

Welcome!

Identifying, Reaching, and Recruiting
Participants

Opener 1

- Develop a jingle, slogan, poster, or billboard
- Use chart pad (optional)
- Complete in 7 minutes
- Be prepared to present to the large group

Opener 2

- Work with your group to convince me to “buy” participation in your **AFI Project**
- Complete preparation in 7 minutes
- Use chart pad (optional)
- Be prepared to present--you will have 1 minute

Purpose of the Session

- Provide a methodology for identifying and describing your project's target markets and developing an efficient and effective promotional plan to reach and recruit members of your target markets.

Objectives of the Session

1. Define marketing and relate it to your Project
2. Explain and apply the marketing mix
3. Define recruitment and explore reasons some AFI Projects have struggled in this area
4. Explain and apply a seven-step process for developing a recruitment plan
5. Explain key relationships among AFI time limits, retention, and recruitment

Objectives of the Session (continued)

6. Identify and describe target markets and market segments
7. Differentiate between applying eligibility criteria and targeted recruitment
8. Differentiate between features and benefits
9. Construct benefit-centered messages
10. Describe five promotional strategies, tactics for each, and those most effective to reach target markets
11. Use two methods to evaluate recruitment plan efficacy

Marketing

- Marketing is planning to have the **RIGHT PRODUCT** in the **RIGHT PLACE** at the **RIGHT TIME** for the **RIGHT PEOPLE**.
- What does “RIGHT” mean?



Marketing (continued)

- Is the AFI Project designed right?
- Is it accessible and available?
- Is it offered at an acceptable price (absence of direct or indirect costs)?
- Is it communicated effectively?
- Is it marketed at the times and places people will hear it?
- Is it designed and delivered for the right group(s)?

Marketing Process for IDA Projects

- Identify **TARGET MARKET (TM)** - assets, needs, and wants
- Design **PRODUCT & SERVICES** to meet needs of TM
- Determine a **PRICE** acceptable to TM
- Provide product & services in a **PLACE** accessible to TM
- **COMMUNICATE** about the products & services in ways, times, and places that reaches TM

Recruitment

- Marketing communications planned to get people informed and interested in your program so they will enroll (buy).

Recruitment (continued)

- Why have some AFI Projects had difficulties recruiting participants?

AFI Project Time Limits & Recruitment

- Review the information regarding recruitment and AFI Project time limits. With your group, answer the following:
 - Do people enrolling in years 2 & 3 have enough time to acquire the asset? Can they finish all of the other requirements, e.g., financial education, asset education, credit repair, others?
 - What are the implications for your recruitment activities?
 - How would communication about your program in year 3 potentially be different from your marketing communications during start-up, years 1 & 2?

Golden Rule of Account Design

Minimum monthly deposit

+

Match during the savings period

=

Account holders with funds likely to be sufficient to
acquire their selected asset

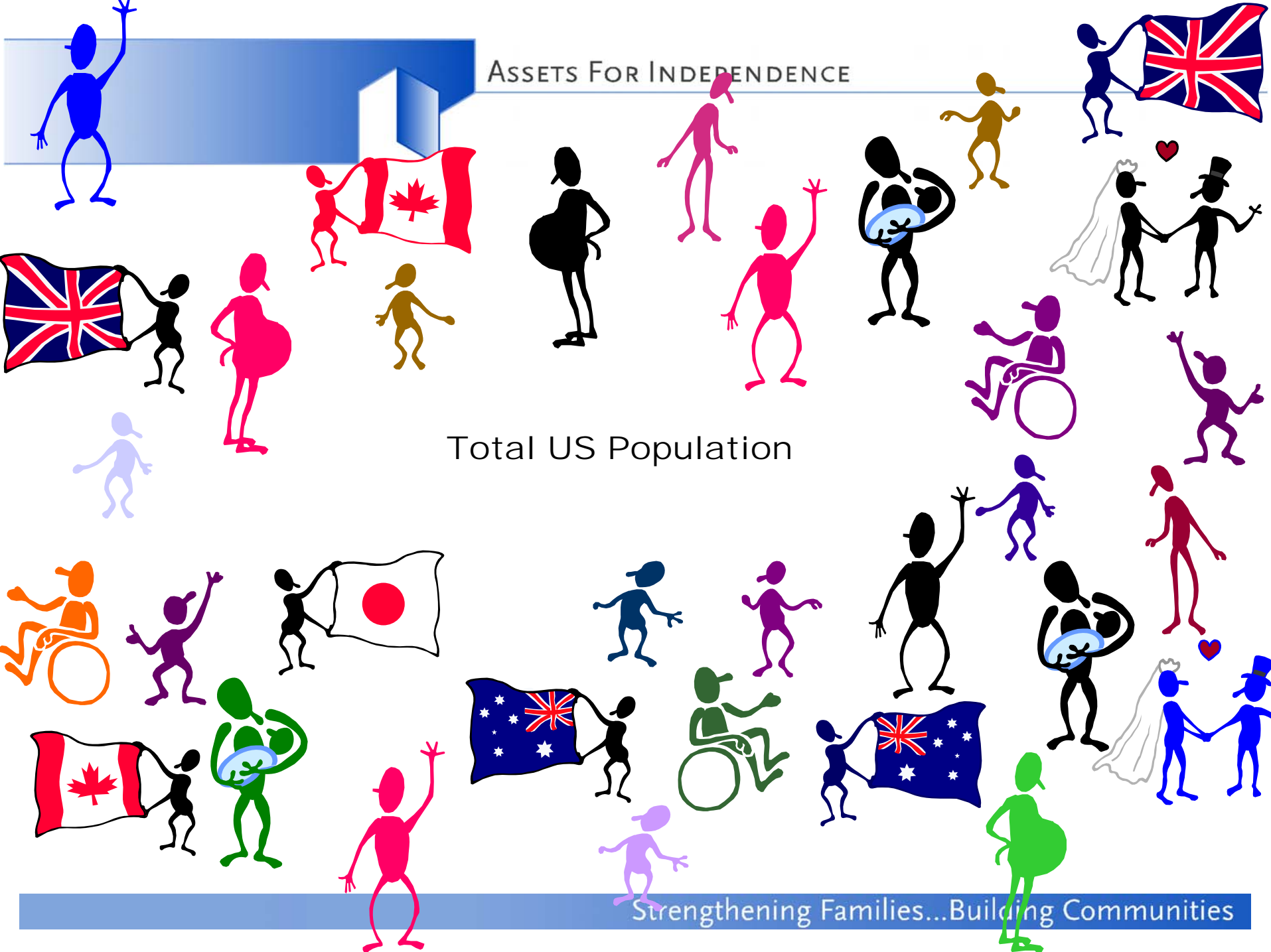
7 Steps to a Recruitment Plan

1. Understand target markets
2. Set recruitment objectives
3. Determine features & benefits
4. Develop messages
5. Plan how to promote
6. Implement
7. Evaluate

Target Markets

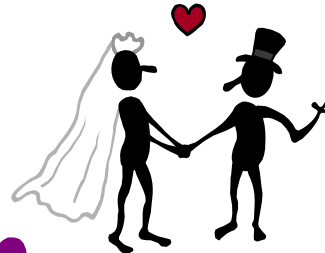
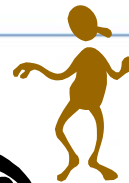
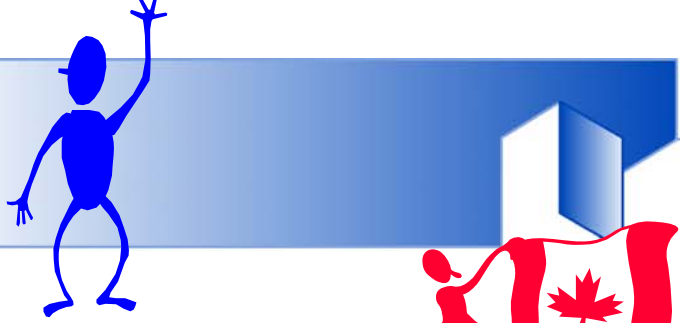
- What is a market?
- What is the market for AFI Projects?
- What is a target market?

ASSETS FOR INDEPENDENCE

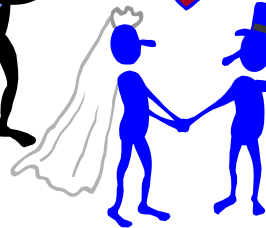
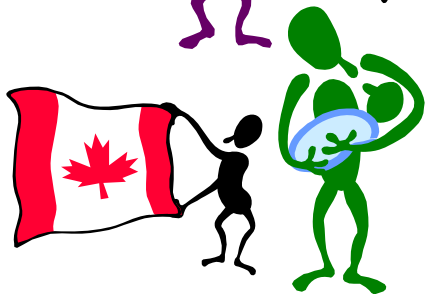
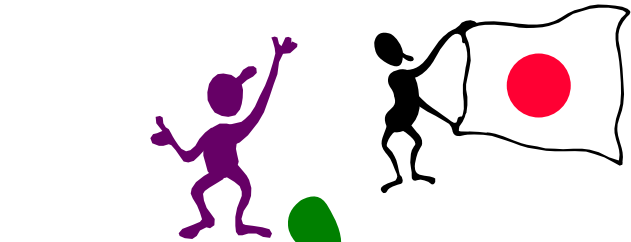


Total US Population

ASSETS FOR INDEPENDENCE

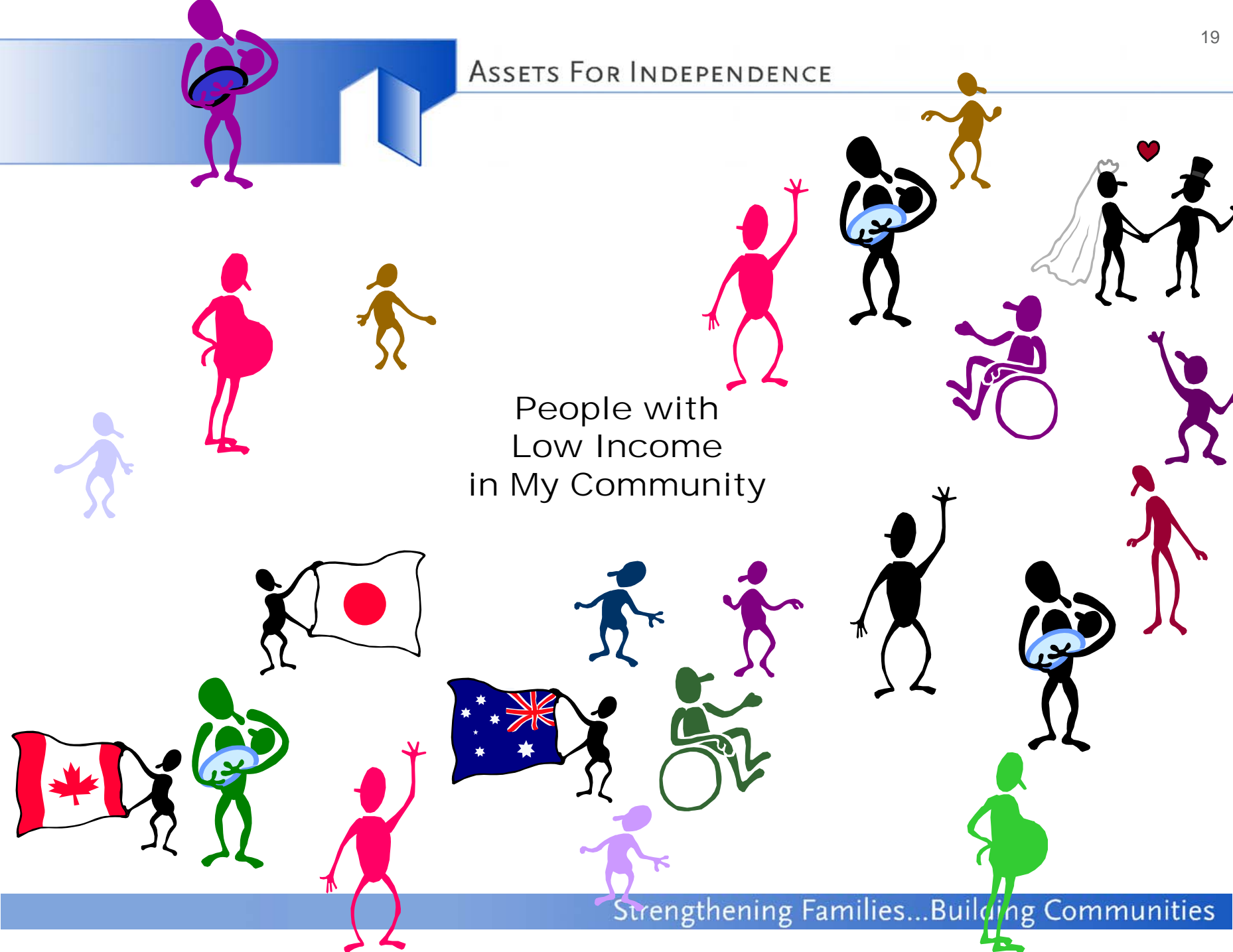


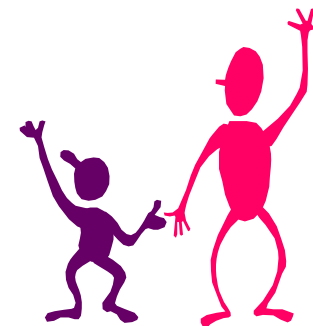
People with Low Income



ASSETS FOR INDEPENDENCE

People with
Low Income
in My Community





People with Low Income in My Community Who Are Survivors of Domestic Violence



AFI Eligibility

- TANF Eligible in Their State
OR
- Household Adjusted Gross Income of 200% of Poverty or Less; or Qualifying for Earned Income Tax Credit;
AND
Household Net Worth < \$10,000, excluding home and one vehicle
- IDA savings deposits must come from earned income.

Target Market Analysis Worksheet

- Demographic Information
- Economic Information
- Target Market Analysis

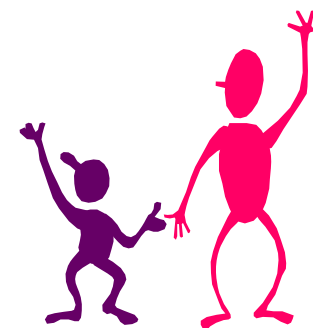
Market Segmentation

- Use of Services
- Response to Marketing Communications



People with Low to Moderate Income in My Community Who Are Survivors of Domestic Violence



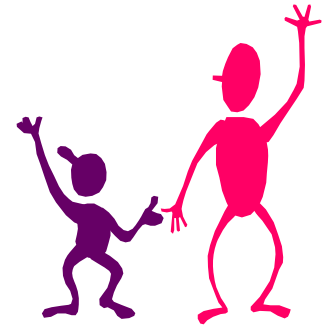


Who Are Living in Transitional Housing
or Shelters



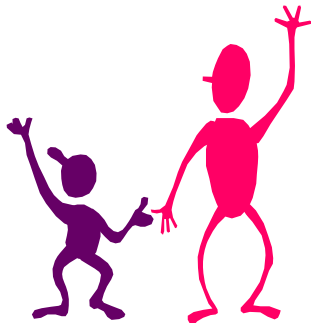


Who Have Children





Who Speak Primarily or Only Spanish



Recruitment Objectives

- What is the overall goal of recruitment?
- What is your overall recruitment goal?

Recruitment Objectives (continued)

- Specific
- Measurable
- Achievable
- Results-oriented
- Time-bound

- Not about **HOW**, but **WHAT** you hope to achieve. The plan is the **HOW**.

Recruitment Objectives: An Example

GOAL: 165 account holders for the IDA Program
(average 27-30 per quarter for 6 quarters, allowing for attrition and start up time)

- Generate 25 inquiries per month during each quarter of the first and second project year.(600)
- Register 12 people per monthly orientation during each quarter of the first and second project year. (288)
- Generate 30 eligible applicants from orientations and referring partners during each quarter of the first and second project year. (240)
- Enroll 180 account holders>165 with 8% attrition

Feature or Benefit?

- **2:1 match rate**
- **Your savings grow at a faster rate than the stock market without the risk**
- **10 weeks of financial management classes**
- **Learn how to cut expenses and save more money**
- **Learn how to fix your credit**
- **Monthly peer support meeting**
- **Become your own boss**
- **Become a homeowner**

Features and Benefits

Features

- Describe the characteristics of a product or service
 - Style
 - Design
 - Price
 - Availability
 - Etc.

Benefits

- Describe what the customer will get out of a product or service
 - Solve a person's problem
 - Save a person time or money
 - Improve the person

Developing Marketing Message

- Develop a marketing message for the target market you examined in step 1 OR a target market assigned to your group
- Use flip charts
- You will have 10 minutes
- You will be asked to present your message to the rest of the group

5 Promotional Strategies

- Advertising
- Sales Promotion
- Direct Mailing
- Public Relations
- Personal Selling

5 Promotional Strategies (continued)

- What key pieces of information from the Target Market Analysis will help you the most in figuring out the best promotional strategies and tactics to use to reach a particular TM?

Tactics—Option 1

- In your groups, come up with as many tactics as you can think of to promote the message you developed for your target market.
- You have 4 minutes.
- Looking for:
 - The group with the most ideas
 - The group with the most creative idea
 - The group with the best low-cost idea

Tactics—Option 2

- In your groups, come up with as many tactics as you can think of (considering all of the target markets served in your group) under each of the five strategies.
- You have 4 minutes.
- Looking for:
 - The group with the most ideas
 - The group with the most creative idea
 - The group with the best low-cost idea

Implementation

- Assign accountability and roles
- Prepare materials
- Insure that staff and partner staff, if appropriate, know and understand the message and the plan
- Arrange for timely responses to queries (phone messages, web messages, orientation sessions)
- Prepare and distribute any necessary forms or procedural documents
- Implement your recruitment plan

Evaluation

- Track your results
 - How many queries from what strategy?
 - How many applicants from target market members or referral sources?
 - How many eligible applicants from target markets/sources?
 - How many enrolled from target markets/sources?
 - Retention rate for target markets/sources?
- Be prepared to make changes in target markets or recruitment strategies.

AFI Resource Center

For more information on this or other AFI Training Curriculum modules, contact the AFI Resource Center at the Office of Community Services

Phone: (202) 401-4626

Email: AFIProgram@acf.hhs.gov

Web: <http://www.acf.hhs.gov/assetbuilding>