  
Portland, OR

**10 Strategies to Increase Income in 2013**

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### Beyond Email and Facebook

Jennifer Selke  
University of California-Berkeley  
Berkeley, CA

# **Beyond Email and Facebook**

mobile and web applications of productive workers

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Jennifer H. Selke, Ph.D.

[www.jennselke.com](http://www.jennselke.com)



## LIFELONG LEARNING 2012

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### Creating Winning Initiatives

Greg Marsello  
Vice President  
LERN  
Tiverton, RI

## Creating Winning Initiatives

Washington, D.C. Conference 2012

Greg Marsello



### High-Dollar vs. Low-Dollar Initiatives

- Low-dollar/participation courses/events are not cost effective to do much needs assessment. Follow these guidelines:
  - Accept normal cancellation or failure rate, based on historical experience. *15% overall. 30-50% new.*
  - Look at a larger group or division. *Think market segments or best divisions.*
  - Do quick surveys. *Ask best customers. Short, quick.*
  - Just do it.

2

### High-Dollar vs. Low-Dollar Initiatives

- Spend time doing research on high-dollar/participation initiatives.



3

### New Initiative Types

1. New Product Area – Health, Cooking
2. New Market Segment – Generation Y, Executives
3. New Delivery Method – Camps, Conferences

4

### Develop and Follow New Initiative Guidelines

- Guideline A
  - Initiative should have an expected life of 3 years or more.
- Guideline B
  - Initiative should generate \$100,000 or 5-10% of your total income by year 3.

5

- Guideline C
  - Initiative should generate an “acceptable” operating margin and net by year 3.
    - Cover direct costs in year 1.
    - Cover direct costs plus more in year 2.
    - Make operating margin goal in year 3.

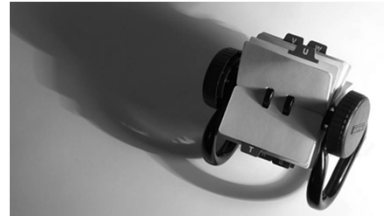
Income	\$ _____	100%
Promotion	\$ _____	10 – 15%
Production	\$ _____	45 – 50%
Direct Costs	\$ _____	60%
Operating Margin	\$ _____	40%
Administration	\$ _____	35%
Net	\$ _____	5%

6

- Guideline C example
  - A. Year 3 Goal = \$100,000 Revenue, \$50,000 OM, and \$5,000 Net
  - B. Year 1: Direct Costs are \$25,000 so Revenue is \$25,000
  - C. Year 2: Direct Costs are \$40,000 so Revenue is \$70,000
  - D. Year 3: Direct Costs are \$50,000 so Revenue is \$100,000

7

- Guideline D
  - Initiative should have 1,000-10,000 names available or an "acceptable" market potential.

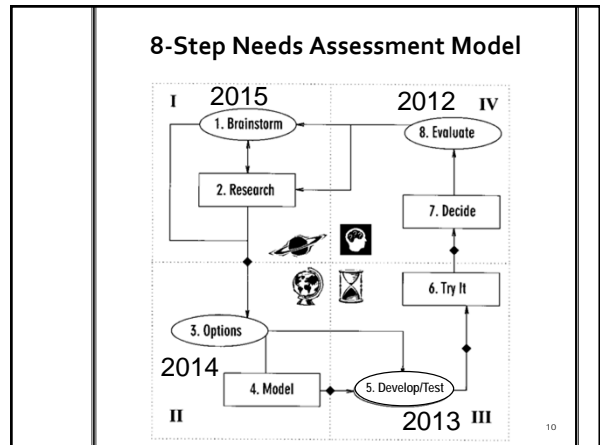


8

- Guideline E



9



10

- ### 2013 Example
- A. Deciding on and evaluating 2012 initiative
  - B. Developing, testing, and rolling out 2013 initiative
  - C. Selecting top 3 2014 initiatives. Modeling top 3 and picking top 1.
  - D. Brainstorm and research 2015 initiatives.

11

- ### Stage One: Brainstorm
- Brainstorm lots of ideas, keep 10 or more active at any given time.
  - Use participants, business books, staff, advisory boards, and yourself to come up with ideas.
  - Don't negate or pass negative judgments on ideas.
  - All ideas are good. Not all ideas are feasible, workable, or marketable.
  - Don't become attached to an idea. Don't give an idea ownership (e.g. Pat's idea).

12

### Stage Two: Research

- Research lots of ideas at any given time, at least 10.
- Use low cost or no cost techniques in your research.
- Listen to your customers.
- Look deep, and in many ways, at your own participation data.
- Analyze each one of your three closest competitors.
- Explore the total potential audience or "universe" for each new initiative idea.

13

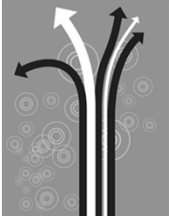
### Stage Three: Choose Options

- Use an advisory board to help you narrow down your best new initiative ideas.
- Recruit at least half of your advisory board members from your best customers.
- You control the advisory board, you set the agenda, they help you.
- Use your small group to help improve your new initiative idea.

14

### Stage Three: Choose Options

- Survey your small group often to help refine and improve your new initiative idea.
- The advisory group does not make decisions or the final choice for a new initiative idea. The final decision is made by your audience when you try it.



15

### Stage Four: Model

- If your new initiative idea can work on paper, it can work in real life.
- If your new initiative idea cannot work on paper, it cannot work in real life.
- The numbers rarely fall into place easily, so do some adjusting and "what if...".
- This just takes a few minutes, and involves only one sheet of paper.
- Ignore this stage, and you put your new initiative idea in peril.

16

### Stage Five: Develop/Test

- Start developing the product, market segment, delivery method.
- Use experts. You cannot be the subject matter expert.
- Survey your best customers only.
- Survey for the right questions.
- Always be surveying your customers.
- Build enough to make your efforts an initiative.

17

### Stage Six: Try It

- Test one new initiative idea at a time to give it your full attention and resources.
- Schedule the first offering shortly after your final survey for the new initiative idea.
- Estimate income conservatively, budget to break even.
- Lower the risk, test only one new variable.
- Promote early, and promote it heavily.

18



	<p><b>Stage Seven: Decide</b></p> <ul style="list-style-type: none"> <li>▪ Don't spend a lot of time, but do some hard thinking.</li> <li>▪ Don't cut a new initiative that will eventually be a winner.</li> <li>▪ Break even is good enough for the first offering.</li> <li>▪ If the new initiative can double or triple its enrollments, go with it.</li> <li>▪ Don't be afraid to kill a new initiative idea if the market was not ready for it.</li> </ul> <p style="text-align: right;">19</p>	
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	<p><b>Stage Eight: Evaluate</b></p> <ul style="list-style-type: none"> <li>▪ Your first offerings should be the 'worst' quality wise and financially.</li> <li>▪ Work on improving the promotion and marketing of a new initiative idea.</li> <li>▪ Look at streamlining and improving your production and quality.</li> <li>▪ Explore ways to conduct the new initiative more efficiently in terms of staff resources.</li> <li>▪ Keep improving. Go through the cycle again, brainstorming and researching more ways to improve the initiative and boost its success even further.</li> </ul> <p style="text-align: right;">20</p>	
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	<p><b>THANK YOU!</b></p>  <p><b>GREG MARSELLO</b></p> <p><u><a href="http://www.lern.org">www.lern.org</a></u></p>	
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### Customer Retention: Key to Growth

Fred Bayley  
Consultant  
LERN  
Forest City, NC

Program growth comes from the retention of past participants. It does not come from the addition of new participants. Our programs grow best from their successes.

### 1. Retention

#### A. Who Attends Next Time

- Current customers
- Customers with the same demographics as current customers
- Customers who inquire

#### B. Lifetime Value Formula

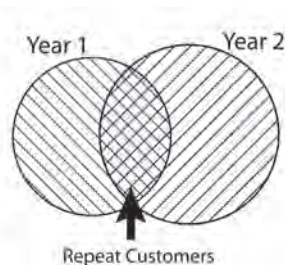
One participant is worth more than one registration. They generate additional income through their lifetime relationship with you. This Lifetime Value is the dollars generated by an individual customer over a lifetime (length of time with your program).

##### LTV Formula

$$\frac{1}{(1 - \text{repeat rate})} \times \text{average activity fee}$$

#### C. Repeat Rate

A customer repeats if they attend a class in two consecutive years. It is the number of people in your last session (or year) that repeat in your current session (or year) divided by total number of people last session (or year).



$$\text{Repeat Rate} = \text{Repeat Customers} \div \text{Year 1 Customers}$$

Target Repeat Rate 30-50%

## D. Increasing Repeat Rate

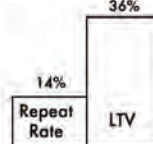
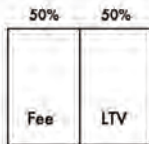
An increase in your program's repeat rate means an even bigger increase in your program's income and profitability.

Example:

Repeat Rate	Average Fee	LTV
66%	\$100	\$294

Repeat Rate	Average Fee	LTV
66%	\$100	\$294
66%	\$150	\$441

Repeat Rate	Average Fee	LTV
66%	\$100	\$294
75%	\$100	\$400



## E. Why customers don't return

The top three reasons why customers do not return

1. Quality
2. Service
3. Lack of New Programs

## F. Referrals

Repeat customers bring in referrals or more customers. This takes advantage of word-of-mouth promotion and generates additional income.

## 2. Customers

### A. Participants as Customers

1. They want their money's worth
2. They want quality and service
3. They purchase because of emotional needs as well as for other reasons
4. They evaluate their purchases critically

### B. Best Customers

Your best customers generate 80% of your income.

Best customers are 20-25% of all customers. In lifelong learning, we use

1. Recency - How recently have they been involved
2. Monetary value or the amount spent over their lifetime with your program

If you don't know your best customers, survey them for demographic data.

- Community programs: Birth year
- Continuing Professional Education: Occupational specialty

For your best customers

1. Tell them they are a best customer
2. Add value without additional cost to you

### **C. 5 Stages of Participant Attachment**

1. Awareness  
“I know you exist.”
2. Identity  
“You have something for me.”
3. Relationship  
“I think that the benefits will outweigh the risks. I register.”
4. Community  
“The benefits do outweigh the risks. I like the information and people. Let me try again.”
5. Advocacy  
“You guys are the greatest. I am going to tell all of my friends!!”

## **3. Customer Service**

### **A. Process**

1. Handling Complaints
  - Rejoice, because those who do not complain never come back.
  - Complaints handled successfully motivate customers to return.
2. Night Time Staff  
Night time staff are present and handle certain tasks like responding to registrations.
3. Email  
Collect email addresses so you can follow up and promote future courses. Make sure you respond to emails.
4. Inquiry Follow-Up  
Follow up on inquiries three times. They are very likely to register.
5. Memberships  
Memberships bring repeat business.
6. Voice Mail  
Voice mail needs the best information and options.

7. Frontline Staff Report

Frequent summary reports from frontline staff will keep you focused on the important tasks.

8. 24 Hours, 7 Days a Week

Registration is always available in some format

9. 5+ registration options

5 or more registration options should be available.

10. Say “Thank You” and “You’re Welcome”

**B. Customer Targets**

What are your response times to

- Rings to answer the telephone
- Respond to walk-in customer
- Return voice mail
- Return email
- Confirmation of registration
- Refund
- Inquiry response
- Cancellations

**C. Customer Expectations**

1. Refunds: Offer vouchers first

- You keep the money
- Most customers will not use the vouchers

2. Special touch

What is the special touch you can add to the customer’s experience?

3. Sunset Rule

Following up on an inquiry before the end of the day will increase registrations than simply following up within 24 hours.

**D. Information**

1. Information Specialist

One person is dedicated to handling customer inquiries.

2. Advising

Help the customer solve their problems with your programs. Using an advising role.

### 3. Teacher Lists & Info

Keep a list of information from instructors including supplies needed. Place this information on the web.

### 4. FAQ's

What are the FAQ's? What are the answers?

### 5. Evaluation Form Book

Keep student evaluations available for new student review.

### 6. Explaining Your Program

Every staff member should be able to answer these three questions

- What do you offer?
- Who comes to your programs?
- What are you about?



## LIFELONG LEARNING 2012

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### Fatal Leadership Errors

Henry Findlay  
Tuskegee University  
Tuskegee, AL



## Fatal Leadership Errors

LERN Annual Conference

Washington, DC

November 15-18, 2012

Henry J. Findlay, Leadership Researcher  
Tuskegee, Alabama

[findlay@mytu.tuskegee.edu](mailto:findlay@mytu.tuskegee.edu)  
334-724-4316



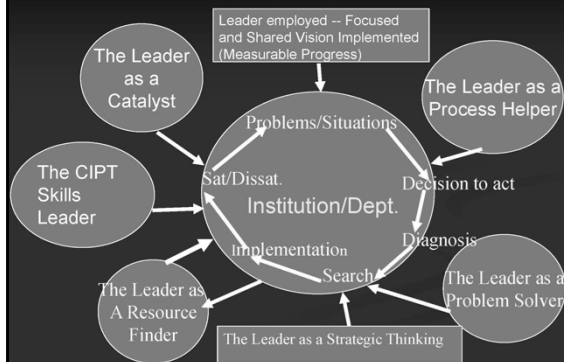
## Successful Leadership

“Success is ultimately realized by people who make more right choices and recover quickly from their bad choices.”

-- David Cottrell (2005) -- 12 Choices That Lead to Your Success



## Normal Paradigmatic Leadership Model



## The Starting Point for Leadership Errors

Too often, individuals without any formal leadership training are appointed to administrative/leadership positions

A lack of understanding of leadership vs management -- often leads to serious blunders in decision-making process



## The Starting Point for Leadership Errors

When there is a lack of clear leadership philosophy to determine:

- What you believe about people and how you interact with people
- How you perceive yourself
- How you react to situations --ultimately, your leadership effectiveness



## The Starting Point for Leadership Errors

When leaders lack:

- **A significant purpose of leadership** What's your purpose? Are you passionate about your purpose? (**professional applause**) Is it clear?
- **A compelling vision:** Where are you going? What will it look like when you get there? Why should others support it?



### The Starting Point for Leadership Errors

When a leader does not possess :

- Inspiring Values

- What are your core values? What guides your actions? What guides your decision making?

- Guiding Principles

- What are your guiding principles?



### The Starting Point for Leadership Errors

- When a leader does not understand the relationship between governance and administration

- Governance -- way issues affecting the entire institution or one or more components are decided

- the structure and processes, both formal and informal, of decision-making groups and the relationships between and among these groups and individuals



### The Starting Point for Leadership Errors

When a leader does not understand the relationship between governance and administration (Contd.)

- What distinguishes governance from administrative decisions:

- Governance establishes policies

- what happens later is administration



### The Starting Point for Leadership Errors

When leaders are not competent and hire team members below the competency line:

- Competent leaders are needed to facilitate governance, make wise administrative decisions, and manage the future



### The Starting Point for Leadership Errors

When leaders do not have the requisite leadership skills and see leadership/administrative positions as professional or social applause:

- “Good leaders are not developed overnight. They can’t be made in a microwave; they must be simmered in a crock-pot”

--- John C. Maxwell (2000)



### The Starting Point for Leadership Errors

When leaders do not:

- ✓ Have the right people in the right place -- hire the best people

NB: Competent inner circle members = organizational effectiveness



## The Starting Point for Leadership Errors

When these people are not in the inner circle?

- Influential
- Possess social capital
- Empowering
- Resourceful
- Intuitive
- Responsible
- Competent
- Loyal
- Energetic
- Ethical



## Practice the Ethical Test in Decision Making

The Ethical Test – ask yourself these questions before you make a decision:

1. Is it legal?
2. Does it comply with rules and guidelines?
3. Is it in line with what I believe?
4. Will I feel guilty after doing it?
5. Does it match my stated commitments (my words)?
6. Would I do it to those closest to me (family and friends)?
7. Would I be perfectly okay with someone doing the same thing to me?
8. Would the most ethical person I know do it?



## The Starting Point for Leadership Errors Lack of Knowledge of Your Team

### The Healthy Team

- ✓ Optimism
- ✓ Focus on unification
- ✓ We are in this together
- ✓ Solve problems together
- ✓ Reconciliation
- ✓ Consensus building
- ✓ Collaboration
- ✓ Win-win solutions
- ✓ Tolerance and respect
- ✓ Politics of substance
- ✓ Diversity of thoughts
- ✓ Problem solvers
- ✓ Good listeners
- ✓ Healers

### Unhealthy Team

- Cynicism
- Focus on division
- Divided
- At war with solutions
- Hold grudges
- Polarization
- Confrontation
- Win-lose solutions
- Mean-spirited
- Politics of personality
- Apathetic team members
- Blockers and blamers
- Attackers
- Dividers



## The Starting Point for Leadership Errors

### When Leaders do not understand the Leadership Efficiency Line

In every organization, leaders are expected to perform at an optimal level of efficiency and at the same time influence others to perform at or above the leadership efficiency line



## The Starting Point for Leadership Errors

When leaders do not understand the Leadership Efficiency Line (contd.)

Def: The leadership efficiency line is that point in an organization where employees' talents, skills, competence, optimism, enthusiasm, work ethic, motivation, are at their highest level and productivity is abundant.



## Competent Leadership

When leaders and organizational members are performing below the efficiency line, the organization tends to show signs of disequilibrium and leaders are likely to succumb to suicidal leadership.



## Suicidal Leadership

### Suicidal Leadership Premise:

Suicidal leadership (SL) -- leaders in business, education, and government sometimes become victims of their own successes or failures, resulting in their inability to achieve measurable progress in pursuit of organizational effectiveness.

--Findlay & Findlay 2006



## Suicidal Leadership Theory

Suicidal leadership theory assumes that if leaders engage in certain negative behaviors such as controlling, threatening, coercing, micro-managing, and nano-managing employees, and/or uses devious leadership strategies, they will eventually fail.

--Findlay & Findlay 2006



## Suicidal Leadership

### Suicidal leadership defined:

➤ (SL) occurs when fatal leadership errors are made that deplete the leaders' effectiveness and eventually culminate in their termination from the position. SL includes five sequential, downward, spiraling, fatal errors (DSFE) which contribute to suicidal leadership.

--Findlay & Findlay 2006



## Suicidal Leadership

SL errors and/or behaviors occur in phases and include:

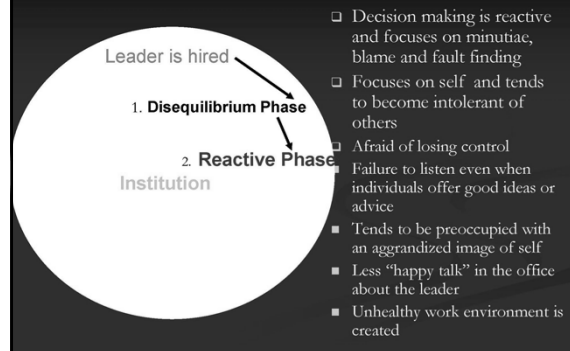
1. Disequilibrium phase
2. Reactive phase
3. Impulsive phase
4. Weakened phase
5. Neurotic phase
6. Termination phase or SL



### The Disequilibrium Phase of Suicidal Leadership



### The Reactive Phase of Suicidal Leadership



### Impulsive Phase Of Suicidal Leadership

- Decisions are often unpredictable and confusing
- Make many unplanned changes -- usually haphazard, annoying, and threatening to employees' careers
- Working environment becomes psychologically taxing as employees feel powerlessness
- Much quid pro quo
- Assertions of authority: *'I am in charge; don't you know that I am the ...'*

### The Weakened Phase of Suicidal Leadership

- Leader becomes vulnerable
- Very little work is accomplished
- Sometimes employees begin covertly to form coalitions to unseat the leader
- Tends to distort facts, and compromise the judgment needed to make informed decisions
- Ethical lapses
- Negatives about the leader spread -- institution, the community, professional organizations

### The Neurotic Phase of Suicidal Leadership

- High degree of moodiness
- Passive-aggressiveness
- Apprehensive of everyone (mistrust)
- Narcissistic behaviors
- Shrinking of the inner circle
- Low morale permeates the institution
- Some of these leaders studied actually experienced a nervous breakdown

### The Suicidal Leadership Phase

- Important duties are neglected
- Displays behaviors that are incongruent with the leadership position
- A culture is created where the inner circle and other leaders start to show signs of neurotic behaviors, too
- Sometimes, the community begin to call for the leader's dismissal
- Finally, the leader is terminated

### What Happens after Suicidal Leadership?

- Depending on the nature of SL, the leader may enter the Rest from Leadership (RFL) where no one will employ him/her in another leadership position, or ...

### What Happens after SL

- The SL leader can proceed to the rebirth phase where he/she will be employed by another institution
- He/she may go through another SL, or learn from previous missteps -- make measurable progress at the new place of employment

## The Half-life of Leadership

- There is no definite time frame for each phase of SL
- SL depends on the attitudes, dispositions, knowledge, skills and abilities of the individuals to recognize the flaws in their leadership ability and take action to remedy the situation



## The Half-life of Leadership

- Half-life of leadership – the time it takes for leaders to remain visionary, focused and effective without succumbing to burnout (8-10 years) and SL



## Summary Suicidal Leadership

The heart of suicidal leadership is the leader's ineffectiveness caused by inappropriate dispositions and attitudes, and lack of knowledge and skills, which result in his/her inability to achieve organizational goals



## How to Prevent Leadership Errors/SL

1. Have a passion for leadership and not just the title
2. Remember a title without significant achievements is infinitesimal --amounts to nothing
3. Share the vision, build trust, inspire commitment
4. Appoint a competent team to the inner circle
5. Hire people at or above the competency line
6. Engage in self-development (reenergize, retool, etc.)
7. Practice emotional intelligence



## How to Prevent Leadership Errors/SL (Contd.)

8. Practice emotional intelligence in dealing with people
9. Remember you are not the sole repository of good ideas
10. Invest in wise choices and accept responsibility for your actions regardless of the outcomes
11. Create a culture of integrity and ethical leadership
12. Be optimistic and enthusiastic instead of whining and blaming others





## LIFELONG LEARNING 2012

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# Make Your Program Essential

Julie Coates  
Vice President  
LERN  
River Falls, WI

**Economic Impact Worksheet for Your Program:  
Based on Case Study from University of Alabama in Birmingham**

**I. Local business volume**

**A. Non-personnel expenditures for the fiscal year**

1. Numbers you need: your non-personnel budget total \_\_\_\_\_
2. 85% of your non-personnel budget (the percentage of those dollars spent in your local area) \_\_\_\_\_

**B. Personnel expenditures for the fiscal year**

3. Your total budget for staff wages and benefits (excluding instructors) \_\_\_\_\_
4. Your total wage and benefit budget less withholding = Disposable income \_\_\_\_\_

**C. Expenditures by Visitors from outside the area (Seminars & Conferences, Special Events, etc.)**

5. Average amount spent per day x the average number of days in the community \_\_\_\_\_

**D. Expenditures by non-credit/enrichment class attended**

6. Number of participants per year x the average number of sessions per year x average amount (non-fee) spent per session attended (vending, meals, parking supplies, etc) \_\_\_\_\_

7. Add 2 + 4 + 5 + 6 to get the direct business impact on your community.  
Multiply the sum of 2, 4, 5 and 6 x 3 to determine local business volume generated by your program. \_\_\_\_\_

**II. Cost Savings to Business and Industry**

8. Determine the number of people who regularly participate in fitness related programs (yoga, aerobics, belly dance, ballroom dance, etc.) in your program \_\_\_\_\_.
9. Multiply the number of participants by \$225 to determine savings in health care costs to local employers. \_\_\_\_\_

**III. Measure the productivity increases facilitated by your program**

10. Determine the average number of professionals who participate in your training programs \_\_\_\_\_



11. Determine the average salary for the professionals attending your training programs \_\_\_\_\_
12. Multiply the average salary of professional participants (10) x the number of participants (9) x .04 for a conservative estimate of productivity increase. (Studies have found that greater increases can occur). \_\_\_\_\_
13. Determine the number of participants you serve in non-credit business classes. \_\_\_\_\_
14. Find the average salary of these participants. \_\_\_\_\_
15. Multiply the average salary of non-credit business class attendees (13) x the number of participants (12) x .04 for a conservative estimate of productivity increase. \_\_\_\_\_
16. Add the numbers you got in items 11 and 14 to determine the total dollars saved in increased productivity. \_\_\_\_\_

**IV. Total Cost Savings to Business and Industry**

17. Add items 8 and 15 to determine the total cost savings in health care and productivity to businesses and industry. \_\_\_\_\_

**V. Jobs created**

18. Determine your total non-personnel expense budget: \_\_\_\_\_
19. Multiply your non-personnel expense budget x .45 (based on percentage of total expenditures that are local) \_\_\_\_\_
20. Multiply the number in 18 x .00008 to determine how many jobs, in addition to your staff, are created by your organization.

**VI. Total personal income to regional residents**

21. Total salary for instructors x 93.9 (the percent spent in the local area) \_\_\_\_\_

**VII. Total expansion of local credit base**

22. Your total budget x .24 \_\_\_\_\_ (primary credit base expansion)
23. Number in item 22 x 8.1 \_\_\_\_\_ (secondary credit base expansion)
24. Add 22 + 23 for total credit base expansion \_\_\_\_\_

**VIII. Total Economic Impact**

**Add items 7 + 17 + 21 + 24 to determine total economic impact of your program \_\_\_\_\_**



## Gaining Voter Support

How increasing participation from Baby Boomers can win critical votes for your organization's next referendum

### Conditions

The following conditions apply to this report:

1. The information available to you must remain within your own organization. You may not share it with individuals or other entities outside of your own organizational setting.
2. You should not directly contact school officials or school districts identified in this report. If you have questions, please contact LERN.

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# Gaining Voter Support

## Overview:

This report details the following- -

- ❖ The evidence that community education participants vote in significantly higher percentages for overall school district funding than the general public.
- ❖ Why programs should be targeting Baby Boomers.
- ❖ A strategy for how to improve referendum voting support for community education programs.

## Why target Baby Boomers?

What is new since 2004 is that Baby Boomers have demonstrated conclusively that they:

- Do not consider themselves to be “seniors” or golden agers.
- Have significantly different learning interests from the World War II generation (age 76 and older) and Silent Generation (age 61-75).
- Will not respond in significant numbers to programs aimed at adults designated as seniors.
- Are now decreasingly responsive to general community education brochures that mix Boomer courses with those oriented to Gen X, families, working people and those in the younger generations. Thus, it will become increasingly difficult to reach substantial numbers of Baby Boomers with a general community education brochure.
- Will respond to courses, promotions and language specific to Baby Boomers.

Millions of Baby Boomers are now over age 50 and are now voting in much larger percentages than adults under the age of 50.

Providing services for senior citizens (those ages 61 and up) is still important and valid. But as the numbers of people in these generations decline, the voting public of people ages 50 and up will increasingly become dominated by Baby Boomers until around 2030.

Thus, obtaining the support of Baby Boomer voters is increasingly important for public organizations.

# The Role of Community Education in passing School District funding referendums

## **Purpose of the Study**

The purpose of the study was to demonstrate that participants in community education programs vote in significantly higher numbers for school district referendum (bond, mill levy) issues, even when those school district issues have little or nothing to do with community education.

## **Implications**

The implications for school districts are enormous. It means that an important if not central value of community education is in generating direct and concrete support, as expressed as votes, for larger school district funding.

## **Why community education participant support is important**

As many school officials understand, some 74% of voters in their district have no children in school. Gaining support from voters who do not have children in school is essential to passing school district funding requests.

Furthermore, adults most likely to vote are adults aged 50 and older. So even while parents of children in school are likely to be supportive of school district funding issues, parents of children in school are often younger and possibly less likely to vote on such issues. Even with parents voting, school district funding is still dependent on the votes of adults without children in school.

## **Community education is unique**

Community education in public schools provides a unique benefit to the school district in that community education is perhaps the only way for adults without children to experience and benefit from the services of the school district. By providing classes, courses and other activities for adults without children in the community, community education delivers a unique service that engenders greater support from these adults for larger school funding issues.

## **Documenting voter support**

Anecdotal evidence has been gathered and talked about for years as to the importance of community education in generating positive voter support for school funding. However, this is the first statistical study to attempt to quantify and document that community education participants vote more favorably than the general public at large in school district funding referendums.

## **Study**

The study asked a number of Community Education participants how they voted for the most recent school district funding issue. A common term for this approach is “exit polling,” a valid scientific research tool that is used commonly after elections of all types

to examine who voted how. The results of the voters' responses were then compared with the percentage of voters overall voting for the school district funding.

It did not matter whether the referendum passed or not. In either case, we compared the two percentages (how community education participants voted versus how the general public voted overall).

### **Procedure**

A random list of participants from the community education program was sent to the Learning Resources Network, LERN, a national association in lifelong learning serving community education programs across the United States and in 20 other countries.

A letter and post card reply card was sent to the community education participants. The survey consisted of one question for each referendum ballot on the school district referendum.

“In the (name of school district) referendum on (date),

Did you vote: \_\_\_ yes \_\_\_ no \_\_\_ did not vote

The responses were anonymous and there was no way (nor desire) of tracking an individual's reply. Postage was paid. The study was privately funded by LERN and did not involve any taxpayer funds.

### **Why this approach is valid**

The reason why the comparison of the two voting percentages is a valid comparison is that all other factors are equal. That is, other factors such as the economy, local district politics, state funding and other issues cannot be attributed for the variance.

### **Why participants vote more favorably**

The reason why community education participants vote more favorably for school district funding than the general public is because they are served by the community education program.

Other reasons can be discounted.

- ❖ There is no evidence that people participate in community education ‘because’ they support the schools. No study or even opinion poll has even hinted at this cause-effect.
- ❖ Attitude, or psychographics, is far less important in general than demographics and behavior, according to direct marketing experts.
- ❖ Income level, age or other factors do not play a factor. The 1995 Dilman study at Washington State University, for example, demonstrated that people of all ages, income levels, and ethnic background value continuing education and lifelong learning.

### **Conclusion**

The study indicates that there is conclusive evidence that community education participants vote in a significantly higher numbers in favor of school district funding issues, and that the votes of community education participants play a critical role in the passage of school district referendums.

Community education programs can be operated on a break-even basis if the programs follow LERN's guidelines for financially self-sufficient operations. Thus community

education programs can and do provide votes for local school districts that translate into millions of dollars of funding.

**Recommendations**

1. School districts without a community education program should initiate one.
2. School districts with a community education program should continue to maintain and support the program.
3. Community education programs should not engage in specific vote advocacy.
4. School superintendents should work with community education directors to target by ward/precinct and demographics areas and types of voters for community education classes and services, thus being more strategic in developing voter support.
5. Classes and courses for adults over age 50 should be strengthened and expanded. You are able to obtain information and consulting from LERN on how to target baby boomers, those adults age 50 – 60, who are now joining senior citizens as a critical voter support audience for public schools.

LERN is the foremost authority on how to accomplish these objectives and is available to any school district, superintendent, or community education program with information, consulting, and management services.

**Survey Results**

Austin Public School District 492 November 4, 2003, Referendum

Austin, Minnesota

Laura Kuehl, Austin Community Education

The survey was mailed to 267 participants in the Austin community education program. The number of responses was 66, or a 25% response rate. As is noted later, the response rate is statistically valid and significant.

Community education participants responding voted as follows:

Yes	47	78%	(of those voting)
No	13	22%	(of those voting)
Did not vote	6	91%	(percentage of respondents voting)

Overall voters in the referendum voted as follows:

Yes	3,152	57%
No	2,390	
<b>Total</b>	<b>5,542</b>	

## **Analysis**

Community education participants voted in significantly higher numbers in favor of the Austin referendum. The difference was 21% (78% to 57%).

## **Statistical Validity**

A commonly used statistical variation formula provided to us by statistics professor Dr. John Boyer of Kansas State University was used to determine the extent to which the results are valid. The formula is  $\pm$  or  $-$  twice the square root of  $p(p-1)$  divided by  $n$ , where  $p$  is the percentage voting in favor and  $n$  is the total number of respondents.

Using the formula, there is a possible error of 11% in the results. That means the worst possible difference would be 67% to 57%. There is an equal possibility that the actual statistical difference is 88% to 57%. Thus, the survey results are statistically valid.

## **Did community education win the referendum?**

Some 2,000 adults of voting age participate in the community education program. Using the survey results, it can be estimated that 1,800 of them voted, and provided 1,404 yes votes and 396 no votes. Thus, community education participants provided 1,008 more yes than no votes. The overall referendum passed by 762 votes. The case could be made that community education votes won the referendum.

## **What if... no community education?**

Without that 21% differential in support provided by community education participants, the votes would have been 2,774 yes and 2,768 - a statistical draw which could have been a defeat for the referendum.

## **Other survey responses**

LERN also surveyed community education participants in other school districts, with similar results. Taken together, the cumulative numbers also provide a much smaller error range.

## **Conclusions**

The survey results provide sufficient documentation to support the importance of the community education program in delivering votes for school district referendums.

To disregard the role of community education is potentially disastrous. The results also indicate that the school district could further enhance its overall community support by strategically growing the community education program by recruiting more participants in certain precincts/wards (or demographic groups) where increased voter support is desired.

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## Survey Results

Forest Lake Public School District November 4, 2003, Referendums  
Forest Lake, Minnesota Dan Poepard, Forest Lake Community Education

The survey was mailed to 283 participants in the Forest Lake Community Education program.

The number of responses was 53, or a 19% response rate. As is noted later, the response rate is statistically valid and significant.

### Community education participants responding voted as follows.

Operating levy referendum:		
Yes	40	82% (of those voting)
No	9	18% (of those voting)
Did not vote	4	92% (percentage of respondents voting)

Technology referendum:		
Yes	34	69%
No	15	31%
Did not vote	4	92%

### Overall voters in the referendum voted as follows.

Operating levy referendum:		
Yes	3,662	42%
No	5,121	58%
<b>Total</b>	<b>8,783</b>	

Technology referendum:		
Yes	3,140	38%
No	5,179	62%
<b>Total</b>	<b>8,319</b>	

## Analysis

Community education participants voted in significantly higher numbers in favor of the Forest Lake referendum. The difference was 40% on the Operating levy (82% to 42%) and 31% on the Technology levy (69% to 38%).



### **Statistical Validity**

A commonly used statistical variation formula provided to us by statistics professor Dr. John Boyer of Kansas State University was used to determine the extent to which the results are valid. The formula is  $\pm$  twice the square root of  $p(p-1)$  divided by  $n$ , where  $p$  is the percentage voting in favor and  $n$  is the total number of respondents.

Using the formula, there is a possible error of 11% in the Operating Levy results, and 13% in the Technology referendum. That means the worst possible difference would be 71% to 42% in the Operating levy referendum, and 56% to 38% in the Technology referendum. There is an equal possibility that the actual statistical difference is actually higher or better.

Thus, the survey results are statistically valid.

### **Could community education win future referendums?**

Even in the worst case scenario, if all of the voting adults in Forest Lake had been participants in the community education program, both referendums would have passed.

A switch in votes of just 729 for the Operating levy referendum and only 1,020 for the Technology referendum would have resulted in the referendums passing.

### **What if... no community education**

Without that 40% and 31% differential in support provided by community education participants, the votes would have been even worse.

### **Other survey responses**

LERN also surveyed community education participants in other school districts, with similar results. There were 208 responses from 751 mailings, or a 28% response rate. Overall, some 79% of community education participants voted Yes, and 21% No, with a 7.3% error or statistical variance range. Taken together, the cumulative numbers also support the statistical validity of the study. Taken together, the cumulative numbers also provide a much smaller error range.

### **Conclusions**

The survey results provide sufficient documentation to support the importance of the community education program in delivering votes for school district referendums. To disregard the role of community education is potentially disastrous.

The results also indicate that the school district could further enhance its overall community support by strategically growing the community education program by recruiting more participants in certain precincts/wards (or demographic groups) where increased voter support is desired.

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### Survey Results

LeSueur-Henderson School District 2397 November 4, 2003, Referendum  
LeSueur, Minnesota Arlys Graf, LeSueur-Henderson Community Education

The survey was mailed to 263 participants in the LeSueur-Henderson community education program.

The number of responses was 62, or a 23% response rate. As is noted later, the response rate is statistically valid and significant.

#### Community education participants responding voted as follows:

Yes	44	88%	(of those voting)
No	6	23%	( of those voting)
Did not vote	12	81%	(percentage of respondents voting)

#### Overall voters in the referendum voted as follows:

Yes	1,199	60%
No	810	40%
<b>Total</b>	<b>2,009</b>	

### Analysis

Community education participants voted in significantly higher numbers in favor of the LeSueur-Henderson referendum. The difference was 28% (88% to 60%).

### Statistical Validity

A commonly used statistical variation formula provided to us by statistics professor Dr. John Boyer of Kansas State University was used to determine the extent to which the results are valid. The formula is  $\pm$  twice the square root of  $p(p-1)$  divided by  $n$ , where  $p$  is the percentage voting in favor and  $n$  is the total number of respondents.

Using the formula, there is a possible error of 10% in the results. That means the worst possible difference would be 78% to 60%. There is an equal possibility that the actual statistical difference is 98% to 60%.

Thus, the survey results are statistically valid.

### Did community education win the referendum?

The overall referendum passed by just 389 votes. The case could be made that community education votes won the referendum.

### What if... no community education

Without that 28% differential in support provided by community education participants, the votes in favor would have been much fewer, and the votes against much higher, which could have been a defeat for the referendum.

## **Conclusions**

The survey results provide sufficient documentation to support the importance of the community education program in delivering votes for school district referendums.

To disregard the role of community education is potentially disastrous.

The results also indicate that the school district could further enhance its overall community support by strategically growing the community education program by recruiting more participants in certain precincts/wards (or demographic groups) where increased voter support is desired.

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## **Targeted brochure wins referendums**

New brochure strategy gets registrations plus votes

Here's a double whammy of a strategy:

- ❖ Generate more registrations;
- ❖ Generate local votes for your organization's next referendum.

Have separate brochures for:

- ❖ Seniors, those adults age 61 and over; and
- ❖ Baby Boomers, those adults age 45-60.

Two reasons:

- ❖ Each generation responds to a marketing appeal, like your brochure, that is tailored with images and language meaningful to that generation.
- ❖ People age 50 and up vote in huge numbers. Your organization's next referendum (community college; public school; parks & recreation department) depends on the votes of people age 50 and up.

### Prime Times

The Fox Valley Park District in Aurora, Illinois, created a short but attractive brochure just for its senior adults called "Prime Times." Only 8,000 copies of the brochure, which is just 20 pages in length, are printed each time.

Yet the results are phenomenal.

- ❖ Registrations increased substantially, with more than 1,000 participants now involved.
- ❖ The park district referendum passed by a substantial majority.

### **The Brochure**

Here are some of the positive elements of the brochure:

- A four-color photograph on the cover with two seniors in an active activity.
- All the photographs on the inside, and there are plenty, are of seniors participating.
- The inside type is all black ink, which is easier for older adults to read. No fading colored ink to make them squint.
- The type size is all readable, 10 point or bigger.
- All the classes are relevant for older adults. There are no classes for young working adults, for children, or any other audience. The message is clear: this is for you.
- Only 20 pages, so that the printing costs are not enormous.
- Only 8,000 copies distributed, so that the printing costs are not enormous.

### **Generating Votes**

Your program clearly does not advocate directly or ask your participants to vote in favor of a particular referendum.

Here's the strategy. When an adult takes a class from your program, they are more likely to view your entire organization favorably because they are now receiving services from your organization. Therefore, they are far more likely to vote in favor of a referendum than other voters in the general public. The strategy is to serve enough voters with your classes that you have enough votes to win a referendum.

The Fox Valley Park District is 'lucky' in that it can obtain the names and addresses of all adults who voted in a particular election. So they make sure they mail the Prime Times brochure to seniors who vote.

You can also target voters by ward or precinct, mailing brochures to those wards or precincts where you either get favorable votes, or do not get favorable votes, depending on your strategy. Of course mail just to those areas where enough seniors live. In some cases you may want to offer classes in a ward or precinct that is underserved by your program, so that seniors can have easier access.

Amy Larson of Fox Valley Park District told LERN,

*"I do believe you are on track with your theory on the older vote. We have always had a strong senior group, and when the referendum idea was first formed, Prime Times was developed as a strategy to engage this group in more activity for precisely the reason that we would need their support. In our area, the older voters often defeat school referendums. A 71% approval rating is almost unheard of. In Illinois, most referendums fail."*

The next step for all programs is to design and distribute a separate brochure for Baby Boomers, who are now beginning to vote and influence local elections in large numbers. The number of voting Boomers will soon outnumber the number of voting seniors. Do a separate brochure for Boomers now.

## Developing a referendum strategy based on Community Education participation

Simply by creating a program of courses for Baby Boomer adults, you should see increased favorable supportive votes for your referendums.

However, you can become more strategic in your voter support strategy if you wish. The rationale behind targeting specific areas for community education programming and promotion is that people will tell others and your supportive participants will help influence others.

Here's how:

### **1. Identify Baby Boomers over the age of 50.**

These are people born in 1946 and after. Sources for identifying baby boomers include census data, renting mailing lists, voter registration lists (in some communities) and carrier routes of baby boomer participants in your community education program.

At this time we suggest the best sources are:

- Baby Boomer participants in your community education program.
- Rented mailing lists of adults 50-60 in your community.

### **2. Map your two lists.**

You have a list of Baby Boomers aged 50-60 currently participating in your community education program. Create a map by precinct/ward or other voting districting with dots for every one of your Baby Boomer participants.

This is your current strength. While we don't know how each one of these people voted or will vote, we can assume that they are supportive because of our exit polls.

Now create a map by precinct/ward or other voting districting with dots for Baby Boomers aged 50-60 for the general public. This is the voting audience you are targeting.

### **Map voter support.**

Over the general public map of Baby Boomers, write the level of support (56%, 43%, etc.) for each voting area (precinct, ward, etc.)

### **❖ Analyze your maps.**

Now you can compare your maps and find out where you are strong, where the Baby Boomers live, and the voting areas that are supportive.

❖ **Create a strategy.**

Consider one of two strategies:

- Boost support in areas where you are strong. By looking at the maps of where your community education participants are, and the voting percentages, you can see where you are getting support. One strategy is to boost programming in areas where you are strong. That includes:
  - Holding more courses in the area, since people near your course locations are more likely to attend a class close to home.
  - Promote more in these areas.
- Target areas where you are not strong. Another strategy is to look at the maps and see where there are a lot of Baby Boomers, previous votes have not been very supportive, and your community education program is not strong. Your strategy here is the same:
  - Hold more courses in the area.
  - Promote more in these areas.

You may need to do some needs assessment if registrations do not increase in these areas, because there may be some course content, educational level, or predisposition away from attending community education classes in these areas. If so, then go with the first strategy of boosting registrations in areas where you are strong.

By strategically determining where to hold your classes and where to promote your courses, you should be able to generate more support by voting area.

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# Writing Effective Email Promotion Copy

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

## WRITING EMAIL COPY

Suzanne Kart, M.A., CeP  
Director of Marketing, LERN

@suzannekart #lern12

## Why email?

- It's effective
- It's measurable
- It's cheap
- It's targetable



@suzannekart #lern12

## eMail does not replace your print catalog!

- Your catalog is still the most important weapon in your arsenal.
- 75% of registrations still originate with the print catalog.



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## It's not just our field...

- A recent USPS study looked at the shopping habits of nearly 5,000 visitors after they left 135 retail Web sites, including traditional retailers and manufacturers.
- What they found was:
  - 57% of online shoppers said that even though they buy online, they still like to have a catalog on hand
  - 61% of online retail shoppers reported that when they have a catalog while shopping online, they may see additional items they would like to buy
  - 84% of catalog recipients feel it's easier to shop online with a catalog in hand.

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[https://www.usps.com/business/pdf/comScore\\_Retail\\_WP.pdf](https://www.usps.com/business/pdf/comScore_Retail_WP.pdf)

## Better yet

- The study also found:
  - Catalog recipients purchased 28% more items and spent 28% more money than their non-catalog counterparts
  - Sending catalogs more than doubled online sales
  - Websites supported by print catalogs saw a revenue lift of 163% over those that were not supported by print catalogs

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## But eMails are still VERY effective



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## Email promotions that work

- Notices of new courses and events (1 email, several activities)
- Email newsletters
- Single event promotions

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## Two kinds of email

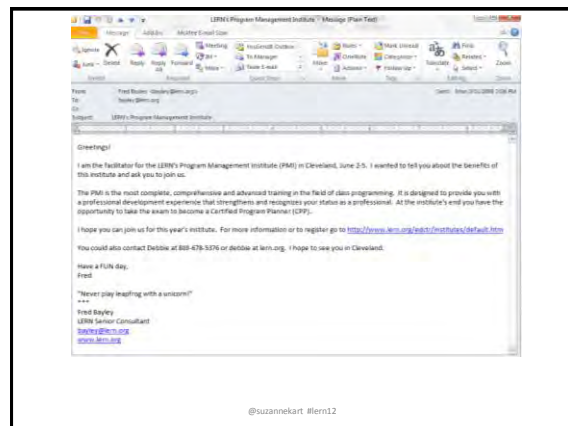
- Text emails
  - Like the kind you send from your computer. All text, no graphics, nothing fancy.
- HTML emails
  - Involve graphic design.
  - Can have color and graphics
  - Can be developed in-hour or done by an outside vendor (LERN recommends this).

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## Text emails

- Good for small lists – up to 200 names
- Get better results when they are coming from an actual person
- Cannot track open rates, click through rates
- Lack visual impression.

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## HTML emails

- Usually get better response than text emails
- Better visual impression: graphic design, color pictures
- Can track open rates, click through rates
- Professional vendor can do the work

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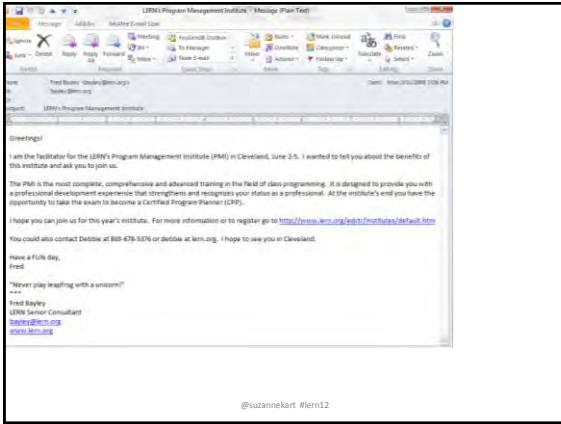
Having a target list is the most important component to success in email promotions



Who do I target?

- High-value segments
  - Those who are the most recent customers
  - Those who are the most frequent customers
  - Those who spend the most

Case study:  
LERN  
Summer  
Institutes



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## The data

- Marketing Institute:
  - 75 people clicked on this link
  - 5 of the clicks attended the institute
  - 14 people total were in the institute
- Program Management Institute
  - 149 people clicked on this link
  - 3 of the clicks attended the institute
  - 39 people total were in the institute
- Generational Management Institute
  - 50 people clicked on this link
  - 0 of the clicks attended the institute
  - 8 people total were in the institute
- Contract Training Institute
  - 42 people clicked on the link
  - 2 of the clicks attended the institute
  - 32 people attended the institute
- Executive Leadership
  - 62 people clicked on this link
  - 0 of the clicks attended the institute
  - 13 people total were in the institute

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## The results

- If you wanted to measure this in dollars, the eMail campaign resulted in 10 Institute participants, which was almost 10% of the participants, and estimated income of \$10,000.

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## Once you've decided on a list – now what?

- Some parameters for sending out ePromotions

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## Some tips

### Make them feel special

- Use the person's first name, if you have it

### Give an exclusive discount

- Tell the person that they are among a select few to receive this discount

### Add urgency to offer

- Give them a deadline

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## Never put names in to: or cc:

- Rule: If you are sending out email promotions, never put the names in either "To" or "CC"
- This disrespects people's privacy and spammers will get the email addresses
- Always put names in BCC – if you are not using a third-party vendor

@suzannekart #lern12

## Subject line

- Very important. Like the cover of your brochure. Determines whether people read on
- Generally keep the subject line the same
- Create familiarity with your program
- Tell them in the subject line the email is about upcoming courses

@suzannekart #lern12

## Sample subject lines

- Upcoming classes from the Workforce Development Center
- New Dental CE courses
- Next CE class session starts soon!

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## How many people should be opening your emails?

- Open rate – 20%
- Click through rate – of those who open the email, you want 10-20% to click through
- If you're not getting the open rate you hope for, look at
  - Your list
  - Your subject line
  - The relevance of the information

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## Unsubscribe notice

- Rule: always have an unsubscribe notice in every email
- Anytime you get an email address, it means you can send the person email
- BUT anytime a person doesn't want email, you need to stop emailing that person

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## Best format for email promotions

- Four paragraphs of copy is ideal. 3-5 is good
- Space between the paragraphs of copy
- Each item needs to be separate
- Have a theme – upcoming courses, new event, etc.
- Graphic or picture with each item gets more attention
- Every item should have a click for more information
- Use the sidebar to promote/sell extra item

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## Four keys to copy writing for great email promotions

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### Key #1

- The first sentence/paragraph is critical
- Get right to the point, to the meat, to the core of what the news item (course/event) is about
- No introduction
- No history
- No beating around the bush

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### Example first paragraph

#### **LERN's Program Review Helps Boost Revenue, Increase Enrollments**

In the 21st Century, competition is greater than ever. If you want to make your program the most efficient and effective it can be, [LERN's Program Review \(hyperlink\)](#) is the answer.

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### Key #2

- Use good action verbs in the first sentence and every other sentence
- Don't have the same verb in each sentence
- Some action verbs:
  - Discover
  - Create
  - Develop
  - Win
  - Get
  - Build
  - Satisfy
  - Experience
  - Enjoy

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### Example

#### **Nine Shift Strategic Planning Seminar**

Come experience two days with experts who spend every day on the cutting edge of education. Discover how society is changing as we move from the Industrial Age to the Internet Age. Learn about the implications for repositioning your community or technical college for success in the new century.

Then take home our exclusive 21 action recommendations for strategic planning for community and technical colleges, and participate in the adventure to make our education even more successful in the second decade of the century.

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### Key #3

- Use "you" language.
- Use second person. Don't say "we."
- Don't say "they" (or "participants.")
- Say "you" (You will get ...)

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### Key #4

- Stress outcomes and results
- Talk about what will happen after they attend your course or event
- "Take home..."
- "Come away ..."
- "You'll find out ..."

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## Key #5

- Don't "Over Content"
  - Less is more
  - Small paragraphs

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## Key #6

Every part of the eMail matters

- Don't just focus on only the subject line or call-to-action - realize every email walks readers through a progression of steps:
  - Subject line
  - Headline
  - First paragraph
  - Body copy
  - Call-to-action

@suzannekart #lem12

## Next level in email copy

- Segment your audience
- You have 7 primary market segments
- Write different email promotions specifically for each primary market segment
- Send just one of the emails to each customer
- Start with your 2-3 biggest market segments

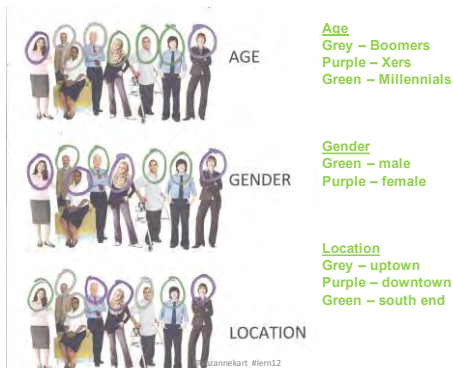
@suzannekart #lem12

## Finding Your Seven Primary Market Segments

- Step 1: Get registration software
- Step 2: Run out your best 200 participants
- Step 3: Survey your best participants
- Step 4: Analyze your demographics
- Step 5: Get data for all participants
- Step 6: Now you know

@suzannekart #lem12

## There are many ways to segment a market



@suzannekart #lem12

## Email newsletters

- Some programs also do email newsletters
- If you have the time, email newsletters are an excellent way to promote your program

@suzannekart #lem12

## Email newsletter definition

- An email newsletter:
  - Provides information of interest to your customers
  - Comes out on a regular basis
  - Is sent to past participants, inquiries, and others who sign up for the newsletter
  - Is NOT sent to those not requesting it

@suzannekart #lern12

## Keys to starting an email newsletter

- Use email addresses from your current participants
- Have a sign up on your web site
- Think of something your best customers want to know
- Promote our classes/events in your email newsletter
- Come out once a month

@suzannekart #lern12

## Tips for articles in email newsletters

- Have 3 to 10 paragraphs of copy
- One to 3 sentences per paragraph
- Provide 2 articles for every 1 “ad” for your courses or events
- Look for items of interest to your readers. Trends, news, practical “how-to” tips are some examples of good articles or items
- Link to your web site and registration for events
- Avoid linking to other sites, if possible

@suzannekart #lern12

## Video emails

- Video emails can be a very effective way to engage your key constituents.
- It’s actually quite easy to do.

@suzannekart #lern12

You don't really imbed the video, you take a screen shot of the YouTube screen (ctrl+print screen), put the picture in your email, and hyperlink it back to YouTube

@suzannekart #lern12

## Last, but not least, planning

- You need an email schedule
- Four emails before the sessions start
  - 6,4,2, and 1 week out
- Don't suspend all emails to everyone because of a couple infrequent complaints – look at the behavior of the recipients as a whole

@suzannekart #lern12



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### 10 Sales Mistakes That Can Sink Your Ship

Rick Walsh  
Consultant  
LERN  
Virginia Beach, VA



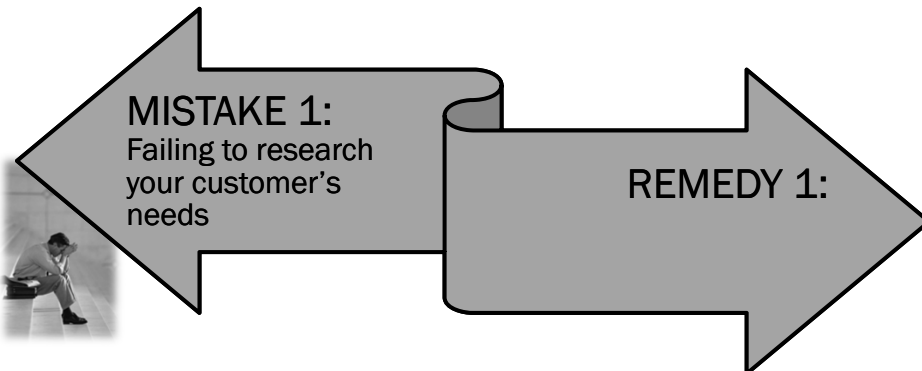


Richard T. Walsh, Ph.D.  
Senior LERN Consultant

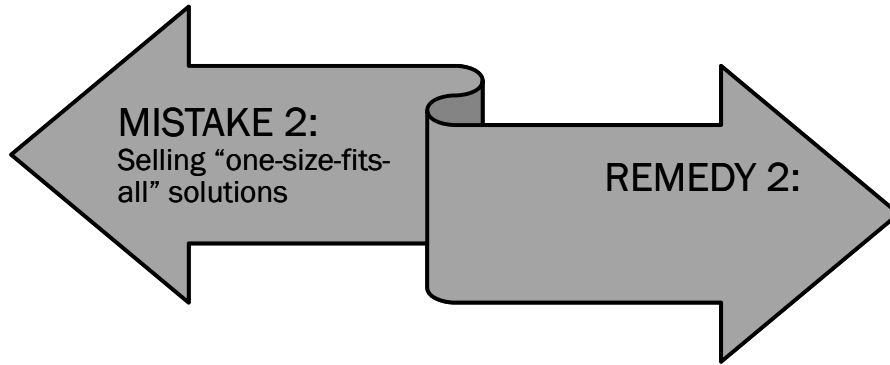
# 10 SALES MISTAKES THAT CAN SINK YOUR SHIP

LERN 2012 Conference  
Washington, DC – November 16-18

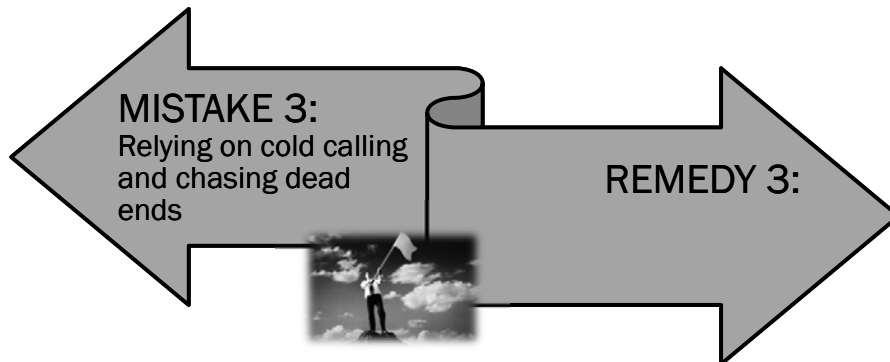
## MISTAKE 1



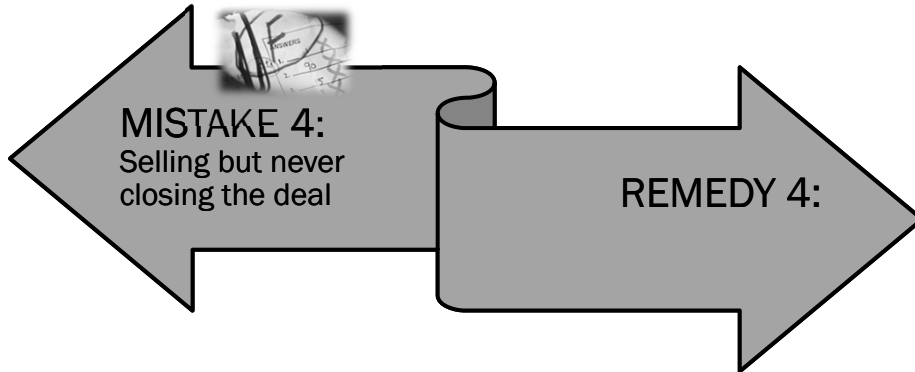
## MISTAKE 2



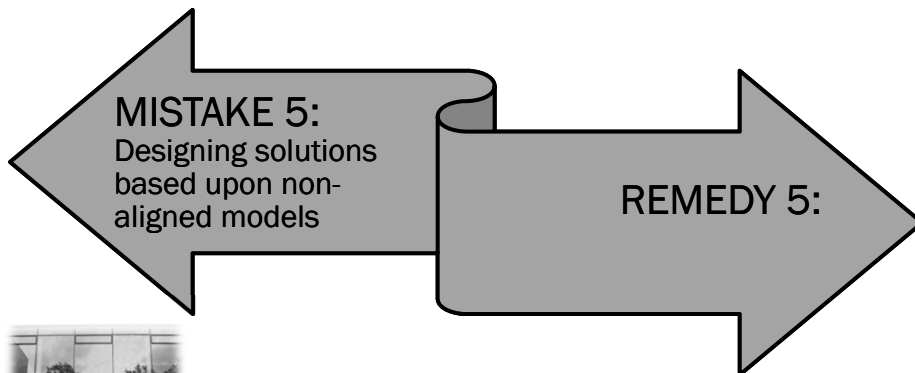
## MISTAKE 3



## MISTAKE 4



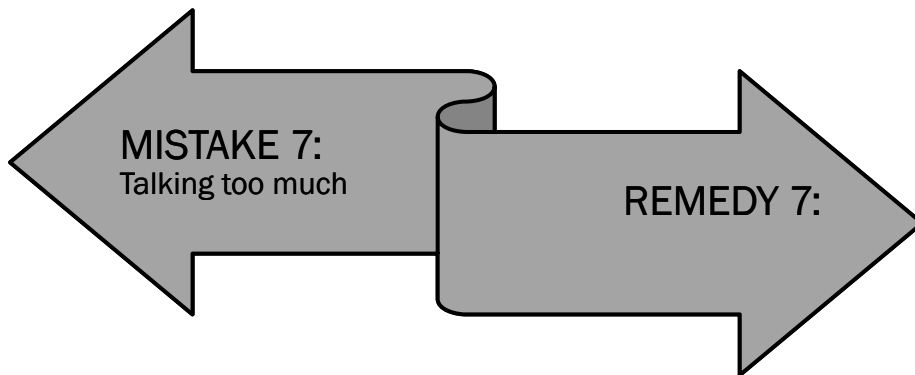
## MISTAKE 5



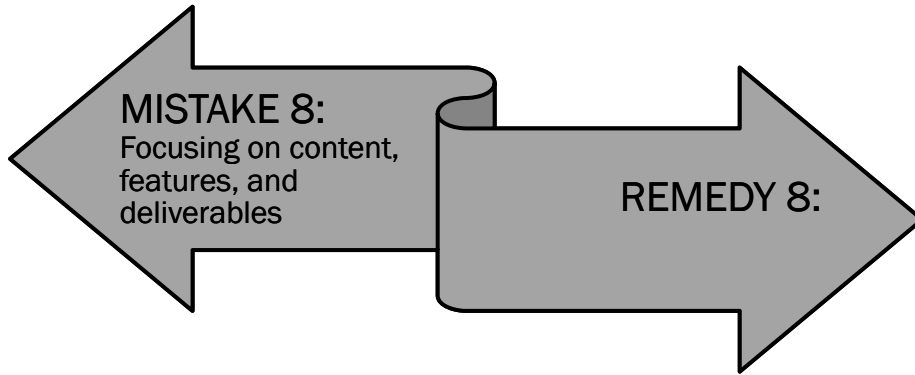
## MISTAKE 6



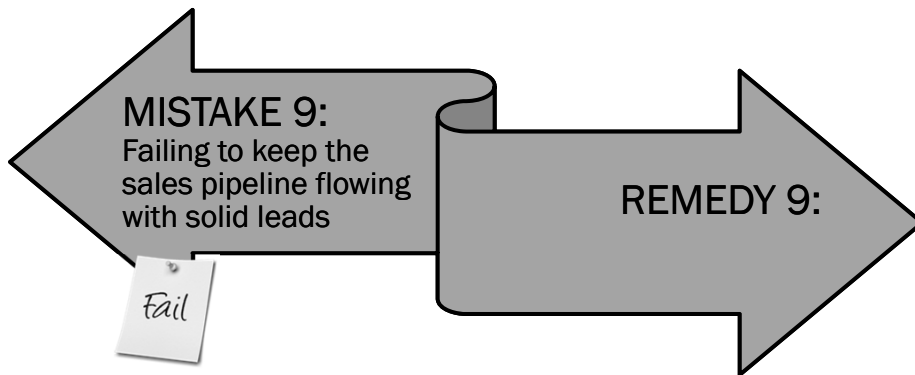
## MISTAKE 7



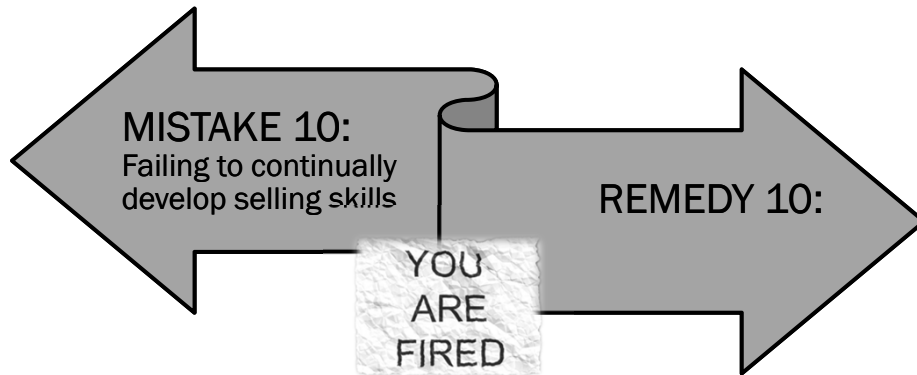
## MISTAKE 8



## MISTAKE #9



## MISTAKE #10





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### Mid-Career, Now What?

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

## Mid- Career Now What?

Redefining success at work

Suzanne Kart, CeP, MA  
Director of Marketing  
LERN



## Just a little about me...

- B.A. – MSU
- M.A. – SVSU
- Been in marketing & communications for 19 years
- Spent nine years working at Delta College before being recruited by LERN five years ago
- Present workshops and seminars throughout North America
- Director of Marketing at Learning Resources Network (LERN)



## This is a presentation about Gen X

- There are four generations of American adults, but today we're really just focusing on one: Generation X.
- All generations have strengths and weaknesses – and I don't believe any generation is better or worse.
- If you're not a Gen Xer, I hope you'll look at this from a Covey perspective (Seek first to understand, then to be understood).
- And if you are an Xer, I hope you'll see that we have some generational challenges and it's not just you...



## Why this topic?

- Gen Xers are entering new territory – and we probably won't handle it like the Boomers did.
- Let's face it, we're on our own – again.
- Gen Xers often won't engage in these types of conversations with people from other generations.
- The future is really bright for Xers.



## Our time is now

Doug Soo, Dean of Continuing Studies  
at Langara College in Vancouver, BC

and

Jan Wahl, Associate Dean, College of  
Extended Studies, San Diego State  
University

Both announced their retirements this  
year.



## How many programs have good succession planning in place?

- The competition to recruit Gen X continuing education leaders will be fierce in the coming years





## Our strengths are being recognized – by some

- Will these new roles suit the times? I think perhaps they will. Bill Strauss and Neil Howe, coauthors of “Generations” *Generations* posit that each generation makes a unique bequest to those that follow -- and generally seeks to correct the excesses of the previous generation. They argue that the Boomer excess is ideology -- and that the Generation X reaction to that excess involves an emphasis on pragmatism and effectiveness.
- This generational priority will give X'ers a strong advantage in remaking organizations to reflect twenty-first-century realities: the need for transparency, accountability, real-time performance, lack of ideology, top-of-market effectiveness, and cash value.

Finally, Gen X Takes Over  
Tammy Erickson, Harvard Business Review Online, 1/11/09



## We have an image problem



## From academia

From Academia:

“(Gen Xers) are more materialistic than past generations but have less hope of achieving their goals.”

“Essentials of Marketing” textbook, Fourth Edition



## From the consultants

“(Managers) say (Gen X) employees often:

- Are not reliable
- Are not willing to work long hours
- Think in terms of “job” – not “career”
- Have unrealistic expectations about raises and promotions”

“Managing Generation X”  
An article by Claire Raines on the website  
[www.generationsatwork.com](http://www.generationsatwork.com)



## From the media

“Indeed, some managers wonder why they should invest in training a new employee if she’s going to take those hot new skills – skills you’ve paid for – and jump to another company. That can’t be good for the bottom line.”

“Managing Generation X”  
Article by Mindy Blodgett post on CNN.com



## From the literature

Gen Xers indulge in “selfishness in personal manner, risk-taking with sex and drugs, crime, violence and social decay...”

“Millennials Rising: The Next Great Generation”  
By Neil Howe and William Strauss



No wonder we feel crushed

But are we *really* being crushed between the Boomers & Millennials?




But Gen Xers already have accomplished a lot



Dharmesh Shah,  
Founder of Hubspot



Gary Vaynerchuck  
Best-selling author  
Gary launched Winelibrary.com and helped grow his family business significantly from \$3 million to \$45 million by 2005



Rand Fishkin, CEO of SEomoz



Jennifer Canty, founder of Dyscem



Susan Cain, Author, *Quiet: The Power of Introverts in a World That Can't Stop Talking* (born 1968)

Author Jeff Gordinier argued in "Gen X Saves the World" that Boomers & Millennials are "macro" generations and Xers are a "micro" generation.

I would argue, based on Cain's work, that Generation X is a more introverted generation (latchkey kids, disaffected youth, not necessarily joiners) and Boomers and Millennials tend to be more extroverted (Woodstock, Occupy movement ).

And if you take to heart would Cain says, embracing who you are will make you more successful.





What does success look like for Gen X?












Is it different than the Boomer view of success?







From Blogger Penelope Trunk (last quote, I promise)

"Newsweek ran a piece titled Leading the Way to focus on women who will, supposedly, lead in the 21st century. The list includes a bunch of women who either didn't adjust their careers for kids or have jobs that are incompatible with family. Here are some examples:

- Sarah Change: "I travel all year long. And every week is a new city."
- Renee Reijo Pera: Re "At 47, I am going to become a mother soon."
- Marissa Mayer: "Google is a very comfortable environment for me because...a great late-night conversation really inspires me."

**The women of Newsweek are not the heroes of my generation. On the whole, my generation is not interested in this sort of achievement. Not even the men.**

## Two roads to choose from:

- Traditional road – work 60 hours, claw your way up the ladder, take no prisoners, quote Stephen Covey a lot.
- 21<sup>st</sup> Century road – first figure out what you really want from your life and then make your career fit your life, not visa versa.



## Family first. Business second.

- A recent study from Wharton found Gen X workers are “unhooking from the pressure to follow an upward path that someone else has set”
- “The National Study of the Changing Work Force” from the Families and Work Institute shows the same thing. 67% of respondents said they were not willing to sacrifice their personal lives for their jobs.



## Are we dropping out?

No!



## Xers are doing great things



Dan Belhassen  
CEO Modern Earth



Jennifer Selke, Ph. D  
U.C. Berkeley



Leanne Doyle  
University of  
Wisconsin Fond  
du Lac



Guy Felder  
University of  
Houston



Heather Dimitt  
LERN Director of  
Membership Services



## You need to know where you're going



## What does your dream job look like?



## Build your network

Whether it's moving up in your organization, staying where you are, or finding something new – the days of finding a good job without networking are OVER.



*"Information That Works!"*

## Don't focus on changing minds, find new minds



*"Information That Works!"*

## Challenge: This is the way it's always been

- Many Boomer leaders can't imagine a workplace that's different than the 20<sup>th</sup> Century workplace (cubicles, managers watching, keeping "busy.")



*"Information That Works!"*

## What can you do about it?

- Find the right boss
- Be like Hannibal Lector (patient, not cannibalistic)
- Plant the seed in the spring, harvest in the fall



*"Information That Works!"*

## Challenge - Breaking ground is hard to do

- Telecommuting brings flexibility – and loneliness
- Part time work brings home time – and less money
- Entrepreneurship brings control – and risk
- Being the top dog brings prestige – and sacrifice.



*"Information That Works!"*

## What can you do about it?

- Research – know ahead what you're getting into
- Listen more than you speak
- Give it time



*"Information That Works!"*

## Do you need to be in charge?

- Hierarchy is flattening
- Xers seem to prefer knowledge work – and the LERN Institutes confirm it (to an extent)



## Thank you!

SuzanneKart.com





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# Overcoming Social Media Excuses

Jennifer Selke  
University of California-Berkeley  
Berkeley, CA

# Overcoming Social Media Excuses

Jennifer H. Selke, Ph.D.

www.jennselke.com

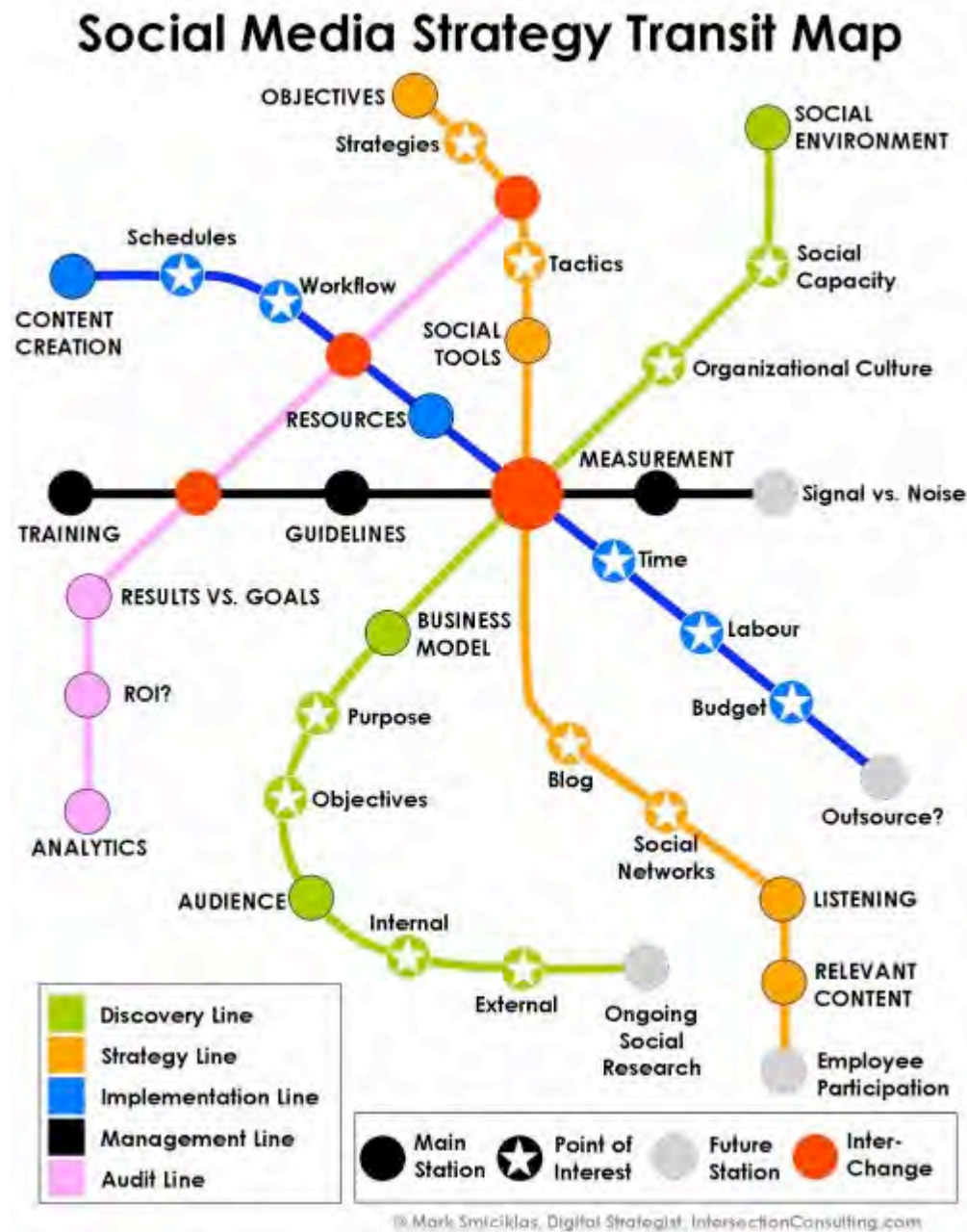


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### Program Development Tools

Fred Bayley  
Consultant  
LERN  
Forest City, NC



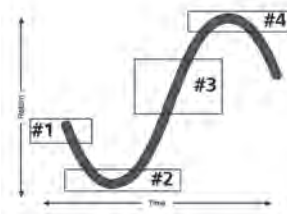
### 1. 10 Right Questions of Success

1. Is this the right audience?
2. Is this the right subject area?
3. Is this the right topic?
4. Is this the right title?
5. Is this the right format?
6. Is this the right place?
7. Is this the right time?
8. Is this the right instructor?
9. Is this the right price?
10. Is this the right promotion?

### 2. Ideal Programming Percentages



### 3. “S” Curve of Program Development



### 4. Select Repeat Programs

- a. Determine number of courses
- b. Analyze competition
- c. Analyze past program performance
- d. Develop product mix for market segments
- e. Cut the dogs!!

### 5. Why Create New Courses

- a. Generate new sales
- b. Increase operating margin
- c. Build customer base
- d. Keep brochure fresh and current
- e. Respond to customer needs
- f. Cut out losers

## 6. Where to Expand

	Current Customers	New Customers
Existing Products	<p><b>Now</b></p> <p>You have existing products for existing customers.</p>	<p><b>Good Expansion</b></p> <p>Take an existing product to a new audience.</p>
New Products	<p><b>Good Expansion</b></p> <p>Create a new product for your existing customers.</p>	<p><b>Poor &amp; Risky</b></p> <p>It is extremely difficult to succeed by creating a new product for a new audience. Stay away from this option.</p>

## 7. Five-Step Process for New Courses

- a. Get ALL of the alternatives
- b. Ask what to eliminate
- c. Survey for top vote getter
- d. Model the numbers
- e. Now go with your hunch

## 8. Format Variations

Spinning off a successful course into other formats has 3 benefits.

- Greater income
- Greater participation
- Higher repeat rate

### Alternative Formats

- Class
- Activity
- Trip or tour
- Event
- Contract
- Seminar
- Conference
- Online
- Self-study
- Certificate
- Institute
- Hybrid

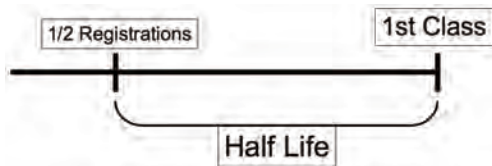
## 9. Laser In On Product & Market



## 10. Course Half Life

The number of days or weeks before the first class when half of the students have registered. This helps decide

- If more sections are needed
- Where to put last minute promotion resources



## 11. More Tools

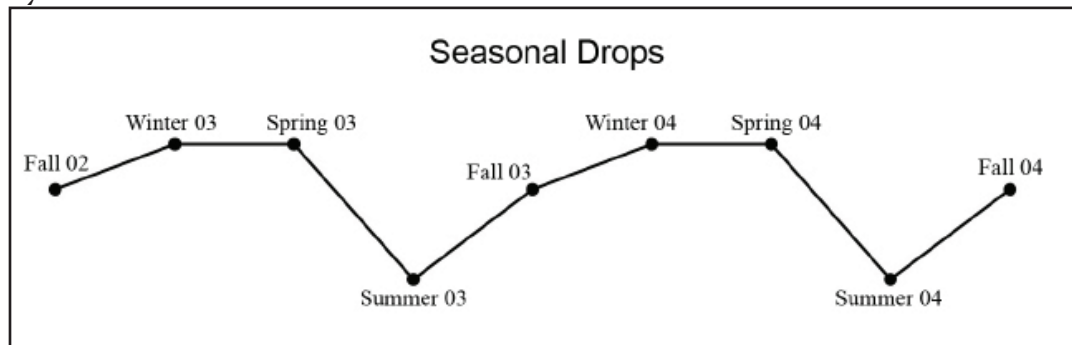
Division Performance Purpose: To determine which program has greater staff efficiency.

Division	A	B	C	D
Number of courses offered	100	100	20	400
Number of courses cancelled	20	30	4	120
Number of registrations	1,600	1,400	256	3,360
Average registrations/course	20.0	20.0	16.0	12.0

Best performing division \_\_\_\_\_

Worst performing division \_\_\_\_\_

Seasonal Drops Purpose: To determine if changes are cyclical or unusual occurrences.



Sessions Purpose: To determine seasonal loads.

Sessions			
	% Income	% Course or Event	% Promotion
Fall	40	30	30
Winter	20	20	30
Spring	30	40	20
Summer	10	10	20

Registration Pattern Purpose: To track ways that people register.

Registration Pattern Review	
When People Register	M 25%, T 20%, W 15%, Th 10%, F 15%, Sa 10%, Su 5%
How People Register	Phone 75%, Mail 10%, Walk-in 5%, E-mail 6%, Fax 2%, Online 2%
How People Pay	Cash 5%, Check 15%, Credit Card 80%

Quarter Review Purpose: To determine diversity of program offerings.

Quarter Review							
	Open Enrollment Courses	Contract Training	Conferences	Events	Seminars	Certificate Programs	Online Courses
Qt. 1							
Qt. 2							
Qt. 3							
Qt. 4							

Purpose: To determine the average or overall success as compared to the budget and last year.

Variance Analysis				
	\$	%	To Budget	To Last Year
Income				
Promotion				
Production				
Direct Costs				
Operating Margin				
Administration				
Net				

## 12. Analysis Lifelong Learning Program

Division 1	Division 2	Division 3
Division 4	Division 5	Division 6

## 13. Benchmarks

- a. Percentage of new courses each year: 20%
- b. Percentage of surplus: 5%
- c. Number of promotion methods: 3
- d. Cancellation rate
  - Courses: 15%
  - New courses: 30-50%
  - Seminars & conferences: 0%
- e. Participants evaluations of registration & courses: 4+ out of 5
- f. Response time to customer problems, questions & requests: 24 hours
- g. Number of divisions: 5-10
- h. Repeat rate: 30-50%
- i. Average registrations per course: 10-20
- j. Brochure:Participant ratio: less than 50:1



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### Stomping the Competition

Paul Franklin  
Consultant  
LERN  
Portland, OR

**Stomping the Competition**



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**Who is the Competition?**

Define the competition.

- Not every organization out there is your competition.
- There are probably no more than five organizations that are legitimate competitors.

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**Rule #1: Copycat**

- ▶ "It's better to be a good copycat than a great inventor" — unknown inventor
  - Study the "star" programs of others and study them some more.
  - Be second out of the gate.

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## Become a Copycat NOT an Inventor

- Clone the competitions' Star Programs but make slight changes.
  - Different title
  - Make it brand new
  - Make it MORE!
  - Price it differently
  - Target it to a specific market segment

Only clone the competitions' Cash Cow Programs **if** there is PLENTY of room in the market OR of targeted to underserved market segment.!

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## Program to the Gaps...

- Possible Gaps
  - Product Areas ...
    - Select areas not supported by the competition.
  - Market Segments ...
    - Offer same product to an underserved population.
  - Delivery Methods ...
    - Same product but delivered differently.

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## Look Beyond Your Backyard

- Study an established benchmark group of non-competing programs.
- Clone the best of the benchmark group AND don't tweak.

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**Rule #2: Protect Your Best Customers at All Costs!**

- 20-25% of your customers give you 80% of your Operating Margin.
- To learn who they are, segment the market.
- Once you know who they are:
  - Focus on them.
  - Ask them what they want.
  - Design and offer what they want.

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- Survey them continuously.
- Program specifically to them.
- Hold special events just for them.
- Create loyalty-building efforts.
- Cajole, pamper and coddle them.

PROTECT THEM!!!!

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**Rule #3: Price to Win**

- Price above your competition.
  - BEWARE: They can't know how you are different and better unless you tell them six ways to Sunday.
- Compare and contrast what you offer as opposed to the competition.

SURPRISE: Often a higher price brings new people to the market.

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### Price to Win

- Price the same as the competition and rely on your differences.
  - Time, title, content, materials, location, instructors.
- Tell your customers and prospects exactly how you are different and why it's good for them.

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- Price just below the competition.
  - Stress same value at a lower price.

OR

- Good value, no frills, lower price.

BEWARE: Live by price die by price!

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### Rule #4: Play the Lifetime Value Game

- It costs seven times more to get a new customer than to keep a current customer.
- Frequent sales to current customers over a sustained period of time yields exponential value to your bottom line.

AND, it makes your life easier!

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### Lifetime Value Game

- Make retention AND frequency improvement the highest priority.
- Create courses for current customers.
- Practice stair step programming.

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### Rule #5: Play Your Cards Close to the Vest

- Be careful ....
  - What you say and where.
  - How you handle phone inquiries.
  - What numbers you reveal anywhere.
  - What you say in print.

A little paranoia is very good business in our profession!

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### Rule #6: Out Promote Them!!!

- Mail more often to your best customers.
- Provide better and more detailed promotions.  
Use e-mails, e-zines & more to stay in touch, offer deals, promote retention
- Always, always focus on "WIFM."

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➤ Integrate contact portals "just for them."  
➤ Provide more information on your website.  
➤ Learn from the pros.

Get a 20-25% boost by guaranteeing your programs!

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**Rule #7: Let them know how you are better!**

➤ Educate your prospects and customers about your advantages.  
– Compare, contrast, juxtapose.  
– Prove it with a good guarantee!

➤ Don't inform them about your programs, **educate** them to the value of your programs!

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**Rule #8: Know Them as Well as You Know Yourself**

➤ Make stomping the competition a priority.  
➤ Watch your competition.  
– Put staff time into it.

The key to protecting your best customers is to study the competition.

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### Tactics for Knowing Your Competition

- Be a customer and call.
- Be a customer and go.
- Get on their mailing lists.
- Visit their website.
- Be a part of their web discussions.
- Analyze their offerings.

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### Know your Competition

- Analyze their promotions.
- Analyze their market share and project their numbers.

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- Develop a data sheet on each competitor.
  - enrollments for the past year
  - average class fee
  - gross income (estimate)
  - percent of existing market
  - type of programs offered

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### Study the Data

- The following data can be estimated by your knowledge of the business.
  - Enrollments
    - Multiply number of classes offered by your average participants per class.
  - Average class fee
    - Add all fees in the catalog and divide by number of classes or events listed.

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### In the sum...

- Know who your competition really is
  - there are probably no more than five
- Put staff time to watching and studying your competition
- Do whatever it takes to know them like you know yourself!
- Focus on the gaps – product areas, market segments, delivery methods.

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### Now Go STOMP!



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# The Skills of Influence: Enlisting Others to Accomplish Key Goals

Julia King Tamang  
Consultant  
LERN  
Portland, OR

## THE SKILLS OF INFLUENCE

ENLISTING OTHERS  
TO ACCOMPLISH KEY GOALS

Julia King Tamang – LERN

### 4 good reasons why you need influence skills



- Old-fashioned, formal authority doesn't cut it anymore
- A thought-out plan & flexibility to change as you learn about a situation
- Work is flat these days, you have to work in partnerships, teams, and groups
- You can get more work done
  - while reducing conflict, relieving stress, negotiating better

### Determine where you want more influence



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### The 2 fundamental factors



Your goal



The other person

### Your goal

- What do you want?
  - What does success look like in this case?
- How will you make this clear to the other person?

### The other person

- What's their mindset?
- What's important to them?
- What's going on in their organization or other "group" that might affect this situation and how they work with you?



### Who do want to influence and why?

- The person you need to influence is sometimes not the person who comes to mind
- Give yourself a time frame in which to influence

- Get crystal clear: What will the other person have done when you have reached your goal?
  - State this goal in positive terms—what you want them to do, not what you want them to stop doing
- Check your mindset/assumptions
  - Don't forget to consider how the other person needs **you**

### Try this



- How does the world look from this person's perspective?
- What do they want and need?
- Is there a way they can get this and you can get what you want and need, too?
- What's important to them, what is not?
  - What's worked for them in the past?
  - Who are they trying to influence?

### Influencing a group

- Are there conflicting agendas inside the group?
- What do you want from the group?
  - It's ok if it's an emotional appeal.
- Form a private coalition with people in the group who will support your initiative.
  - How will you get an opportunity to do this?
- Carefully form a case for how what you want will bring benefit in **their** present and future.

### Learning the behaviors that drive influence success



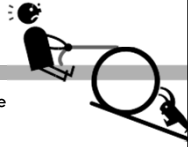
- PUSH energy**
  - I know what I want, I am clear
  - I advocate until I get it
- PULL energy**
  - Inclusive, listening, engaging, considering the wants of others and asking non-assumptive, open-minded questions
  - It can gain commitment, break down resistance, spawn warm, collaborative relationships



### PULL or PULL energies

- When does it NOT work with you?
- When does it work?
- What does it feel like?

## PUSH – PULL energy



- It's the **BLEND** of the two that gets influence
  - ▣ 1. **Assert** clearly what you want
  - ▣ 2. **Suggest** how the other person can help you get it
  - ▣ 3. **Ask questions**, “open-minded” and “focused” to learn more about how to proceed
  - ▣ 4. **Summarize** their answers to your questions, so they know you have actually heard
  - ▣ 5. **Offer incentives**, if you can so it's attractive for the other person to help you

## Consider

- ▣ How much do you want to use each, if at all?
- ▣ How do you want to use these, exactly?
  - 1. **Assert**
  - 2. **Suggest**
  - 3. **Ask questions**
  - 4. **Summarize**
  - 5. **Offer incentives**

## Consider the kinds of communicator you are working with

- Authoritarian
- Analyzer
- Visionary
- Supporter
- And more!

## Building an influence strategy

- 1. Identify situational factors
- 2. Identify behaviors
- 3. Determine the behavior sequence
- 4. Create a distancing strategy



## Building an influence strategy

- **Identify situational factors**
  - ▣ What's your goal? What do you want? Who do you need to influence?
  - ▣ How will you know if you get what you want?
  - ▣ What assumptions are you making?
  - ▣ How might the other person be thinking of you?
  - ▣ What can you do to make it easier for the person to agree to help you?
  - ▣ Consider what's happening in the other person's organization and be sensitive to that.

## Building an influence strategy

- **Identify behaviors that will help**
  - ▣ Assert
  - ▣ Suggest
  - ▣ Ask questions
  - ▣ Summarize to show understanding
  - ▣ Offer incentives



### Building an influence strategy

- **Determine the behavior sequence**
- Is there trust? Rapport?
- What will your action likely “inspire”?
  - ▣ Is that the result you want?



### Building an influence strategy

- **Distancing strategy**
  - ▣ Employ this if it gets too hot, if it gets too fast for careful action,
  - ▣ Remember, it's the RELATIONSHIP you need, to achieve influence... so protect it!



Need some help doing this?

Let me know!

kingtamang@lern.org

**Assessing Your Native Strategy - Push/Pull**

Are you more comfortable with Push behaviors or Pull behaviors? Why?

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Any patterns that you notice? Where would you like to improve?

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Select one behavior—Push, Pull, or Push/Pull—that seems most important for you to improve upon. Why this one?

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If you were to use this behavior more effectively, what impression/effect would you leave on others?

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## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Winning with Advisory Boards

Greg Marsello  
Vice President  
LERN  
Tiverton, RI




Winning With  
Advisory  
Boards

Washington, DC  
Conference 2012

Greg Marsello

### What is a Customer Advisory Board?



### Why Create Customer Advisory Boards?



### Is a Customer Advisory Board a Focus Group?



### Aligning Strategic Goals with Customer Advisory Board



### Customer Advisory Board Design

- Membership identification
- Member recruitment
- Member recognition
- Member engagement
- Member tenure

## Customer Advisory Board Meetings



Can You Run a Customer Advisory Board Successfully Online?



## Delivering Value to ...

- Members
- Organization



**THANK YOU!**



**GREG MARSELLO**  
**[WWW.LERN.ORG](http://WWW.LERN.ORG)**



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### Enrollment Analysis

Fred Bayley  
Consultant  
LERN  
Forest City, NC



## Enrollment Management by UAB Special Studies

Information Planning Cycle (4 points of control)

- ❑ The Black Box – *historical cost analysis*
- ❑ Marketing Strategies – *production schedule*
- ❑ Cancellation Meeting – *go/nogo decisions*
- ❑ MOR – *management operations review*

1

## THE BLACK BOX

- ❑ Based on Direct Costing Method
- ❑ Courses Divided by Old and New
- ❑ Based on actual historical enrollments from past 3 terms
- ❑ Examines trends and seasonality
- ❑ Change titles, price, description, or pull it out

2

### The Black Box Planning for Fall

Old	Fall	Winter	Spring	Average	Course			Contribution	
					Fee	Direct Cost	Revenue Needed		
Spanish <i>(decision=raise fee/open more classes)</i>	41	33	22	32	\$99	\$550	\$1,100	\$3,168	83%
Elegant Holiday Parties <i>(seasonal)</i>	24			24	\$50	\$365	\$730	\$1,200	70%
Body Sculpting for Women <i>(Spring bathing suit season)</i>	6	9	20	12	\$50	\$230	\$460	\$600	62%

### The Black Box Planning for Fall

New	Fall	Winter	Spring	Average	Course			Contribution	
					Fee	Direct Cost	Revenue Needed		
<i>New (analyzed against overall enrollment)</i>									
Smart Women Finish Rich				9.4	\$40	\$200	\$400	\$376	47%
Video Game Production <i>(raise to \$99)</i>				9.4	\$85	\$595	\$1,190	\$799	26%
Bass Pro Experience <i>(Cut direct costs to \$600 and raise price to \$89)</i>				9.4	\$50	\$835	\$1,670	\$470	-78%

9.4 = average new course enrollment from previous like term

## MARKETING STRATEGIES

- ❑ PRODUCTION SCHEDULE
  - Work In 4 Terms All The Time In Various Stages
- ❑ MARKETING MEETING
  - Determine Promotional Strategies
  - Budget Overview
  - The Catalog
  - Distribution Plan
  - Zip Code Analysis

continues

5

## MARKETING STRATEGIES: Distribution and Outreach

- ❑ Distribution
  - Mail printed material to Past Participants, Residents, Business and Campus Deliveries
  - Newspaper Insertion - Sunday Metro Newspaper
  - Display ad campaign to "Look for the Book" in newspapers, campus and local periodicals
  - Racks in campus buildings, local businesses, libraries and restaurants
  - Website & Email
  - Special Events like business fairs
  - Radio Spots

6

## Focus Groups

- ❑ Survey Top 200 Students in last two years to Receive Feedback About Effectiveness of Programs and Service, Areas of Improvement and Demographic Information
- ❑ Top 200 by Dollars spent and by Frequency of enrolling in programs for a defined period of time. "Recency, Frequency, Monetary"

7

## CANCELLATION MEETING

- ❑ Go/ No Go Decisions  
Direct Costs vs. Enrollment
- ❑ Old vs. New Course Cancellation Rates
  - Old 10 – 12%
  - New 33 – 50%
  - Total Cancellation Rate 15%
- ❑ "C.C.V.D."

8

## MOR

- ❑ Management Operations Review
  - Overall Curriculum by Market
  - Law of Averages
  - Cancellation
  - Old vs. New Courses
  - Methods of Registration
  - Top Courses by Enrollment, Revenue, etc.

9

## UAB Special Studies Noncredit Curriculum

Curriculum	Income	Contrib.	% of Income	Total Enroll.	Programs Ran	CEU's
Academic & Career Development	\$ 99,930	\$ 41,126	41.2%	490	34	875
Arts & Humanities	\$ 48,039	\$ 27,125	56.5%	770	39	770
Computers/Online Learning	\$ 174,718	\$ 78,595	45.0%	684	74	946
New Horizons Senior Program	\$ 26,020	\$ 14,361	55.2%	148	4	1,065
Personal Enrichment/Money Matters	\$ 21,928	\$ 10,475	47.8%	321	18	256
Photography	\$ 23,880	\$ 12,252	51.3%	270	18	407
Sports & Fitness	\$ 47,703	\$ 23,294	48.8%	811	57	999
Youth Programs	\$ 20,627	\$ 8,756	42.5%	229	19	230
<b>Sub Total</b>	<b>\$ 462,845</b>	<b>\$ 215,984</b>	<b>46.7%</b>	<b>3,723</b>	<b>263</b>	<b>5,548</b>

## UAB Special Studies Old vs. New Programs

Curriculum	Offered	Cancelled	Ran	% Cancellation
Old Programs	279	46	233	16.5%
New Programs	41	11	30	26.8%
<b>Grand Total</b>	<b>320</b>	<b>57</b>	<b>263</b>	<b>17.8%</b>

## Maintaining Financial Records for Your Decision Makers

- Anticipate Trends Upward or Downward
- Establish Life Cycles of Programs
- Define the Sensitive Areas of Direct Costs
- Recognize Effective Employee Performance
- Interrelate Efforts of Separate Units
- Portray the Bottom Line Clearly
- Allow You to Plan and Take Action Accordingly

12



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### How to Cut Brochure Costs

Nancy Hulverson  
LERN  
Bellevue, WA

## How to CUT Brochure Costs



**LERN** Annual Conference – Washington DC – November 2012

## Marketing Decisions

**AVOID -**

- ❑ Eliminating brochures completely
- ❑ Printing your brochures with only course titles and no content information
- ❑ Making your customers work harder to access information on your program
- ❑ Making major changes in your marketing without testing first

You CAN trim brochure costs without decreasing quality and convenience for your customers!

## Marketing Decisions

**DON'T WASTE \$\$**

- ❑ Use LERN's Marketing Segmenting and Carrier Route/Postal Code analysis tools (FREE for LERN members)
- ❑ Run NCOALink (ncoalink.com), merge/purge and list hygiene products before each mailing.
- ❑ Plan AHEAD – Group your orders. Avoid RUSH jobs.
- ❑ Keep page counts to even signatures (16, 32, 48) or increments (8, 24, 40)
- ❑ Use house paper.

## Capture Attention!



## Targeted Marketing is an INVESTMENT Not a cost...




Overall marketing costs = 15 to 20 percent of income

## TARGET your Marketing!





## One-Column format

**Course Ideas**

**Creating Outdoor Living Area**  
 Create a cozy outdoor haven for reading, entertaining or just kicking back for a relaxing afternoon at home. We will show you how to create that intimate space for your porch or patio with a small or large budget.

**Designing Small Spaces**  
 Convert small, cluttered rooms into inviting, stylish spaces using simple, inexpensive techniques. Together, we will transform living and family rooms, bedrooms, bathrooms, spare rooms, kitchens and study rooms.

**Spanish for Healthcare Professionals**  
 Are you a doctor, nurse, pharmacist or other healthcare professional who handles medical emergencies? This course will help you communicate with patients who only speak a Spanish. Even if you don't speak any Spanish, we will focus on the most common phrases used in a healthcare environment. The course covers basic admission questions, interview about symptoms, pregnancy, pediatric care, heart and lung diseases, genetic care, communicable diseases, drug problems, emergencies, surgery and more.

**Fragile Transients**  
 Paper accessibility is often based in ethics, aesthetics and nearly every other. It is often overlooked when it comes to the infirmated patient. This seminar will include pamphlets, books, magazines, historical documents, diaries, newspapers, photos, print, advertising and short music.

**More difficult to process**

**Too many characters per line – research recommends 66 maximum**

**Limited flexibility for marketing elements**

## Two-Column format

**Course Ideas**

**Creating Outdoor Living Area**  
 Create a cozy outdoor haven for reading, entertaining or just kicking back for a relaxing afternoon at home. We will show you how to create that intimate space for your porch or patio with a small or large budget.

**Designing Small Spaces**  
 Convert small, cluttered rooms into inviting, stylish spaces using simple, inexpensive techniques. Together, we will transform living and family rooms, bedrooms, bathrooms, spare rooms, kitchens and study rooms.

**Spanish for Healthcare Professionals**  
 Are you a doctor, nurse, pharmacist or other healthcare professional who handles medical emergencies? This course will help you communicate with patients who only speak a Spanish. Even if you don't speak any Spanish, we will focus on the most common phrases used in a healthcare environment. The course covers basic admission questions, interview about symptoms, pregnancy, pediatric care, heart and lung diseases, genetic care, communicable diseases, drug problems, emergencies, surgery and more.

**Fragile Transients**  
 Paper accessibility is often based in ethics, aesthetics and nearly every other. It is often overlooked when it comes to the infirmated patient. This seminar will include pamphlets, books, magazines, historical documents, diaries, newspapers, photos, print, advertising and short music.

**Fewer characters per line**

**Best for letter-size brochures**

**Not as space-efficient as three-column for magazine-size brochures**

## Three-Column format

**Course Ideas**

**Creating Outdoor Living Area**  
 Create a cozy outdoor haven for reading, entertaining or just kicking back for a relaxing afternoon at home. We will show you how to create that intimate space for your porch or patio with a small or large budget.

**Designing Small Spaces**  
 Convert small, cluttered rooms into inviting, stylish spaces using simple, inexpensive techniques. Together, we will transform living and family rooms, bedrooms, bathrooms, spare rooms, kitchens and study rooms.

**Spanish for Healthcare Professionals**  
 Are you a doctor, nurse, pharmacist or other healthcare professional who handles medical emergencies? This course will help you communicate with patients who only speak a Spanish. Even if you don't speak any Spanish, we will focus on the most common phrases used in a healthcare environment. The course covers basic admission questions, interview about symptoms, pregnancy, pediatric care, heart and lung diseases, genetic care, communicable diseases, drug problems, emergencies, surgery and more.

**Fragile Transients**  
 Paper accessibility is often based in ethics, aesthetics and nearly every other. It is often overlooked when it comes to the infirmated patient. This seminar will include pamphlets, books, magazines, historical documents, diaries, newspapers, photos, print, advertising and short music.

**Most space efficient for magazine size brochure**

**Most flexible for placement of graphic elements**

**Allows more space to list more courses**

**Extra Blank Column**

Maximize readability with no more than 66 characters per line of text

## Logistics formatting

**Course Ideas**

**Creating Outdoor Living Area**  
 Create a cozy outdoor haven for reading, entertaining or just kicking back for a relaxing afternoon at home. We will show you how to create that intimate space for your porch or patio with a small or large budget.

**Designing Small Spaces**  
 Convert small, cluttered rooms into inviting, stylish spaces using simple, inexpensive techniques. Together, we will transform living and family rooms, bedrooms, bathrooms, spare rooms, kitchens and study rooms.

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 Are you a doctor, nurse, pharmacist or other healthcare professional who handles medical emergencies? This course will help you communicate with patients who only speak a Spanish. Even if you don't speak any Spanish, we will focus on the most common phrases used in a healthcare environment. The course covers basic admission questions, interview about symptoms, pregnancy, pediatric care, heart and lung diseases, genetic care, communicable diseases, drug problems, emergencies, surgery and more.

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 Paper accessibility is often based in ethics, aesthetics and nearly every other. It is often overlooked when it comes to the infirmated patient. This seminar will include pamphlets, books, magazines, historical documents, diaries, newspapers, photos, print, advertising and short music.

**Course Ideas**

**Creating Outdoor Living Area**  
 Create a cozy outdoor haven for reading, conversation or just looking back for a while. We show you how to create that relaxing space for your yard.

**Flex & Fitness**  
 Get the best of both worlds with this combination flexibility and fitness course. Monday sessions will consist of flexibility and stretching routines and will meet 11:30 am-12:30 pm in room 390. The second class day of each week will meet from 9:15 am - 10:45 a.m. in the Fitness Center for aerobic and strength training. Signed waiver is required.

**July 6-September 24 (omit 9/7)**  
 11 Mon, 11:30 a.m. to 12:30 p.m.  
 12 Thu, 9:15 a.m. to 10:45 a.m.  
**Course# 101SHRC1205A**

**July 6-September 22 (omit 9/7)**  
 11 Mon, 11:30 a.m. to 12:30 p.m.  
 12 Thu, 9:15 a.m. to 10:45 a.m.  
**Course# 101SHRC1205B**

**Use accepted abbreviations to condense logistics listings and reduce the number of lines they require.**

**Keep logistical copy on as few lines as possible.**

**Flex & Fitness**  
 Get the best of both worlds with this combination flexibility and fitness course. Monday sessions will consist of flexibility and stretching routines and will meet 11:30 am-12:30 pm in room 390. The second class day of each week will meet from 9:15 am - 10:45 a.m. in the Fitness Center for aerobic and strength training. Signed waiver is required.

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**July 6-September 22 (omit 9/7)**  
 11 Mon, 11:30 a.m. to 12:30 p.m.  
 12 Thu, 9:15 a.m. to 10:45 a.m.  
**Course# 101SHRC1205B**

- Logistics should not dominate content information.
- You can save up to 25% of your space with good presentation techniques for logistics.
- You can provide complete information using accepted abbreviations.
- You will have space to move instructor information to include it with the content description.
- Avoid bold for logistics – it takes up more space and distracts from the title.

**Play with conciseness to save space and save money.**

- Use accepted abbreviations
- Leave off superfluous words (date, time, cost, location etc)
- Place logistics in the order that matters to your customers

Date/time: Tuesdays, May 5-16 from 7:00pm-9:00 pm  
 Instructor: Joan Crawford  
 Location: Community Center Rm 10  
 Cost: \$95

Date/time: Tuesdays, May 5-26 7-9 pm  
 Instructor : Joan Crawford  
 Place: Comm. Center Rm 10 Cost: \$95

Tues May 5-26 7-9 pm \$95  
 Comm Ctr Rm 10 with Joan Crawford

Tu 5/5-26 7-9pm \$95 Comm Ctr Rm 10

\*Add a line within the course description about the instructor rather than just listing a name

**Typography Choices**

- Good text typography is important in relation to what you want to convey with the type style.
- Legibility and readability can be as important as the character of the type.
- Choose a typeface that you're comfortable reading, not one that looks pretty or funny or that catches your eye.
- YOU DON'T WANT THE TYPE TO DRAW ATTENTION TO ITSELF.**

You want the text typography to get out of the way and let the information come through with complete clarity and without taking up extra space.

**Typography Choices**

- Different typefaces take up different amounts of space, even at the same point size.
- Try comparing two fonts next to each other and see how much difference they take up in room.

fop fop

**Typography Choices**

- Weight** of the letters refers to the relationship between the characters and can affect the space required for text.
- Be cautious about making text too "light" for large blocks of copy – it becomes tiring for the eyes.

hh

## Typography Choices

- Capital letter **height** can differ, so can take up more space.

Co Co

## Typography Choices

- Check font for correct **spacing** of the font style

Ke r n i n g  
Kerning

## Typography Choices

### Leading

- General rule is 120-130% of type size
- 10-point type should use 12 or 13-point leading

#### Leading Examples

10/10 These headlines are being given extra prominence, including wide links to page headers, advertisements on social network pages and links to your e-mail sign-up, and making registration beneficial prominently on registration pages and forms. These are consequences that customer will appreciate, and that will help build a perception of quality service for program.

10/12 (default) Many headlines are being given extra prominence, including wide links to page headers, advertisements on social network pages and links to your e-mail sign-up, and making registration beneficial prominently on registration pages and forms. These are consequences that customer will appreciate, and that will help build a perception of quality service for program.

10/14 Many headlines are being given extra prominence, including wide links to page headers, advertisements on social network pages and links to your e-mail sign-up, and making registration beneficial prominently on registration pages and forms. These are consequences that customer will appreciate, and that will help build a perception of quality service for program.

10/16 Many headlines are being given extra prominence, including wide links to page headers, advertisements on social network pages and links to your e-mail sign-up, and making registration beneficial prominently on registration pages and forms. These are consequences that customer will appreciate, and that will help build a perception of quality service for program.

10/18 Many headlines are being given extra prominence, including wide links to page headers, advertisements on social network pages and links to your e-mail sign-up, and making registration beneficial prominently on registration pages and forms. These are consequences that customer will appreciate, and that will help build a perception of quality service for program.

10/20 Many headlines are being given extra prominence, including wide links to page headers, advertisements on social network pages and links to your e-mail sign-up, and making registration beneficial prominently on registration pages and forms. These are consequences that customer will appreciate, and that will help build a perception of quality service for program.

[www.ecofont.com](http://www.ecofont.com)



Uses up to 20 percent less ink and it's FREE!

[www.ecofont.com](http://www.ecofont.com)



## Focus on results and benefits

### Poor Opening Sentences – wrong focus

Course - "The aim of this course is to..."  
or  
"This class will..."

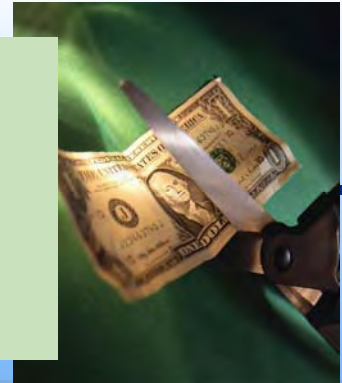
Instructor - "The teacher will explain..."  
or  
"Shirley has been teaching ballet for two years now..."

## What's in it for me?



- ✓ Define clear benefits of participation.
- ✓ Reassure readers about what will be experienced in the class, activity or event.
- ✓ Create interest in knowing more about this opportunity.
- ✓ Address the reader directly with second-person language.

## How can these techniques save me money??



This class focuses on ancient techniques in breathing and meditation to help you achieve balance and control of your primary senses.  
(21 words)

Achieve balance and control of your primary senses using ancient techniques in breathing and meditation.  
(15 words)

This workshop is designed for those who want to enter the highly lucrative business of seminars and professional speaking.  
(19 words)

Enter the highly lucrative business of seminars and professional speaking.  
(10 words)

This class will show you how to find buyers for your inventions.  
(12 words)

Find buyers for your inventions!  
(5 words)

This information-packed seminar includes basic tools, techniques and valuable trade secrets for those who want to start a new, exciting career in special events as well as those who want to create great parties.  
(34 words)

Throw a great party or even start a new, exciting career in special events using the basic tools, techniques and valuable trade secrets from this seminar.  
(26 words)



This series is designed to encourage all women, whether married or single, to become more involved in their own financial decision-making by increasing their knowledge of financial principles and of the many parts of a financial plan.  
(37 words)

Become more involved in your own financial decision-making by increasing your knowledge of financial principles and financial plans – whether you are married or single.  
(24 words)

This one-day class will provide the answers.  
(7 words)

Discover the answers in one day!  
(6 words)

This class focuses on ancient techniques in breathing and meditation to help you achieve balance and control of your primary senses. This workshop is designed for those who want to enter the highly lucrative business of seminars and professional speaking. This class will show you how to find buyers for your inventions. This information-packed seminar includes basic tools, techniques and valuable trade secrets for those who want to start a new, exciting career in special events as well as those who want to create great parties. This one-day class will provide the answers. This series is designed to encourage all women, whether married or single, to become more involved in their own financial decision-making by increasing their knowledge of financial principles and of the many parts of a financial plan.

Achieve balance and control of your primary senses using ancient techniques in breathing and meditation. Enter the highly lucrative business of seminars and professional speaking. Find buyers for your inventions! Throw a great party or even start a new, exciting career in special events using the basic tools, techniques and valuable trade secrets from this seminar. Discover the answers in one day! Become more involved in your own financial decision-making by increasing your knowledge of financial principles and financial plans – whether you are married or single.

### Use feedback from Course Evaluations

Ask:

- “What did you like best about this course?”
- “What could be improved about the course?”



## TARGET your brochure distribution!

Use LERN's Market Segmenting Registration Analysis tools –


They're FREE for LERN members!!



A Carrier Route is a grouping of addresses within a ZIP Code. Normally the demographics of people living in a Carrier Route are similar.

So instead of having to target the whole ZIP Code, you can target the most appropriate Carrier Routes.

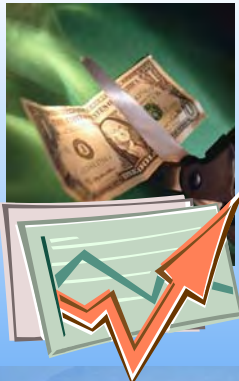




LERN Market Segmenting reports will help you determine the carrier routes and number of catalogs you will need for your mailing to optimize your efficiency.

Give your mailing house a listing of the Carrier Routes you want to target.


They should be able to rent the Carrier Route names, merge the Carrier Route list with your in-house mailing list, and prepare the mailing.



*"Thought you'd like to know that I did my semester to semester comparison and using LERN's model for mailing to the carrier routes of best customers resulted in a 100% increase in income from Fall 08 to Fall 09 - pretty cool!"*

Mary Green  
Kellogg Community College  
Battle Creek, MI

Thank you for attending!



*"Information That Works!"*

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Questions?  
Contact Nancy Hulverson  
at [nancyh@lern.org](mailto:nancyh@lern.org) or  
1-800-678-5376



## LIFELONG LEARNING 2012

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### LERN Software

Greg Marsello  
Vice President  
LERN  
Tiverton, RI



## LERN Software

Washington D.C. Conference 2012  
Greg Marsello

## Data Collection & Analysis

- You must make data-driven decisions.
- Most programs can collect data, but do not have the software tools to analyze the data.
- LERN Tools developed by LERN staff and tested by best practice programs is the solution.

## LERN Tools

- Market Segment Tool: Registration Data
- Program Planner Tool: Open Enrollment Programming Data
- Contract Training Tool: Contract Training Data
- Promotion Tracking Tool: Promotion Data
- Customer Service Tool: Customer Request/Evaluation Management
- Job Performance Tool: Staff Accountability
- One-Year Plan Tool

## FREE!

- LERN Tools are FREE to LERN members.
- LERN does analysis or you can do analysis.
- Contact [info@lern.org](mailto:info@lern.org) for more information.
- Lean on LERN for "Information That Works!"

THANK YOU!



GREG MARSELLO  
[www.lern.org](http://www.lern.org)



## LIFELONG LEARNING 2012

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**Pack More Income and Opportunity  
into Every Contract**

Julia King Tamang  
Consultant  
LERN  
Portland, OR



**Pack More Income and Opportunity Into Every Contract**

Julia King Tamang  
kingtamang@lern.org

**Two simple ways to get more money**

- Add frequency
- Add transactional value

It takes just about as much effort to cut a \$1,000 deal as it does to cut a \$10,000 deal. The more revenue you book on each opportunity, the more money you'll make overall.

**Get a referral**



25% of your business should come from referrals.

**Upsell**

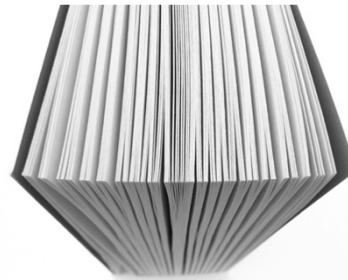


**Cross-sell**



Amazon used this tactic to increase sales 30%.  
"Customers who bought this also bought.."

**Add a deluxe materials pack**



### Add follow-on consulting



### Use this class as a lead in to another



### Time the pitch

- Think “Black Friday” email pitch
- When is the perfect time to offer a discount?

### Create incentives for in-house referrals



### Give customers a say in what you sell

- Use LinkedIn, Facebook, Twitter, etc. and ask, “What other services do you want?”

### Sell a membership



**Leverage your “Thank You” email**



**Give an exclusive offer to a key account**



**Use a “bring us a friend and we’ll give you a deal”**



**Cut your expenses**



**Offer 3 price points**



**Sell the things that net more PROFIT**

- Not more income, more profit



### Make “package deals”

- For example, add a lunch
- Or add consulting and Skype calls
- Or add ALL customized exercises
- Or add ownership of the class

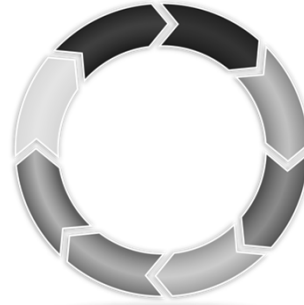
### Focus on STAR clients



### Do “X” and get “Y” free



### Cut your sales cycle time



### Always use “post event marketing”



### Give a discount for two jobs at once



## Raise your price



## Ask for another contact inside the company



## Identify how you're different

- **Feature:** A characteristic or capability that your offering has and other products lack.
- **Brand:** An emotion uniquely tied to your company or offering.
- **Convenience:** Your offering is easier for the prospect to purchase and support than the competitor's.
- **Quality:** Your offering is higher of quality (lasts longer, works better, etc.) than the competitor's product.
- **Commitment:** You're personally more committed to the customer relationship than the competition.
- **Integration:** Your offering works better with products that the prospect has purchased in the past.

## Ask, "What else..?"



Choose 3 small steps to take action in the next two weeks. Start small.

## YOUR PLAN OF ACTION



*Thanks and see you soon!*

kingtamang@lern.org



## LIFELONG LEARNING 2012

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### Social Media 101

Suzanne Kart  
Director of Marketing  
LERN  
Bay City, MI

## Social Media 101

Suzanne Kart, CeP, M.A.

#lern12 @suzannekart

## What we can and can't cover today

- We going to discuss where to start, what platforms you should, and what kind of information you should share on each platform.
- We won't have time to go into how to sign up for accounts, how to post, etc.

#lern12 @suzannekart

## If you need help with how to sign up for social media accounts, etc...

- LERN has started doing "tutorial" webinars that shows you how to do this.
- We have one for Pinterest and one for Facebook already and we're planning on more.
- Those two are archived already and you can gain access by emailing [info@lern.org](mailto:info@lern.org).

#lern12 @suzannekart

## One more thing to remember...

- Most social media sites follow the same format to register



## The goal of social media

- Engage our key constituents in a two-way conversation.
- Make them feel connected to our organizations so they want to continued the relationship.

#lern12 @suzannekart

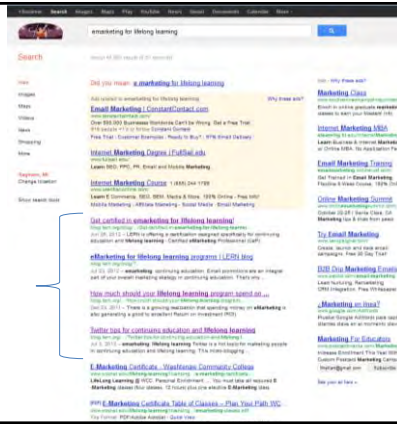
## It also helps with Search Engine Optimization (SEO)

- People online are confused. If they have a question that we have the answer to, we want them to find us.
- All search engines use social media signals (how current your content is, the frequency to which you get linked to) in their ranking processes
- 78% of Internet users do product research online\*
- 89% of Americans search the Internet before making a purchase\*
- When they search for eMarketing for lifelong learning, I want them to find LERN.

#lern12 @suzannekart

\* Inbound 2012, Gary Vaynerchuck

## And they do find LERN



## The first rule of social media marketing

- It's the same as the first rule of marketing – know your audience.
- Therefore, all the platforms I discuss today may not be appropriate for your program, depending on who is your audience.

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## What platforms should we focus on?

- Top 3 most used social media sites are Facebook, Twitter, and Pinterest\*
- The sheer number of people who interact with these sites make them a marketing force that cannot be ignored.
- Two other networks that are a must are LinkedIn and YouTube.

\*Direct Marketing News, April 6, 2012

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## Facebook



- Overwhelmingly the most visited site.
- Even my dad is on Facebook – and he's 73

## Two ways to post to Facebook

- As an individual account
  - People agree to be your “friend” and you share information back and forth
- As a fan page
  - You set up a page for your organization that people can “like.”
  - Those people will then receive updates from your fan page when you post there, but you will not see their information like a friend would.

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For an organization, a fan page is best

## How to get people to “like” you

- Offer relevant content often
  - Links
  - Pictures
  - Videos
  - Information that is fun and interesting so that when someone one comes to your page they know you’re offering great content.

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## Other ways to get people to “like” you

- Put a “like” button on your website
- Ask questions
- Use polls
- Publish in the early morning (stories published in the early morning or just before bed have higher engagement)
- Let fans post to your page
- Comment on your fans post (even something as simple as “Thanks for sharing” tells fans your paying attention to them.)
- Create a contest
- Offer exclusive discounts

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## Twitter

- Twitter is a form of micro blogging. People – or programs – sign up and are able to follow the posts of other users.
- Users post updates that are 140 characters (Which comes to about 2-3 sentences).

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## Twitter is a broadcast medium with a reply function

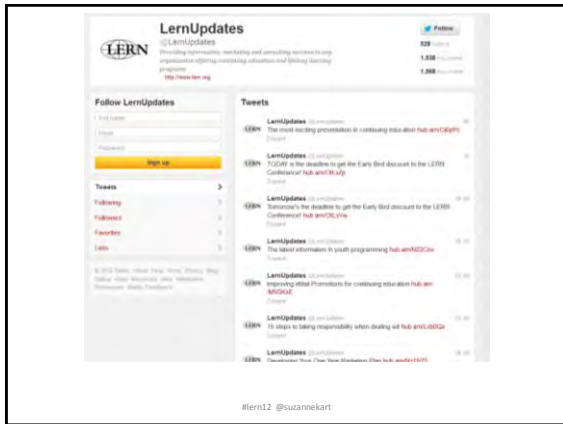
- People can use Twitter just to update friends about their day – or Twitter can be used to send business, political or other information to people who want to hear from you.
- You can’t just push your sales message, because your followers will stop following you. You can tweet sales messages, as long as you tweet other information, too – information that’s of interest to your followers.

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## Here are some ideas for using Twitter:

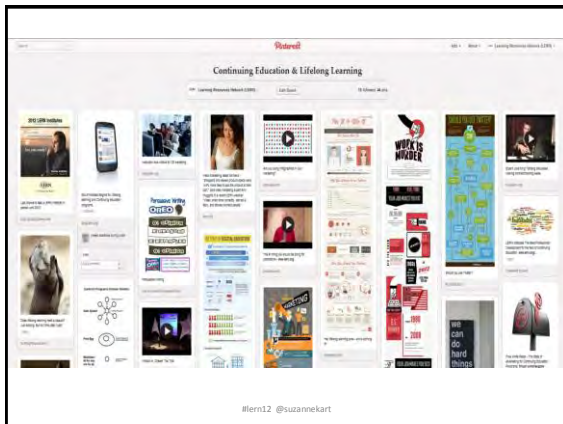
- Articles
- Retweets
- Announcements
- Information about people involved in your program
- Tweets about new blog posts

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## Pinterest

- The hottest new social networking site is Pinterest.
- It made big news earlier this year when it increased its unique visitors by 155% in just one month, from December 2011 to January 2012.



## What exactly is Pinterest?

- Pinterest is a new form of social networking, too. It allows users to “pin” images or video to boards that they set up.
- The boards have a common theme.
- It also allows users to comment on other user’s pins and repost them.

## Who’s on Pinterest?

- Users on Pinterest are predominantly female (68%) and the majority are age 54 and younger (89%).
- The growth of Pinterest means that it’s going to be a powerful force for marketers – if it’s used correctly.

## Here are some tips for getting started on the right track:

- Use strong visual content. Whatever you are trying to promote needs to be linked through an engaging visual that others will want to re-pin and share with their connections.

## Infographics and charts get results.

- We're seeing more and more social media users share infographics in lieu of just data. Pinterest is the perfect place to get out the visual interpretations of your data.

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## Promote your catalog

- Promote your catalog by sharing a screenshot of the cover. Reusing the visual not only creates a consistent message, it also reinforces in the mind of your customers the images associated with your program.

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## Promote your blog posts

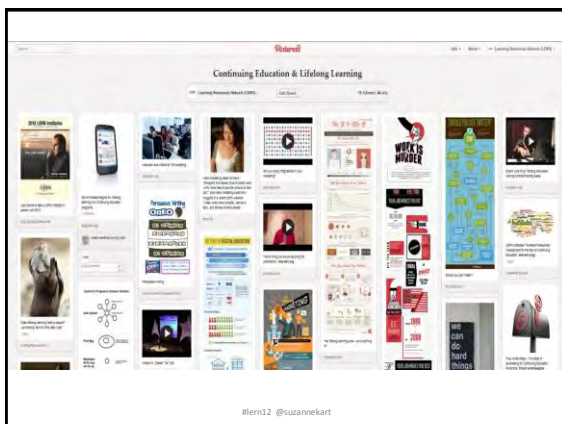
- Promote your blog posts. Every blog post you create should have an eye-popping visual to accompany it. You can post that visual to Pinterest and it links back to your blog.

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## Put a "Pin-it" button on your website

- Put a "Pin-It" button on your website. Most websites already have buttons for social media sites like Facebook, Twitter, and LinkedIn – and now is the time to add one for Pinterest.

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## LinkedIn

- LinkedIn is a business-oriented social networking site that is used by millions of professionals.
- It's not only a place to post a job or a resume, but also to start discussions, join groups of people who are interested in a specific topic, and share information.

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## Other ways you can use LinkedIn

- To promote your blog.
- To stream your Twitter feed.
- Update the status of your recent work.
- Research prospects – or even potential employees.
- Share articles with your connections.

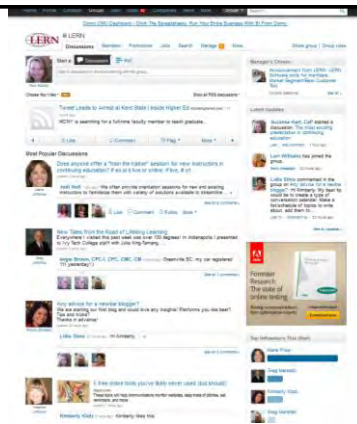
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## Here's what a LinkedIn news feed looks like



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## Here's a group in LinkedIn



## YouTube

- More than 75% of American adults watch videos on YouTube. According to the YouTube website, their traffic is as follows:
  - Over 800 million unique users visit YouTube each month
  - Over 3 billion hours of video are watched each month on YouTube
  - 72 hours of video are uploaded to YouTube every minute
  - 70% of YouTube traffic comes from outside the US
  - YouTube is localized in 43 countries and across 60 languages
  - In 2011, YouTube had more than 1 trillion views or around 140 views for every person on Earth

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## A credible search engine

- YouTube is now also a credible search engine where people are both searching for and uploading content.
- As a marketing tool, it's a great format to highlight case studies as well as showing your audience the kind of products and services you're offering.

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## Content

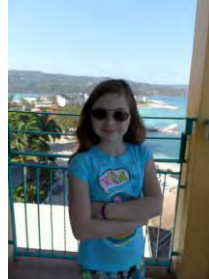
- There are many types of content that can be shared on YouTube including:
  - Webinars
  - Invitations to events (think movie trailers for your event)
  - Clips of your presenters and instructors

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#lern12 @suzannekart

## It's also where the kids are ...



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- Meet Isabela Kart
- She prefers YouTube to TV
- She has taught herself video production first by watching YouTube tutorials, then by uploading her own videos to her own YouTube channel.

## Here's Isabela's YouTube channel



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## The marketing implications of Isabela's YouTube usage

- People born into the information age use the Internet to seek out information, to figure out how to do things, and into interact.
- Isabela may be 11, but in 10 years she'll be 21. She's already a lifelong learner, so if she's not in your target audience now (i.e. Kids College), she will be in 10 years.
- And she's very typical for a girl her age.

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## One more thing to learn from Isabela

- As adults, we often fear sharing content because we grew up in a world where:
  - Using other people's content was called plagiarizing.
  - We could be accused of cheating on term papers for simply not citing a reference correctly.
  - There was no Internet for us to publish our own work on.

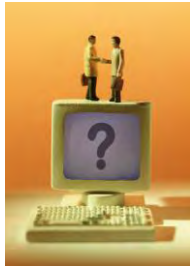
#lern12 @suzannekart

## One of the most frequent questions I get on social media is will I get in trouble for sharing content online.

- I'm going to allow Isabela to answer this one

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## Questions?



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## Thank you!

- Suzanne Kart
- [kart@lern.org](mailto:kart@lern.org)
- Connect with via social media at [suzannekart.com](http://suzannekart.com)



#lern2012 @suzannekart



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# Your One-Year Marketing Plan

Paul Franklin  
Consultant  
LERN  
Portland, OR

*Your One-Year  
Marketing Plan*

Lifelong Learning 2012  
Presented by Paul Franklin



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*The Three Most Essential  
Marketing Practices To Do*

1. Think Marketing
2. Have a Written Plan
3. Everyone Executes Plan



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*Why You Need a  
One-Year Marketing Plan*

- ✖ Financial pressures and increased accountability and competition mean you can't afford to "just do it".
- ✖ Increased capability of technology, staff and other resources have changed the game.
- ✖ Two to five year plans focus on long term fixes and new initiatives while a one-year plan focuses on action and today's customers.

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*A One-Year Marketing Plan...*

- ✦ Is a blueprint for action
- ✦ Is more than dates, numbers and dreams
- ✦ Integrates all the different aspects of your organization
- ✦ Must involve all staff in creation
- ✦ Must be used by all in planning and acting
- ✦ Provides benchmarks and guidelines

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*One-Year Marketing Plan  
Timeline*

- ✦ Start 6 months prior to the start of your next fiscal/program year
- ✦ The Plan should be complete and approved 3 months prior to the start of your next fiscal/program year
- ✦ End-of-Year Report to be completed 3 months after the completion of your fiscal/program year



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*Whose Role is it to  
be the Marketing Leader?*



CEO/DIRECTOR



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### *One-Year Marketing Plan Format*

- ※ Unit “Big Ticket” Goals for the year
- ※ Annual Budget & Benchmarks
- ※ Division Goals
  1. Operating Margin Budgets
  2. Benchmarks 2. new vs. old
  3. Course/contract goals, including new vs. old
  4. Market Segments
  5. Delivery strategies
- ※ By Session/Quarter
- ※ Promotion Strategy
- ※ Timeline
- ※ Staff Responsibilities

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### *Unit Goals*

- Major goals set to improve overall unit performance
- No more than five, but can add as you go
- Examples:
  - Re-design website for market segments
  - Mail catalog 3 times to best customers
  - Saturate top carrier routes
  - Focus e-mail blasts on courses for market segments

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### *Unit Budget & Benchmarks*

※ Budget		
– Income	\$300,000	100%
– Promotion	\$45,000	15%
– Production	\$135,000	45%
– Direct Costs	\$180,000	60%
– Operating Margin	\$120,000	40%
– Administration	\$105,000	35%
– Net	\$15,000	5%

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*Unit Budget & Benchmarks*

✱ Benchmarks

01. New Products	20%
02. Operating Margin	40%
03. Cancellation Rate	15%
04. Staffing Productivity	\$125,000
05. Program Divisions	8
06. Participant Evaluations	4+
07. Repeat Rate: OE	35%
08. Repeat Rate: CT	50%
09. Customer Surveys	6
10. Brochure:Participant Ratio	50:1

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- Division Goals*
- A. Income - Operating Margin Budgets per Unit/Division
  - B. Total Events to be Offered per Unit/Division
  - C. Division Benchmarks
  - D. Course/contract goals
  - E. Specific Market Segments to be Targeted

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*Division Benchmarks*

<b>OE</b>	<b>CT</b>
Cancellation Rate	Cancellation Rate
New Course/Events	New Products/Services
Quality Score	Quality Score
Repeat Rate	Repeat/Referral/Cold
Promotion:Reg Ratio	Lead: Contract Ratio
Average Participants	Average Contract Price

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*By Session/Quarter*

- A. Income per Session/Quarter
- B. Total Events per Session/Quarter
- C. New vs. Old Events per Session/Quarter
- D. Specific Market Segments to be Targeted per Session/Quarter

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*Promotion Strategy*

- ✳ Promotions to be Developed: Catalogs, Brochures, Flyers, eMarketing Advertisements, Sales Kits, PR
- ✳ Distribution Strategies: Mail, Street, Radio, TV, online, salespeople
- ✳ Retention Strategies: Tracking, Newsletters, Benefits, Gimmicks

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*Timeline*

- ✳ Production/Promotion Schedule
  - A. Production/Promotion Start Date
  - B. Information Prepared by Date
  - C. Promotion to Printer Date
  - D. Promotion Distribution Dates
  - E. Other Promotion Strategy Dates, including E-mail production and distribution dates
  - F. Event Start/Date

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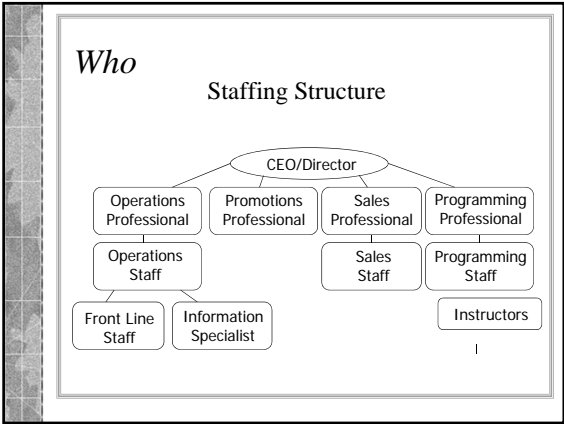
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- ### *Monitoring One-Year Plan*
- ✧ Session/quarterly financial updates
  - ✧ Session/quarterly benchmarks updates
  - ✧ Session/quarterly meeting
    - Goals
    - Finances and benchmarks
    - Timelines

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- ### *End-of-Year Report*
1. Unit Goals Performance
  2. End-of-Year Finances: budget & actual
  3. Promotion Timeline: on-time report
  4. Promotion Performance: Ratios and ROI 
  5. End-of-Year Statistics: unit & division 

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### *A Strategy ffor Sanity*

- ✦ Think out three years and plan for one.
- ✦ Set reasonable goals for your first effort.
- ✦ Set aside more time for the first effort.
- ✦ Involve staff so they are committed.
- ✦ Create your own benchmarks.
- ✦ Make the plan vital... refer to it frequently.
- ✦ Celebrate victories.

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# Good Luck!

[franklin@lern.org](mailto:franklin@lern.org)



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### Got Humor?

Fred Bayley  
Consultant  
LERN  
Forest City, NC

**GOT HUMOR?**  
FRED BAYLEY, [WWW.KITELINE.COM](http://WWW.KITELINE.COM)

THERE ARE JUST 4 CONCEPTS TO TAKE AWAY FROM THIS WORKSHOP, BESIDES THE CHUCKLES AND LAUGHS ...

1. HUMOR RELATES

2. HUMOR COMES IN STYLES

3. TAKE THINGS LIGHTLY

4. HUMOR SHOULD INVITE



## Fun Quiz

Version 7.1

Assess your fun IQ. Chuckle, laugh, or smile as you answer these questions.

8-10	Number correct	Yep, You're pretty darn smart!
6-7		Not quite smart enough, but it'll do
4-6		I bet you'll study next time
less than 4		Geez Louise, Next time copy off of your neighbor's paper

1. Where is the only place in the world, where Friday comes before Thursday?
2. If you have only one match and enter a room where there was an oil lamp, an oil heater and some kindling wood, which would you light first?
3. What is full of holes – yet can still hold water?
4. What do you call a pig that does karate?
5. What's the difference between an old ten-dollar bill and a new one?
6. Which word does not belong in the following group? (A) Knife (B) Swan (C) Smile (D) Feather (E) Lovely (F) Thought
7. How many penguins does it take to fly an airplane?
8. If the Vice President of the United States should die, who would be President?
9. In which hand is the Statue of Liberty's torch?
10. What do you call Santa's helpers?



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### How to Escape the Stuff of the Past

Julia King Tamang  
Consultant  
LERN  
Portland, OR



**HOW TO ESCAPE THE STUFF FROM THE PAST**

Julia King Tamang – LERN – 2012 Annual Conference  
kingtamang@LERN.org

The kinds of things that stick

**1**

**Deep wounds**

KINDS OF STUFF TO ESCAPE

The kinds of things that stick

**2**

**Attachments**

KINDS OF STUFF TO ESCAPE

The kinds of things that stick

**1**

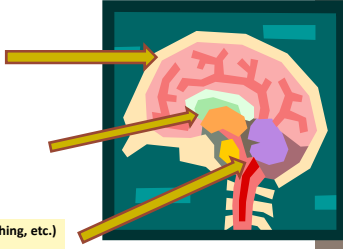
**Deep wounds**

KINDS OF STUFF TO ESCAPE

**Stuff accumulates, both intentionally and unintentionally**

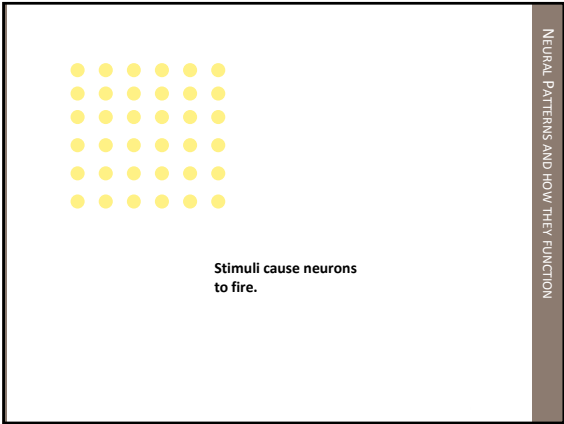


**And when it does, it's recorded in the body and the mind**

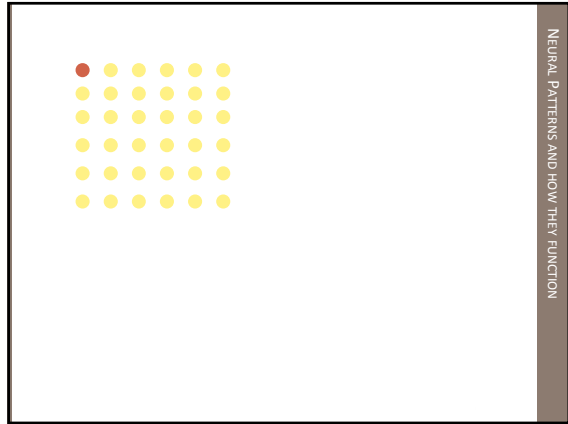


- NEOCORTEX**  
reasoning – consciousness  
will – meaning
- LIMBIC SYSTEM**  
Emotion – sensory relay  
bodily impulses
- BRAIN STEM**  
Autonomic functions (breathing, etc.)  
coordination – arousal

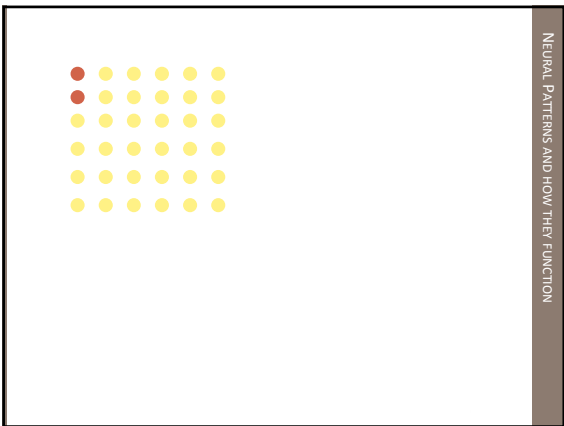




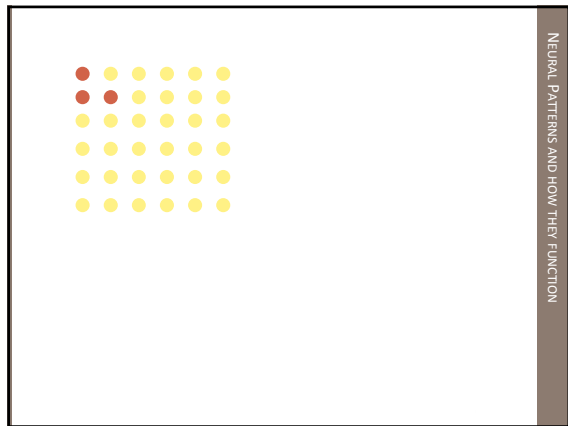
NEURAL PATTERNS AND HOW THEY FUNCTION



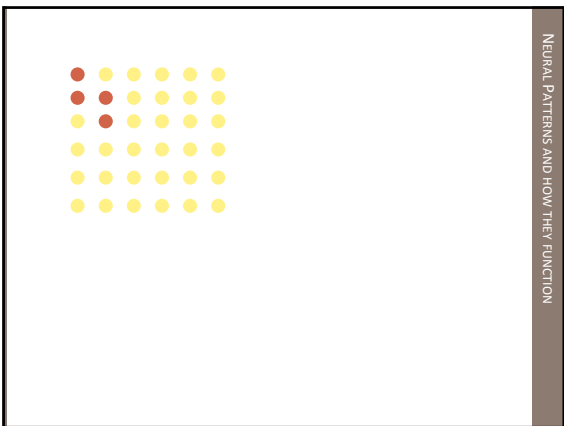
NEURAL PATTERNS AND HOW THEY FUNCTION



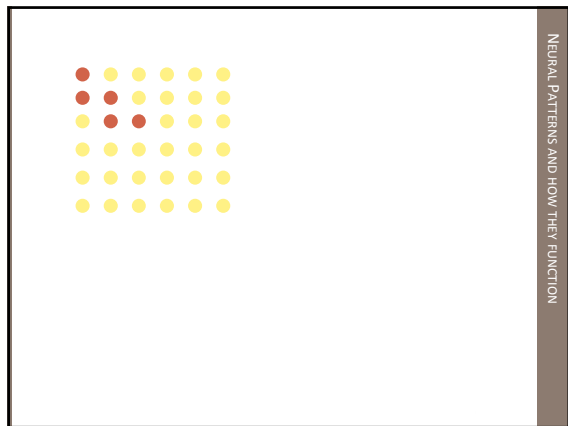
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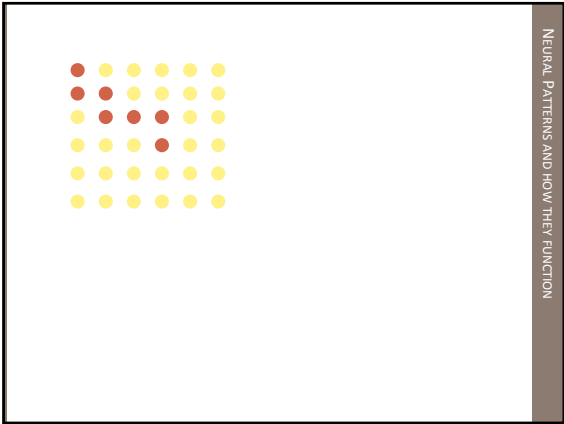
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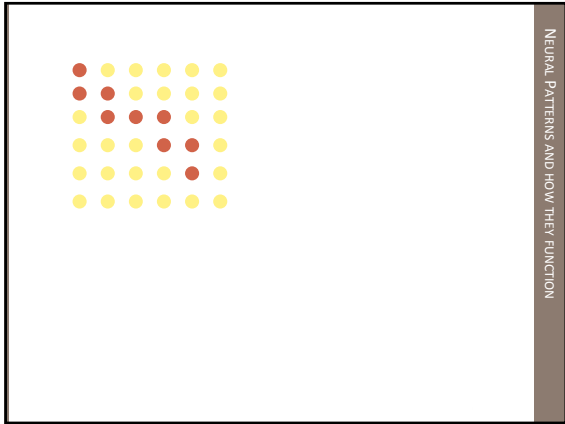
NEURAL PATTERNS AND HOW THEY FUNCTION



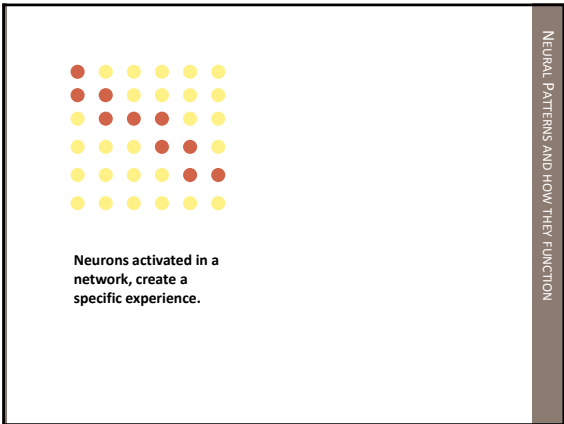
NEURAL PATTERNS AND HOW THEY FUNCTION



NEURAL PATTERNS AND HOW THEY FUNCTION

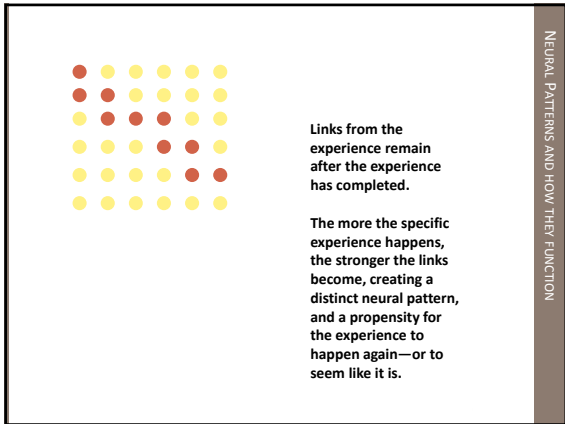


NEURAL PATTERNS AND HOW THEY FUNCTION



NEURAL PATTERNS AND HOW THEY FUNCTION

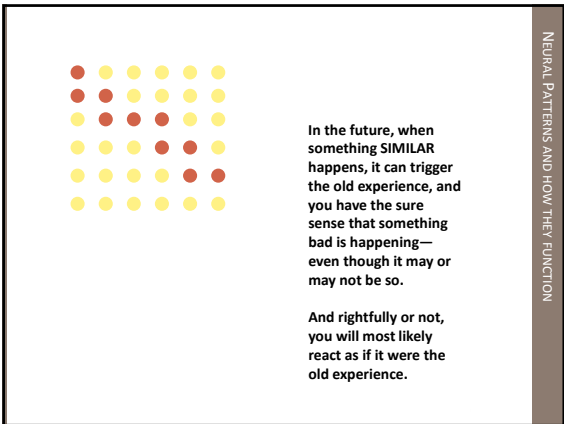
Neurons activated in a network, create a specific experience.



NEURAL PATTERNS AND HOW THEY FUNCTION

Links from the experience remain after the experience has completed.

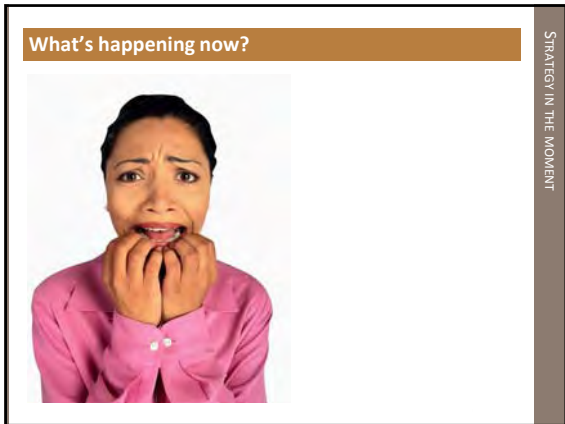
The more the specific experience happens, the stronger the links become, creating a distinct neural pattern, and a propensity for the experience to happen again—or to seem like it is.



NEURAL PATTERNS AND HOW THEY FUNCTION

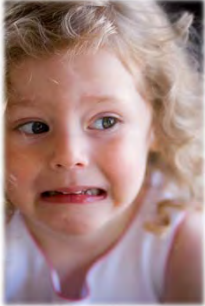
In the future, when something **SIMILAR** happens, it can trigger the old experience, and you have the sure sense that something bad is happening—even though it may or may not be so.

And rightfully or not, you will most likely react as if it were the old experience.



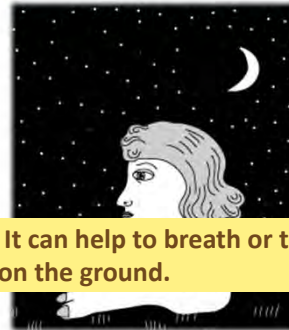
STRATEGY IN THE MOMENT

Is this a present experience, or something from my past?



STRATEGY IN THE MOMENT

If it's a **past** experience, first ground yourself



It can help to breathe or to notice your feet on the ground.

If it's a **past** experience, ask

Are things OK now?

What's happening right now?

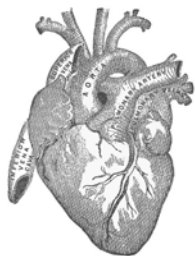
What would I LIKE to happen?

STRATEGY IN THE MOMENT

This will help to wire a new neural pattern.  
*It will take repetition and patience. It might even take support.*



There's always the possibility of forgiveness



Forgiveness does not mean you were wrong.

Forgiveness does not mean anyone else was right.

To forgive means that you understand that by holding on to the past, you bring the wound into the present, and that you no longer choose to do that.

STRATEGY IN THE MOMENT

Forgiveness means giving up the hope for a better past.

STRATEGY IN THE MOMENT

If it's a **present** experience, ask

**What's happening?**  
**What do I want?**  
**What am I willing to do?**

STRATEGIES IN THE MOMENT


The kinds of things that stick

**3**

**Attachments**

KINDS OF STUFF TO ESCAPE

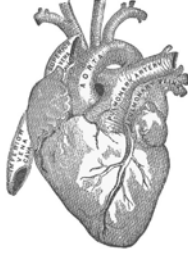
First you have to see it.. So start looking. It's fun.



What are you hanging on to?

GET TO KNOW YOUR ATTACHMENTS

Hanging on is a choice...but it can also be a strong habit, and hard to change, so be **gentle** with yourself.

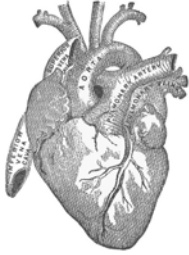


But the hanging on itself can make us sad, if what we're grasping is not available.

We will try every possible strategy, even with no evidence whatsoever that they will actually work.

GET TO KNOW YOUR ATTACHMENTS

3 false beliefs that will cause attachments and the resulting suffering

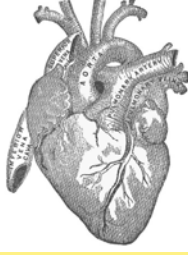


Believing you can make something impermanent permanent.

Believing that you are not connected to everything else.

Believing that your wanting will ever be satisfied.

We hang onto things we think will make us happy.



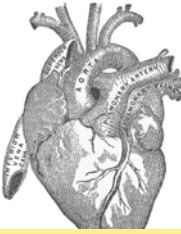
But the hanging on itself can make us sad, and that's the part that IS in our control.

We will try every possible strategy to not let go, even with no evidence whatsoever that they will actually work.

**Kinda crazy, huh!**

GET TO KNOW YOUR ATTACHMENTS


**Seeing your attachments becomes a joy**



Without seeing you are carried away.  
 Without seeing you are a victim.  
 Without seeing you are imprisoned by your attachments.

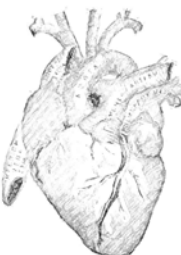
**Seeing, though maybe painful, creates a moment of choice!**

**What need are you trying to fulfill?**




Worthiness	Independence
Safety	Appreciation
Respect	Solitude
Belonging	Fairness
Joy	Honesty
Affection	Dignity
Love	Creativity

**Taking responsibility for what you need**



This is what's happening for me  
 And so I am feeling...  
 Because I have a need to feel...  
 Would you be willing to...


**And if you can't get satisfaction that way**



See how holding on is hurting you  
 Understand that you think it will make you happy, but see that it is not.

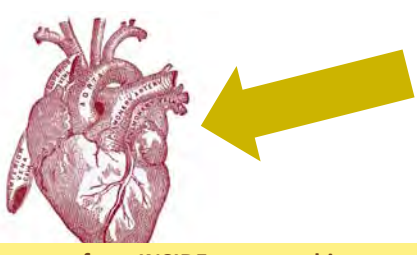
**Ask yourself, "Do I want more of THIS?"**

**Taking responsibility for what you need**



What's happening?  
 What am I feeling?  
 Because I have a need to feel...  
 Would you be willing to...

**Do you know where your happiness comes from?**



**It comes from INSIDE you, not things outside. Take back your power to be happy.**



## LIFELONG LEARNING 2012

NOVEMBER 16 - 18, 2012 › WASHINGTON, D.C.

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### Passion and Purpose: Keeping the Vision Alive

Rita Martinez-Purson  
New Mexico University  
Albuquerque, NM

**PASSION AND  
PURPOSE:  
KEEPING THE VISION  
ALIVE**

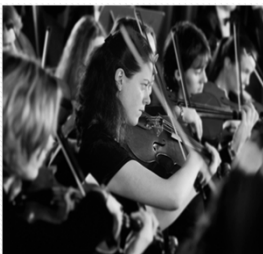
Dr. Rita Martinez-Purson  
Dean Emerita, University of  
New Mexico  
Assistant Dean, University of  
Arizona

**RESILIENCE:**

The ability to  
weather and  
spring back  
from periods of  
stress and  
change.



**RESONANCE**



▶ The sounds  
produced by a  
body vibrating in  
sympathy with a  
neighboring  
source of sound.

**RESONANT LEADERS**

- ▶ Manage their emotions well and read individuals and groups accurately.
- ▶ Consciously attune to people
- ▶ Focus teams on a common cause
- ▶ Build a sense of community

*Richard Boyatzis and Annie McKee, Resonant Leadership*

**RESONANT LEADERS**

- ▶ ***Create a climate that enables people to tap into passion, energy and desire to move together in a positive direction.***

**STUDIES SHOW**

- ▶ The way people feel about the climate of an organization can account for nearly 30% of business performance.

▶ *Richard Boyatzis and Annie McKee, Resonant Leadership*

## EMOTIONS ARE CONTAGIOUS

We are wired to pick up clues from each other, and are dependent on each other for our emotions.



## EXAMPLE: COLLEEN BARRETT, SWA

We are in the customer service industry. We just happen to fly planes.  
- SWA employee



## PERSONAL COMPETENCE STARTS WITH SELF-AWARENESS



- ▶ Emotional self-awareness
- ▶ Accurate self-assessment
- ▶ Self-confidence
- ▶ Social competence

## EMOTIONAL INTELLIGENCE: SELF MANAGEMENT

- ▶ Emotional self control
- ▶ Transparency
- ▶ Adaptability
- ▶ Achievement
- ▶ Initiative
- ▶ Optimism



## EMOTIONAL INTELLIGENCE: SOCIAL COMPETENCE

- ▶ Social awareness:
  - ▶ Empathy
  - ▶ Organizational Awareness
  - ▶ Service
- ▶ Relationship Management:
  - ▶ Inspirational Leadership
  - ▶ Influence
  - ▶ Developing Others
  - ▶ Change Catalyst
  - ▶ Conflict Management
  - ▶ Building Bonds
  - ▶ Teamwork and Collaboration

## THE SACRIFICE SYNDROME

- ▶ Energy and Effort for Self-Control
- ▶ Add a crisis or two



- ▶ High Alert
- ▶ Chronic Stress





## BECOME AWARE OF NOT BEING AWARE

- ▶ Tune in to the Wake Up Calls



## MINDFULNESS

- ▶ Being awake, aware, and attending



## HOPE

- ▶ Engages and raises our spirits



## COMPASSION

- ▶ Deep understanding, concern and willingness to act on that concern



## MENTAL MODELS

- ▶ Don't believe everything you think



## RECONNECTING WITH PURPOSE

- ▶ The quest for purpose and can only be found in a deeper connection with spirit.
- ▶ Take time daily to reconnect with that part of yourself.



## THE RELAXATION RESPONSE



- ▶ Meditation
- ▶ Prayer
- ▶ Yoga
- ▶ Tai Chi
- ▶ Jogging
- ▶ Repeating a sound, word, prayer, movement

## Intentional Change

Real Self Strengths Weaknesses	Learning Agenda Experiments with new behavior Mastery	Ideal Self
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## LIFELONG LEARNING 2012

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### **Nine Shift for 2013: The Great American Comeback**

William Draves  
President  
LERN  
River Falls, WI

# Nine Shift: Work, life and education in the 21<sup>st</sup> century

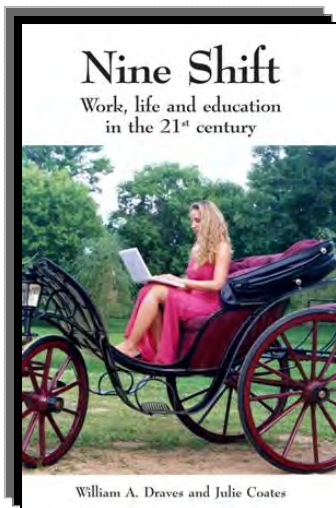
In just 20 years, between 2000 and 2020, some 75% of our lives are changing dramatically. We know this because it happened once before. Between 1900 and 1920, life changed.

The parallels between today and 100 years ago are uncanny. Each of the major nine shifts that Coates and Draves predicted are currently taking place.

The implications of each shift for work, life and education are profound.

And the practical changes needed for emerging leaders to respond to the 21<sup>st</sup> century are increasingly apparent and necessary. This is an exciting time.

William A. Draves is co-author with Julie Coates of the book [Nine Shift](#), and is President of the Learning Resources Network (LERN). William A. Draves has been called a “world class speaker” by Maureen Geddes, Vice President of the Ontario (Canada) Speakers Association. Phil Housel of Kerrville Texas, says, “I’d trample my grandma to hear Draves speak.”



“Fascinating reading.” – *Peter Day, Global Business reporter, BBC*

“Not since John Naisbitt’s *Megatrends* has a book hit the mark so clearly.” – *American Institute of Architects*

“Nine Shift is mind blowing.” – *Philip Badman, CityLit, London, UK*

“A most interesting book.” – *Peter F. Drucker, internationally famous business guru*

**BLOG: CHECK OUT THE LINK TO OUR WEEKLY WEBLOG OF NEWS AND TRENDS AT [WWW.NINESHIFT.COM](http://WWW.NINESHIFT.COM)**

# About *Nine Shift*

*Nine Shift: Work, life and education in the 21<sup>st</sup> century* outlines the changes society is going through from the Industrial Age of the 20<sup>th</sup> century to the Internet Age of the 21<sup>st</sup> century.

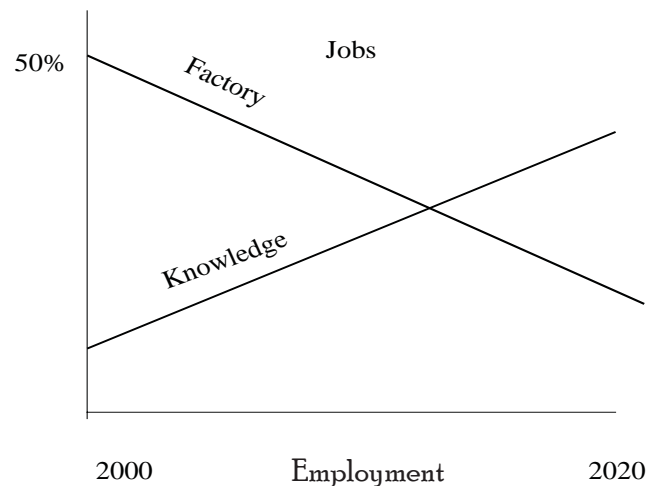
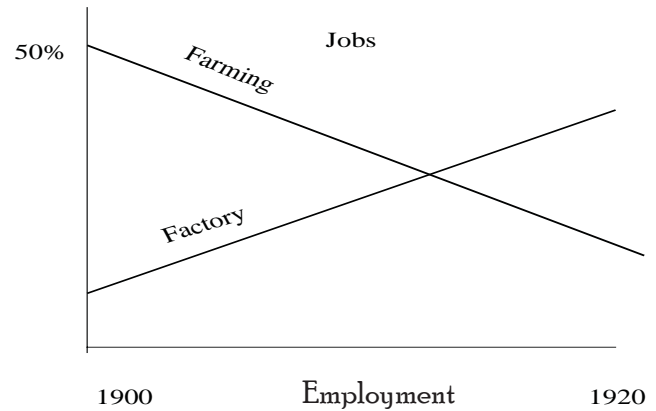
While the events and outcomes are different, the forces and processes are exactly the same as the transition 100 years ago from the Agrarian Age of the 19<sup>th</sup> century to the Industrial Age of the 20<sup>th</sup> century.

By looking at what happened 100 years ago, we can understand what is happening today, and what will happen tomorrow.

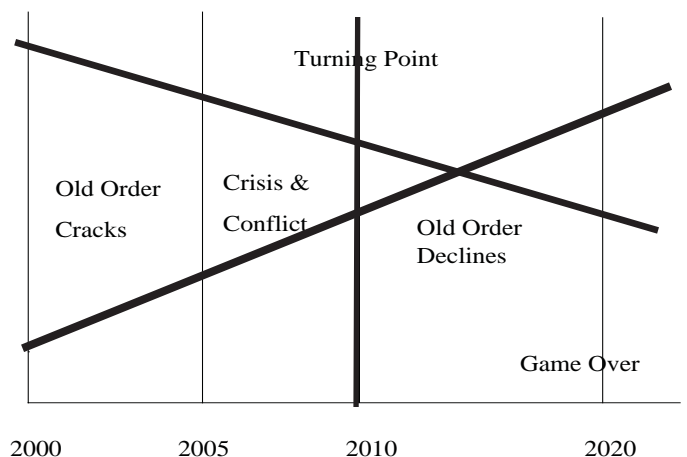
The critical time periods are 1900-1920 and 2000-2020.

The nine major shifts that are occurring between 2000-2020 are:

1. People work at home.
2. Intranets replace offices.
3. Networks replace pyramids.
4. Trains replace cars.
5. Dense neighborhoods replace suburbs.
6. Inequality is addressed. "The rich get poorer."
7. Boys lead a change in values.
8. Half of all learning is online.
9. Education becomes web-based.



Source: *Statistical Abstract of the U. S., 1996, National Data Book, p. 410*



**Nine Shift:** Work, life and education  
in the 21<sup>st</sup> century  
by William A. Draves and Julie Coates  
302 pages, paperback, © 2004  
\$20 plus \$6 shipping

[www.NineShift.com](http://www.NineShift.com)

# Lifelong Learning 2013

November 21 - 23, 2013

(Preconference Seminars: Nov. 20)

San Francisco, CA

Learning Resources Network



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