



**The Tallahassee Chapter of the  
American Society of Training and Development**

**2010 Strategic Marketing Plan  
May 18, 2010  
Final**

## OVERVIEW

The purpose of this strategic marketing plan package for the Tallahassee Chapter of the American Society for Training and Development is to develop and deploy a proven, world-class, value added customer driven marketing plan for achieving our 2010 business plan goals. The scope of this strategic marketing plan covers all areas of our Chapter including:

- Programming
- Networking
- Member Communication
- Technology Support
- Member Growth
- Revenue Generation
- Overall Governance

To generate a three-year strategic planning guidance structure and to build the action plans for 2010, the 2010 ASTD-Tallahassee Board met on January 17, 2010. Information utilized came from teleconferences with other chapter leadership, reviews of efforts by other chapters, and research on ASTD national website, as well as from each Board member's personal experience.

This document provides the results of that strategic planning effort and intentions. It is broken down into the following sections:

1. Acknowledgements
2. Vision, Mission and Beliefs
3. Critical Success Factors and Measures
4. Process Improvement Goals for 2010, 2011, and 2010
5. SWOTs
6. Competition Factors
7. 2010 Action Plans
8. Action Plans Detail Schedule

### Acknowledgements

This generation of this document would not have been possible without the persistent effort of **Director at Large, Dale Weeks**. In addition, while it goes without saying that the input of each individual on the board was essential in crafting this document, the amount of time invested by each has been significant. This serves as an acknowledgement and strong 'thank you' to all 2010 ASTD-Tallahassee Board Members:

Suzanne Ebbers, Ph.D.	President
Denise Wilson	Immediate Past President
Amanda Allen	Vice President of Programs/President-Elect
Laura Kerney	Vice President of Finance
Jennifer Sweeney-Colvin	Vice President of Membership
Monica Lazo	Vice President of Communication
Neal Meadows, Ed.D.	Vice President of Technology
Frank Broen	Director at Large
Dale Weeks	Director at Large
Paul Brawner	Director at Large

### Vision, Mission and Beliefs

The Board carefully considered the stated vision, mission and beliefs of the Tallahassee ASTD chapter:

**Vision**

Our vision is to be the premier organization for the facilitation of performance excellence within the training and development community.

**Mission**

Our mission is to promote excellence in human performance improvement by providing professional development and networking opportunities for individuals and organizations.

**We Believe In:**

1. Identifying and responding to the needs of our members and our community.
2. Equipping professionals to make a difference.
3. Motivating professionals to "go the extra mile" to help others achieve performance excellence.
4. Building relationships.
5. Having pride in the profession of training.
6. Active participation by our members.

Practicing what we teach, including: needs and wants assessments, continual improvement, working in teams, being systematic, feedback and evaluation, being a learning organization and recognition.

In seeking a way forward, the Board determined that it would focus on member performance improvement, rather than organizational improvement, with the further intent to foster Kirkpatrick performance levels 3 and 4 through post-program support.

**Critical Success Factors and Measures**

The Board identified several desired critical success factors and output measures, as indicated through monthly end-of-program surveys and end-of-year needs assessment survey. The factors and measures the Board designated as determining chapter success include:

2010

1. Membership numbers increased from 62 to 80.
2. Joint membership (local and national) maintained at 50%.
3. Program learning transfer measured at 80%.
4. Program organizational impact measured at 20%.
5. Revenue growth will be sufficient to enable 2011 board to pay small stipend for speakers and provide more member benefits to members (such as: regional or national speaker; an eSig or EvalSig)
6. Chapter Excellence award received in 2011 for 2010 effort.
7. Members will rank as 'Agree' or 'Highly agree' with the following statement: "ASTD-Tallahassee is a supportive community and meets my workplace learning and performance professional requirements."

2011

Added measures for 2011 include:

1. Membership numbers increased from 80 to 101.

2012

Added measures for 2010 include:

1. Membership numbers increased from 101 to 125.

### **Process Improvement Goals for 2010, 2011, and 2010**

There are many ways to achieve such outputs. Provided below is a listing of the processes and inputs by which we propose to achieve the designated outputs.

#### 2010

2. Provide 10 programs, including 1 “TechKnow” conference
3. Provide 2 formalized socials
4. You will have 3 useful networking contacts
5. Provide a monthly member spotlight
6. Provide sense of community and support
7. Utilize social networking tools
8. Board calls members with personal outreach
9. Developing a member services packet
10. Develop and deliver a prospective member packet
11. Providing a quarterly President’s letter on our progress for YOU!
12. Improve website functionality and services to members
13. Obtain sponsors for 2 programs
14. Work towards one Chapter Excellence award for 2011
15. Develop website sponsorship opportunities and obtain 1 sponsor
16. Market ChIP Code

#### 2011

The additions and changes to the 2010 goals/objectives include:

1. Increase membership from 80 to 101.
2. Increase past 3 the number of useful new networking contacts acquired
3. Develop a SIG<sup>1</sup>
4. Obtain program sponsors for half of the provided programs (5)
5. Work towards one Chapter Excellence award for 2010.
6. Obtain and maintain 2 website sponsors.

#### 2012

In addition to sustaining and improving upon previously-identified efforts, the following are additions and changes to the 2011 goals/objectives:

---

<sup>1</sup> SIG-Special Interest Group, in either Technology or Evaluation

1. Increase membership from 101 to 125
2. Obtain program sponsors for all programs
3. Work towards one Chapter Excellence award for 2013
4. Obtain and maintain 3 website sponsor

## **SWOTs**

The following SWOTs (Strengths, Weaknesses, Opportunities and Threats) of the Board's commitment to the identified critical success output measures and process goals were generated as an effort to further scope out the environment.

### Strengths

- Stability for the last 3 years
- Sound chapter operations
- Solid membership base, community awareness
- Full slate of board members
- Strong leadership and direction
- Other professional associations are not as structured – in name only, very few plans.

### Weaknesses

- Time and involvement required to achieve stretch goals
- Bench strength beyond board members
- Organizational involvement and membership not evident
- Very tight budget and financial picture locally and beyond
- “Bowling Alone” evident – willingness to volunteer to achieve excellence – work/life balance – going the extra mile or two or three!

### Opportunities

- Community is open to growth and development through targeted efforts
- Other chapters/associations in guarded current positions
- People in need for development/career planning – self reliance across several generations – comprehensive talent management does not exist in most organizations

### Threats

- Other associations will attract our leaders and members
- Not enough time and commitment to do this – need to continually emphasize our value added – personally and organizationally – knowing what excellence is and continually offering it to our members/customers

## **Competition Factors**

Beyond SWOTs, competitive factors that could hinder success include:

- Other local and national associations and chapters
- Volunteer time – either work or non-work
- Little or reduced organizational commitment to WLP in tough budget climate – individuals need to be self-motivated.
- Board member commitment; spending 1 – 2 hours per week focusing on their goals.

Success hinges on each Board member's willingness to go beyond the minimum, striving always to exceed customer expectations.



## 2010 Action Plans

To successfully achieve the Board's set of process goals and resulting critical success outputs, action plans were established corporately and, in greater detail, individually for 2010. The following action plans are listed by service area.

### Membership

#### VP Membership: Jennifer Sweeney-Colvin

##### Target Outcomes

- 80 members by 12/10
- Joint membership (national & local) maintained at 50%

##### Processes and Inputs to Achieve Target Outcomes

- Develop membership benefits brochure
- Develop membership welcome packet
  - information about the board (photos, bios, contact info)
  - overview of the chapter mission & vision
  - highlights of past programs
  - volunteer sign-up sheet with a section specifying their interests
  - a letter from the president.
- Email and phone call campaign to former members conducted by board members
  - Generate call script, including brainstormed responses for possible reasons they may not return
  - Obtain for former members 1-2 reasons for not returning
- Email and phone call campaign to 'national but not local' members conducted by board members
  - Discuss benefits
  - Offer one free program pass – time-limited (3 months)
- Provide guest pass on website and in Eventbrite inviting first time visitors (program free – only cost of food)
- Provide member 'bring a guest' incentives
  - Every time a guest is brought, name goes into the hat for drawing at end of year social. Winner receives 6 months membership extension.
  - When a guest becomes a member, the person who invited the guest receives 'X' months extension (1, 2, 3?) on their membership.

### Professional Development/Programming & Networking

#### VP Programs & President-Elect: Amanda Allen

#### Director at Large: Dale Weeks

##### Target Outcomes

- 10 programs/year are delivered with Good or Excellent across the board ratings.
- 1 end-of-year social is delivered.
- Tallahassee TechKnow Expo is delivered in October with Good or Excellent across the board ratings.
- High or very high beneficial impact through professional development activities reported by members.
- Each member reports securing 3 useful new contacts on end-of-year needs assessment survey.
- Members report experiencing a sense of community and support on end-of-year needs assessment survey

### Processes and Inputs to Achieve Target Outcomes

1. RFP for potential speakers to institutionalize the speaker selection process developed.
  - a. Ensure that tangible results like handouts, tools, tips, website, job aids are included in presentation.
2. Location and caterer for the year determined.
3. Program speakers secured at least 3 months in advance.
4. Program agenda adhered to, including
  - a. ½ hour for meet and greet, meal, 5-minute networking activity, President's welcoming remarks, and VP President's speaker introduction.
  - b. 50 minutes for speaker
  - c. 10 minutes for Q&A
5. Social planned at least 1 month in advance.
6. Within-program mini-networking events (5 minute durations) delivered.
7. Four informal networking events delivered.

### **Continuous Learning Bridge** **Director at Large: Frank Broen**

#### Target Outcomes

- Attendees will self-report achievement of Kirkpatrick levels 3 (80% learning transfer to workplace) and 4 (20%-institutional impact) during 1-month-post-program phone calls.

#### Processes and Inputs to Achieve Target Outcomes

1. Program content recorded and merged with presentation slides
2. Post-program recording uploaded on website along with a minimum of 3 recommended resources from program presenter.
3. Three Wiki questions posted per program
4. Levels 3 and 4 evaluation follow-up process and procedure implemented monthly.
  - Levels 3 and 4 evaluation protocol developed.
  - Phone calling procedure determined.

### **Website**

#### **VP Technology: Neal Meadows, Ed.D.**

#### Target Outcomes

- Members report experiencing a sense of community and support on end-of-year needs assessment survey
- 80 members by 12/10
- Joint membership (national & local) maintained at 50%

#### Processes and Inputs to Achieve Target Outcomes

Website functionality and services improved to include:

1. Board-wide capability to upload and change content on website through the use of Sharepoint enabled.
2. Members-only section provided.
3. National resources section provided.
4. Job bank provided
5. Social networking kinds of opportunities utilized.
6. Monthly member spotlight

## **Communication Efforts**

### **VP Communication: Monica Lazo**

#### Target Outcomes

- High or very high beneficial impact through professional development activities reported by members.
- Each member reports securing 3 useful new contacts on end-of-year needs assessment survey.
- Members report experiencing a sense of community and support on end-of-year needs assessment survey

#### Processes and Inputs to Achieve Target Outcomes

1. Email program invitations sent out on first day of month and 2<sup>nd</sup> Tuesday of month.
  - Invitation content delivered to VP Communications
  - 1-minute teaser interview with upcoming program speaker videotaped
  - Teaser interview link embedded into invitation
2. Monthly member spotlight delivered on website
  - Interview protocol developed
  - Interview procedure established.
  - Interview conducted.
  - Spotlight article written and submitted to Neal.
3. Quarterly newsletter developed, to include:
  - A 'look' for the newsletter developed.
  - Sections
    - i. Mission, Vision, and Board Members Link (that will send people to website listing comes up on front page every time )
    - ii. Upcoming Events (we can advertise the upcoming programs
    - iii. Member Doings' (75 words – what members are doing, have been awarded, or will do + optional pic)
    - iv. Member Spotlight
      1. Develop interview template and interview individual from one of our programs
      2. Take photo
    - v. Write article – do we do this monthly and post on website as well to generate interest?
    - vi. Local business or organization spotlight
    - vii. 'Tweener' Corner (Addresses issue(s) regarding being in-between employment and/or career changers, etc.)
    - viii. eLearning Essentials (an article that provides useful information – plus perhaps a 'how to do this' set of screen shots)
    - ix. Business Corner (advertising area where members can advertise their services – maybe 100 words or so, plus name, logo and picture (optional)) (we'd advertise for folks in the first newsletter – set a quarterly deadline)
    - x. Volunteer Corner (advertises openings we have or opportunities to help out)
    - xi. Awesome Media Corner (review of book, video, podcast, or other learning media and why it's awesome-if member has written it, they should be first)
  - Market CHIP code and Power of 2 (we need fairly consistent verbiage along with the logos)

## **Finances**

### **VP Finance: Laura Kerney**

## **Director at Large: Paul Brawner**

### Target Outcomes

- 10 programs/year are delivered with Good or Excellent across the board ratings.
- 1 end-of-year social is delivered.
- Tallahassee TechKnow Expo is delivered in October with Good or Excellent across the board ratings.
- High or very high beneficial impact through professional development activities reported by members.

### Processes and Inputs to Achieve Target Outcomes

1. Provide a discounting structure for sustained membership enrollment.
2. Provide an incentives structure for potential new members and for current members who 1) bring guests to meetings and/or 2) whose guest becomes a member.
3. Website sponsorship fundraising opportunity guidelines developed and provided.
4. Program sponsorship fundraising opportunity guidelines developed and provided.

### **Action Plan Details Schedule**

To achieve all listed action plan items, an Action Plan Details schedule on the following pages was developed against which process goal progress would be measured.



**Action Plan Timeline: Communication**

Activity	Who?	April	May	June	July	Aug	Sept	Oct	Nov	Dec
<b>Quarterly Newsletter</b>		X			X			X		
<b>Develop a 'look' for the newsletter.</b>										
<b>Contest:</b> Conduct a contest for a name for our newsletter. (What will we give them as a prize? 3 months membership free? Free program?)		X								
<b>Mission, Vision, and Board Members Link</b> (that will send people to website listing – this will be the front page – comes up every time )	Monica									
<b>Upcoming Events</b> (we can advertise the upcoming programs)	Monica									
<b>Member Doings'</b> (75 words – what members are doing, have been awarded, or will do + optional pic)	Monica									
<b>Member Spotlight</b> (develop interview template and interview individual from one of our programs; take photo, write article – do we do this monthly and post on website as well to generate interest?)	Monica & Frank (photo)									
<b>Local business or organization spotlight</b> (Need some help defining this – how will we get the names of orgs, and how do we prioritize them – are they sponsors only?)	???									
<b>'Tweeners' Corner</b> (somehow this section will address some issue(s) regarding being in—between employment and/or career changers, etc.)	Board member (Sue? Other?)									
<b>eLearning Essentials</b> (an article that provides useful information – plus perhaps a 'how to do this' set of screen shots)	Board members? Other?									
<b>Business Corner</b> (advertising area where members can advertise their services)	Monica									

Marketing Plan for ASTD Tallahassee Chapter

– maybe 100 words or so, plus name, logo and picture (optional)) (we’d advertise for folks in the first newsletter – set a quarterly deadline)										
<b>Volunteer Corner</b> (advertises openings we have or opportunities to help out)	Monica									
<b>Awesome Book Corner</b> (review of book and why it’s awesome-if member has written it, they should be first)	Board members? Membership?									
<b>Market ChIP code and Power of 2</b> (we need fairly consistent verbiage along with the logos)	Monica									

**Action Plan Timeline: Finance**

Activity	Who?	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Secure 2 program sponsorships (TechKnow?)	Laura							X		
Secure (at least) one website sponsorship (what is the package that we will offer them?)	Laura					?				
Develop a sponsorship package	Laura	X								

**Action Plan Timeline: Membership**

Activity	Who?	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Develop a membership package (itemize the benefits,	Jennifer/ Laura/Board	X								
Plan the membership drives for 1) current national ASTD members; 2) past non-renewed members; 3) students; 4) other? (timeline, scripts, pass out lists to everyone)	Jennifer	X								
Conduct phone calling membership drives (we need a plan from Jennifer on this)	Board	X	X	X	X	X	X	X		
Develop incentives & discounting packages for membership growth: 1) bring a guest & get 1 month off membership – if guest joins, person gets 2 months off?; 2) bring a guest – get a ticket for each member you bring – end of year, all tickets go into pot for end-of-year drawing – need to get prizes to give out; 3) bring guest and get a free program voucher with an expiration date; 4) discount on programs for paying the rest of the year?	Jennifer/ Sue/ Laura/ Others?	X								

**Action Plan Timeline: Technology**

Activity	Who?	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Transition website to portal (Map out all pages – identify what should be content on all pages, board member responsibilities, etc.)	Neal/ Committee			X						
Continue to develop current website (add member spotlight – do we want one monthly?)	Neal	X	X	X						
Job Bank – develop and maintain (how are we going to get the job listings – do we need to contact businesses and let them know we’re here? What do we do?)	Neal and committee/ Laura?									
Quarterly newsletter – create special page on website	Neal									