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**Benefits Planning
Assistance & Outreach (BPA&O)**

2001 LEADERSHIP DEVELOPMENT WEBCAST SERIES

Developing Strategic
Marketing Plan
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ped CORNELL

Program on Employment and Disability
School of industrial and Labor Relations
Cornell University, Ithaca, New York

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DEVELOPING MARKETING PLANS TO EXPAND OPTIONS

Marketing to Expand Options

Benefits Planning, Assistance and Outreach Projects (BPA&O) and Protection and Advocacy for Beneficiaries of Social Security Projects (PABSS) are a new and important part of the Ticket to Work and Work Incentives Improvement Act work incentives infrastructure. These services, coupled with other provisions outlined in the Act, provide an important network of supports to assist beneficiaries and recipients of Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) in making informed choices about preparing for, attaching to and advancing in employment.

Given the newness of this infrastructure, even though some awarded agencies and organizations have been providing similar supports prior to the passage of the Work Incentives Improvement Act, it is important for projects to assess the extent to which they are currently marketing their services and supports and their effectiveness in this area. Marketing is an important tool in the practitioner's tool belt for expanding options and intentionally increasing impact.

There are five basic strategies and steps to effective marketing:

1. Understanding the skills and expertise you bring to the field.
2. Understanding your agency's goals, objectives and services in relation to this field.
3. Understanding what you are setting out to accomplish and with whom you will accomplish it.
4. Putting a plan into action.
5. Measuring outcomes achieved and overall satisfaction with services and supports provided.

Understanding Yourself Your Agency

To assist you in identifying a baseline of services and supports a Self-Assessment/Agency Assessment checklist is provided in Appendix A. Each job function is broken down by major responsibilities. First, identify whether the assessment instrument is being completed for an individual or agency. Second, reviewing each item, check whether:

- Activity/service/support is provided
- If not provided, referral can be initiated for activity/service/support
- Expertise is evident to conduct function
- Expertise needs to be further developed
- Frequency of activity/service/support
- Duration of time allocated to activity/service/support

This assessment can serve as an important tool in helping the practitioner to understand their baseline of skills; helping the agency to identify services available and fill gaps; and, enhance the competency and expertise of staff currently providing these services and supports and quality of the same.

Reviewing the self-assessment checklist, identify those areas where further skill development was needed. Write those specific skills in need of development and brainstorm with the group potential goals and objectives that could enhance that specific area. For example:

Skill:	Managing a case load
Plan: a.	Pair up with a mentor
b.	Gather information from a case manager in a community agency
c.	Participate in Case Load Management 101 at the community college

SKILL   **PLAN**

1.

2.

3.

4.

Completing this assessment process will help you learn as an individual where your specific skills and expertise are; the products and services you and/or your agency provide; and begin to design an initial plan for enhancing your current baseline. Using the self-assessment information collected, a profile should be developed outlining the extent of BPA&O/PABSS services provided and placement of those services. The next step in developing the plan requires a thorough environmental analysis.

Understanding the Environment —
Mission Analysis

To conduct a comprehensive analysis of the environment in which you live and work, information must be collected in three areas:

- mission analysis
- resource analysis
- marketing analysis (Stakeholder Analysis – Appendix B.)

What is our mission?

1. What is our primary business?

2. Who re our customers? (See Stakeholder Analysis)

3. What needs are we trying to meet?

4. What are our products and services? (See Self/Agency Assessment)

5. What do we want to be in the future?

The Role of Feature–Advantage–Benefit Marketing in Establishing Mutual Gains

As reflected in the Self/Agency Assessment, an array of services and supports may be offered by a particular individual or agency to varying degrees. As referenced in the earlier analysis an important element is further refining what your primary products and services are. This will be further broken down later into specialized services and products for secondary markets in the marketing analysis section.

Understanding the features, advantages, and benefits or services and supports you deliver is essential to establishing mutual gains.

Feature	Advantage	Benefit
What the service is	*What it can offer*	*What it can do for the customer*

For example, a feature of your program may be benefits profiling/screening. The advantage is that it offers the individual being served an opportunity to comprehensively profile their current financial status. A benefit would be that it affords the customer a picture of their current situation against which to gauge different employment scenarios prior to decision-making.

Take a few moments to outline a few features of services you and/or your agency provide related to benefits planning and assistance, making sure to outline the advantages and benefits.

	Feature	Advantage	Benefit
1.			
2.			
3.			
4.			

Keep in mind one feature may have several advantages and benefits. In turn, these may inadvertently prove an advantage and benefit to secondary markets as well.

Understanding Your Resources	**What are our resources?** 1. What are our strengths? 2. What are our weaknesses and constraints? 3. What unique resources do we have available to us? Personnel? Track-record? Location? Contacts/Networks? Image? 4. What information, data, or records are available to us for customer research?
Understanding Your Marketing Situation	**What trends are impacting us?** 1. Environment — What are the major trends affecting our business and our customers? Economic? Political? Technological? Socio-cultural?

2. How are the above items problems and/or opportunities?

3. Who are the public we serve? (See Stakeholder Analysis)

4. What are our "target" markets? (See Stakeholder Analysis)

   Primary:

   Secondary:

5. What market segments exist? (Specific services for specific customers see "Matching" section below)

6. What is our "position" in the market place? (What is different about your service from that of other providers?)

Important Stakeholders

Critical to expanding options are several important stakeholders, including: individuals with disabilities, their families, their service providers, their advocates, their planners, their supporters, and SSA.

Beneficiaries and Recipients with Disabilities

The core of a practitioner's network is the beneficiaries and recipients who require benefits planning and assistance services and supports. Rapport and trust are the important elements of relationship building with this group. Past successes will further expand this network. Negative or unsuccessful experiences may pose an obstacle as to how others will perceive the services and supports provided.

Family Members

As with beneficiaries and recipients, their family members are another prime stakeholder to invest as part of the practitioner's network. As important as the trust and rapport built is the extent to which the practitioner "listens" to needs, concerns and fears expressed by family members. In some cases, benefits received by the individual may in part support the financial well being of the person's immediate family. Investment and information sharing with this group is essential and may play another large role in expanding the practitioner's network.

Advocates

Advocates are broadly defined to include: peer counselors, independent living personnel, legal representation, due process representatives, and others charged with defending, supporting or advocating on behalf of the beneficiary or recipient. The savvy practitioner will understand the significance this group has as part of an effective network. While most would agree the beneficiary or recipient is the practitioner's primary customer, they do have secondary customers, which may include funders of their services. Here we begin to outline a struggle that may potentially exist as practitioners define their role in providing advocacy-related support. It is important to be aware of the impact advocacy may have on secondary customers, especially when providing counsel to individuals on actions they may need to take. An effective network would include linkages and relationships with and advocates within the geographic area being targeted affording, affording the practitioner a greater opportunity to refer the beneficiary and/or recipient in cases where potential conflict of interest may exist.

Service Providers

This is an important stakeholder group for practitioners, providing the services and supports that their customers may need but that they are not able, or equipped, to provide. This would include: employment networks, residential programs, providers of community rehabilitation services, state agencies, workforce investment councils, and other groups with specific areas of expertise. It is not expected that the practitioner be an expert in all areas, but that when the case arises, they have the ability to network their customers with those that do (e.g. rehabilitation counseling, vocational assessment, supported employment, community living, etc). This group is also an important consumer of information and training that the practitioner may make available as well as an important referral source.

Planners/Case Managers

Planners and case managers are another important stakeholder group to invest in the benefits planning and assistance process. Often, beneficiaries and recipients are already attached to another service delivery system. Whether it is state vocational rehabilitation, the mental retardation and developmental disability system, or the mental health system, these individuals probably already actively participate in some sort of formal service delivery planning process, which is outlined in a planning document. Planners and case managers, besides being another potential referral source, may also play a key role in establishing long-term benefits planning and assistance supports. As the designers of individualized service delivery plans they have the ability to integrate goals and objectives concerning benefits management that may result in the individual's long-term success.

Support Personnel

Support personnel are those individuals in a beneficiary/recipient's lives that have specific roles and responsibilities in supporting the person on a regular basis. These people are important members of the practitioner's network as they are providers of reliable qualitative information as to what is going on in the individual's life, where support needs exist, and potential safety net strategies. This group would also benefit from information and resource sharing and serve as a potential referral source.

SSA

Last but not least, SSA is a vital partner. The effective practitioner will maintain close relations and connections to both their local, state, and regional SSA office. Locally, they can establish important relationships and reporting protocols with claims representatives and employment support representatives (ESR). At the state level they can keep abreast of proposed changes coming down the road and maintain relationships with PASS Specialists and ESRs. At the regional level they can learn about other effective practices and regional rollout of special demonstrations and events.

Benefits planning and assistance is about establishing partnerships that enhance the self-sufficiency and economic wellness of beneficiaries and recipients while at the same time supporting their employment interests.

Stakeholder Analysis

Exercise

Working with a small group from your agency or by yourself, conduct a Stakeholder Analysis. This is another important step in developing a broad marketing plan for benefits planning and assistance services and supports. This will help you identify whom your network and other stakeholders, who need to be brought into the fold.

The Stakeholder Analysis is provided in Appendix B.

Strategies for Network Building

There are several ways to expand personal and professional networks within your community and geographic area being served.

1. Research agencies and schools through advertising, trade journals and newspapers
2. Become familiar with the array of services, supports and products available within your community targeted to individuals with disabilities
3. Research local needs and trends
4. Find out who decision makers are in specific stakeholder groups you are targeting
5. Participate in broad array of functions and activities offered around the human services community

6. Join/participate in human services coalitions/consortia

7. Tap into existing networks you maintain to secure advice and recommendations for broadening network

8. Talk to other divisions or agencies and schools you or your agency does business with or intersects frequently

9. Seek referrals from everyone – let your community know what you are attempting to do and how you can help

10. Offer secondary services and products to members of your network

11. Develop and disseminate informational materials including fact sheets, brochures and cover letters using both direct mail and Internet applications, such as listservs, to get your message out into the community

12. Enhance education and human interest through face-to-face contact. Participate in events such as college fairs and job fairs and provide community education programs/presentations

13. Secure references from existing members of your network and past satisfied customers

Provide media releases of successes and stories of human interest

Important Step in Developing a Network

Creating Mutual Gains

As network members are beginning to be recruited, it is important to answer some preliminary questions to begin establishing mutual gains--an approach that employs the identification of mutual interests to resolve differences and establish common ground. This includes:

- Identifying what the end-result benefit is to both parties
- What potential problems our collaboration may be able to resolve
- Why someone would want this
- How this might help both parties or individuals being served gain recognition, self-esteem, or a better quality product
- How the other party or individuals being served might enjoy greater profit; and/or,
- How future crisis may be avoided.

Establishing Trust

Establishing trust and rapport with an individual or stakeholder group is a human variable that must be addressed. The effective practitioner can accomplish this in several ways. First, being available is an important and often underrated trait. In this age of e-mail, voice mail, and automated phone answering systems it can often be difficult to connect with another human being. Positioning yourself as accessible and available to your network will ultimately result in being relied on

as a consistent mechanism for information and other services. In our age of quality management initiatives it can't be emphasized enough the role that "What I can do for you" v. "What can you do for me" can play in building trust and establishing rapport. When attempting to establish trust the practitioner should never err on the side of over-promising what they can deliver. Establishing success stories up front and securing references and recommendation will go a long way in others building trust and confidence in your services and supports.

Building Collaboration

Building collaboration and making community connections is critical to expanding benefits planning and assistance networks. For the most part, connections with others will increase opportunities to: build on a community's strengths; provide for the whole person; increase potential for survival and growth; and potentially improve cost-effectiveness.

Factors that impede connections:

- Fear of putting the people we serve at risk possibly because we may need to give up some responsibility; we feel we know the person best; it won't get done unless we do it ourselves
- Easier to just do it yourself
- No history of coordination or bad history
- Needs are immediate
- Little knowledge of available services, goals, operations
- Able to operate independently
- Turf issues and pride
- Always done it this way
- Don't have the time

Factors that foster connections:

- Recognition and sensitivity to differences
- Understanding each person's and agency's goals, operations and services
- Complementary goals with similar values and philosophy
- Voluntarily entered relationships
- Support from management
- Scarce resources and fostered interdependency
- Mutual gains established
- Mutual planning
- Frequent opportunity for information exchange
- Capacity for data management and sharing of outcomes
- Well organized and intended connections
- Gradual implementation
- Ongoing evaluation of outcomes of connections

Maintaining an Effective Network

As a garden, a network is only as effective as the amount of time put into nurturing it. To simply have a list of agencies and individuals on a piece of paper is not enough. The practitioner needs to intentionally foster planned intersections with their network--regular points in time when either information and resources are shared, updates are provided, or other activities are planned that are essential to the livelihood and wellness of the network. A log for recording stakeholder contacts is an important tool. It not only provides a record of who the practitioners have been in contact with but also the topic and potential outcomes. This contact log will prove useful in several areas:

- Tracking outreach activities
- Tracking short-term advisement, technical assistance, or problem solving
- Tracking marketing activities
- Logging community training
- Documenting networking activities

Matching Stakeholders to a Menu of Available Services and Supports

As important as identifying essential stakeholders is understanding their unique service and support delivery needs. While most practitioners will be primarily concerned with meeting the benefits planning and assistance and/or protection and advocacy needs of beneficiaries and recipients, the successful practitioner will also understand that there may be separate products or services that secondary customers may require and benefit from.

For example, a local supported employment provider may have an interest in providing informational materials to new customers referred to them for service on how employment may impact benefits. It might be to the practitioner's benefit to work with that agency to craft a flyer that briefly explains impact and serves as a referral tool for future benefits planning and assistance.

Meeting Needs of a Network

Exercise

Using the template provided below, excerpt three stakeholders from your initial stakeholder analysis and identify potential secondary products or services. This should not include your primary services of screening, benefits advisement, or benefits management.

Customer	Product and/or Services
1.	•
	•
	•
	•
	•
	•
2.	•
	•
	•
	•
	•
	•
3.	•
	•
	•
	•
	•
	•

Strategic Plan Development, Implementation and Evaluation

Information from steps one and two guide the development of a strategic plan. A strategic plan should include several elements:

- What is to be accomplished with goals and objectives
- Specific person(s) responsible for each step
- Timeframe for implementation
- Outline of resources to be used
- Indicators of success for measurement
- Strategies for how plan will be modified if desired outcomes were not achieved

Once implemented, a quality plan will provide specific guidance as to how the plan's effectiveness should be evaluated. Focusing on several variables:

- Did it accomplish its purpose?
- Did it impact specific areas identified?
- Were the methods used the ones proposed?
- Was the outcome of the plan consistent with agency objectives?
- If the desired outcomes were not achieved, what's next?

Final Thoughts

A strategic marketing plan should not just outline new target markets, services and products. It should also clearly define how services and products will continue to be enhanced and improved; how staff providing services will continue to be developed; how ongoing assessment and programmatic evaluation will be conducted; and the role that customer feedback will play into this continuous quality improvement process.

Appendix A:

BPA&O Self Assessment Checklist

Appendix A —
BENEFITS PLANNING AND ASSISTANCE SELF-ASSESSMENT CHECKLIST

Benefits Planning and Assistance Self-Assessment Checklist						
Individual ☐ Agency ☐ School ☐						
OUTREACH						
Activity/Service/Support	Provided	Referral Available	Expertise Evident	Needs Develop-ment	Freq.	Duration
Conduct outreach to key stakeholders						
Information sharing on SSA-related issues with stakeholder groups						
Identify individuals and cultivate SSA-related expertise to expand network						
Establish collaborative relationships with relevant agencies and organizations						
Market services and supports among external stakeholders and process owners						
Negotiate aspects / purpose of referral						
Contract and monitor services and supports with outside vendors						
Other:						
Other:						
INFORMATION AND REFERRAL						
Activity/Service/Support	Provided	Referral Available	Expertise Evident	Needs Develop-ment	Freq.	Duration
Outline specific services and supports that can be provided						
Establish a referral network of practitioners						
Refer for additional needed services and supports as appropriate						
Refer for protection and advocacy						
Monitor case status						
Ensure confidentiality of information						
Provide short-term technical assistance and training						
Share information regarding SSA-related issues across stakeholder groups						
Other:						
Other:						

COUNSELING						
Activity/Service/Support	**Provided**	**Referral Available**	**Expertise Evident**	**Needs Develop- ment**	**Freq.**	**Duration**
Utilize array of data collection and information gathering strategies						
Formulate effective questions and probing for information						
Verify / triangulate information collected						
Facilitate person-focused planning						
Define roles, responsibilities, and counseling functions/supports needed						
Create supportive environment and build rapport and trust						
Network customers for assistance with employment planning, career development, disability adjustment or other specialized counseling areas						
Use repertoire of general counseling skills as needed including						
Other:						
Other:						
DATA COLLECTION						
Activity/Service/Support	**Provided**	**Referral Available**	**Expertise Evident**	**Needs Develop- ment**	**Freq.**	**Duration**
Conduct critical interviewing						
Identify and document personal demographics						
Collect and describe information pertaining to individual's disability						
Develop profile of individual's financial / benefit status						
Assess and identify current work status						
Identify current attachment to service delivery systems						
Identify other critical stakeholders						
Compile information into a comprehensive profile						
Other:						
Other:						
BENEFITS ANALYSIS						
Activity/Service/Support	**Provided**	**Referral Available**	**Expertise Evident**	**Needs Develop- ment**	**Freq.**	**Duration**
Review stated employment goals and/or request for short-term technical assistance or education						
Conduct analysis of information contained in the benefits profile or information requested						

BENEFITS ANALYSIS CONTINUED						
Activity/Service/Support	**Provided**	**Referral Available**	**Expertise Evident**	**Needs Develop-ment**	**Freq.**	**Duration**
Apply different benefit scenarios to study impact and effect of future earnings on benefit status						
Identify long-term benefit planning and assistance support an individual may need						
Identify existing service delivery systems and plans in which long-term benefits planning and assistance supports can be incorporated						
Explore individual's past success/failure in self-managing benefits						
Identify needed safety nets to minimize risk and fears						
Evaluate services and supports provided across each primary domain considering information obtained to continuously improve deliverables						
Other:						
Other:						
SCENARIO ADVISEMENT						
Activity/Service/Support	**Provided**	**Referral Available**	**Expertise Evident**	**Needs Develop-ment**	**Freq.**	**Duration**
Provide short-term technical assistance pertaining to specific scenarios being explored						
Provide education and training as requested						
Disseminate print information as requested						
Develop a comprehensive report for consideration as part of the career development and employment process						
Recommend long-term benefit planning and assistance support an individual may need						
Show how benefits planning and assistance supports can be infused within existing service delivery systems and plans						
Develop and/or recommend self-management tools and strategies for managing benefits						
Recommend potential safety nets to minimize risk and fears						
Support the individual and their key stakeholders in understanding the report and defining next steps						
Provide counseling support to assist the individual in making an informed choice as to options and goals to pursue						

SCENARIO ADVISEMENT CONTINUED						
Activity/Service/Support	**Provided**	**Referral Available**	**Expertise Evident**	**Needs Develop-ment**	**Freq.**	**Duration**
Inform the individual, their key stakeholders and their support teams as to touch points they will need to be sensitive to						
Other:						
Other:						
BENEFITS MANAGEMENT AND PLANNING						
Activity/Service/Support	**Provided**	**Referral Available**	**Expertise Evident**	**Needs Develop-ment**	**Freq.**	**Duration**
Assist the individual, their key stakeholders, and their support teams in making informed choices and establishing goals						
Evaluate and understand the array of service delivery plans that may be intersecting and dissecting the individual's life and provide assistance in incorporating benefits management goals						
Ensure that a comprehensive support / employment plan has been developed						
Maintain case recording and documentation						
Negotiate conflict and establish mutual gains						
Assess, evaluate and inform on touch point issues regarding SSI						
Continue to inform the individual, their key stakeholders and their support teams as to touch points						
Manage case load responsibilities						
Monitor case progress						
Evaluate effectiveness of services and supports provided						
Other:						
Other:						

Appendix B:

Stakeholder Analysis

The following analysis is being completed for an: ☐ Individual   ☐ Agency

Stakeholder Analysis				
Beneficiaries and Recipients				
Existing Network				
Stakeholder Group	**How Accessed**	**When Accessed**	**Satisfaction Level**	**Area for Improvement**
Network Development				
Stakeholder Group	**Outreach Plan**		**Timeframes**	**Mutual Gains**

Stakeholder Analysis

Family Members

Existing Network

Stakeholder Group	How Accessed	When Accessed	Satisfaction Level	Area for Improvement

Network Development

Stakeholder Group	Outreach Plan	Timeframes	Mutual Gains

Stakeholder Analysis				
Service Providers				
Existing Network				
Stakeholder Group	**How Accessed**	**When Accessed**	**Satisfaction Level**	**Area for Improvement**
Network Development				
Stakeholder Group	**Outreach Plan**		**Timeframes**	**Mutual Gains**

Stakeholder Analysis

Advocates				
Existing Network				
Stakeholder Group	**How Accessed**	**When Accessed**	**Satisfaction Level**	**Area for Improvement**

Network Development			
Stakeholder Group	**Outreach Plan**	**Timeframes**	**Mutual Gains**

Stakeholder Analysis				
Supporters / Direct Line Workers				
Existing Network				
Stakeholder Group	**How Accessed**	**When Accessed**	**Satisfaction Level**	**Area for Improvement**
Network Development				
Stakeholder Group	**Outreach Plan**		**Timeframes**	**Mutual Gains**

Stakeholder Analysis

SSA				
Existing Network				
Stakeholder Group	**How Accessed**	**When Accessed**	**Satisfaction Level**	**Area for Improvement**

Network Development			
Stakeholder Group	**Outreach Plan**	**Timeframes**	**Mutual Gains**