CCA Program Marketing

12 September 2023

My Directive from Search Committee & Boards
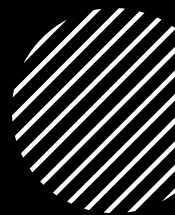
01
Address the declining membership

02
Change in publications model needs to be addressed (open access … offset declining revenue)

03
Overall: Need to market our programs more dynamically, systematically

New Marketing Dep't

Began work in January '23

Initial Focus: Membership & Annual Meeting marketing

Results

Headed for first membership increase since 2012

Annual Meeting on trajectory to break attendance record

Time to turn our attention toward certification

The Me, Me, Me Generation

"There they are, those preening narcissists who have to document every banal moment with their cutting-edge communications technology."

KIDS AND MTV · THE NEW HARDWARE

Newsweek

December 30, 1985

The Video Generation
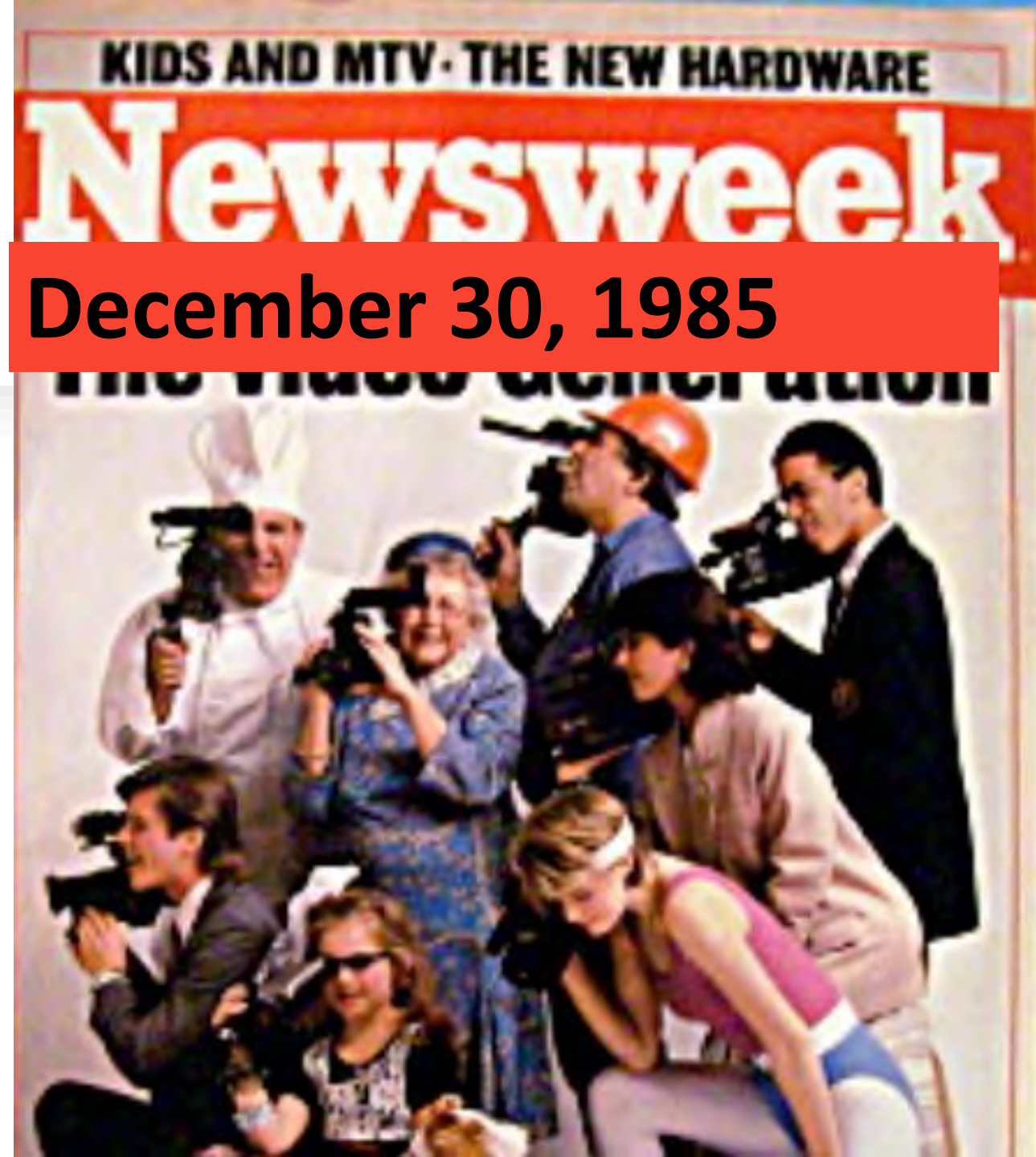
CCA Program Marketing

- Overall number of CCAs has declined
- Consistent with workforce dev issues we hear about everywhere
- New exam registrations dropped significantly in 2022-23
  - Continuous testing might have contributed
  - But decline is consistent w/ workforce trends
- There's opportunity out there to tell the CCA story better…
- And to pursue new tactics to drive registrations

Case Study—CFA Institute

Association for Investment Management & Research (1997)

AIMR → **CFA Institute**

Sleepy membership and credentialing organization

Had 18,000 members & about 40,000 candidates in its educational program

Successful despite unimaginative approach to marketing

Management & staff weary of "cheapening" organizational principles with marketing

And it showed

The "CFA Story" left untold

Didn't want "growth for growth's sake"

Believed candidates & members would arrive no matter what we did

Felt that "marketing speak" would corrupt organization's reputation (academic-like environment)
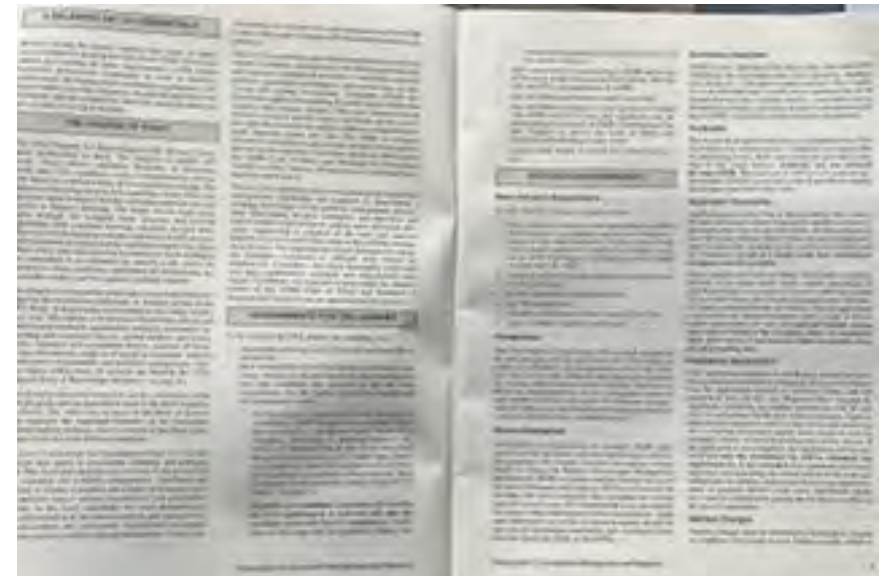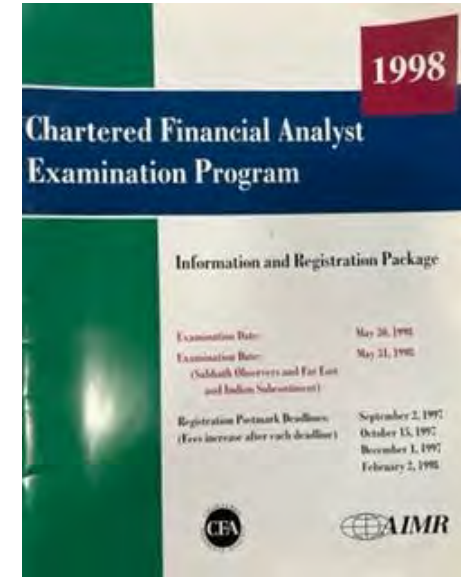
Sophisticated audience accustomed to reviewing materials from world's most successful companies

Story needed to be told, but needed to be told elegantly (and "CFA" was the brand, not "AIMR")

"Tell the story through the eyes of the members"

"Let the members tell the world what we're about"

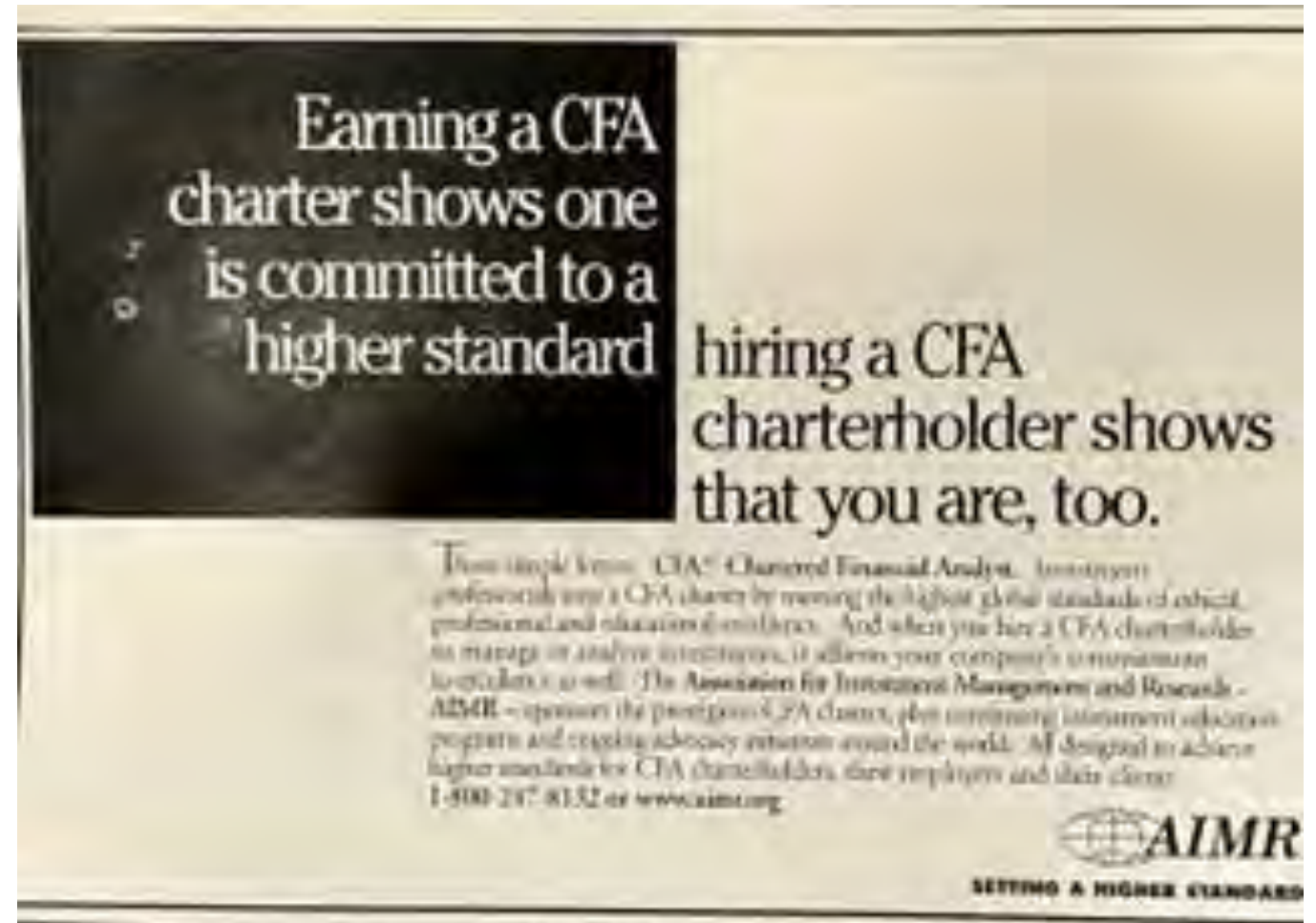# CFA Program "Marketing"

The Annual Report

The Member Newsletter

Public awareness advertising

Changing the story

- Let members & stakeholders tell the story
- Let members show global reach though words & images
- Tell the story with elegance, without being too "sales-y"
- Allow members to articulate the value proposition
- Show the influence & reach of members (where they worked)

Applied Storytelling….
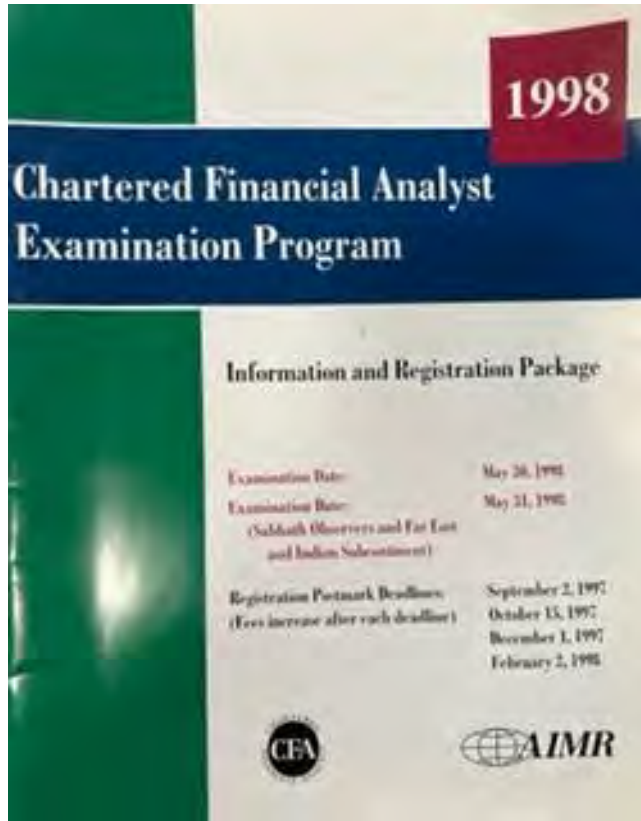
…to our marketing collateral

Applied storytelling...

...to our publications

Applied storytelling...

Photography & messaging fed all marketing channels:

- Website
- Presentations
- Graphics @ educational programs
- The members took center stage

...to our advertising

Growth in numbers, influence & relevance

- Growth in size & revenue had never been the explicit goal
- But the resources and sphere of influence the growth enabled was definitely welcome
- Ability to influence best practices and standards on a global basis
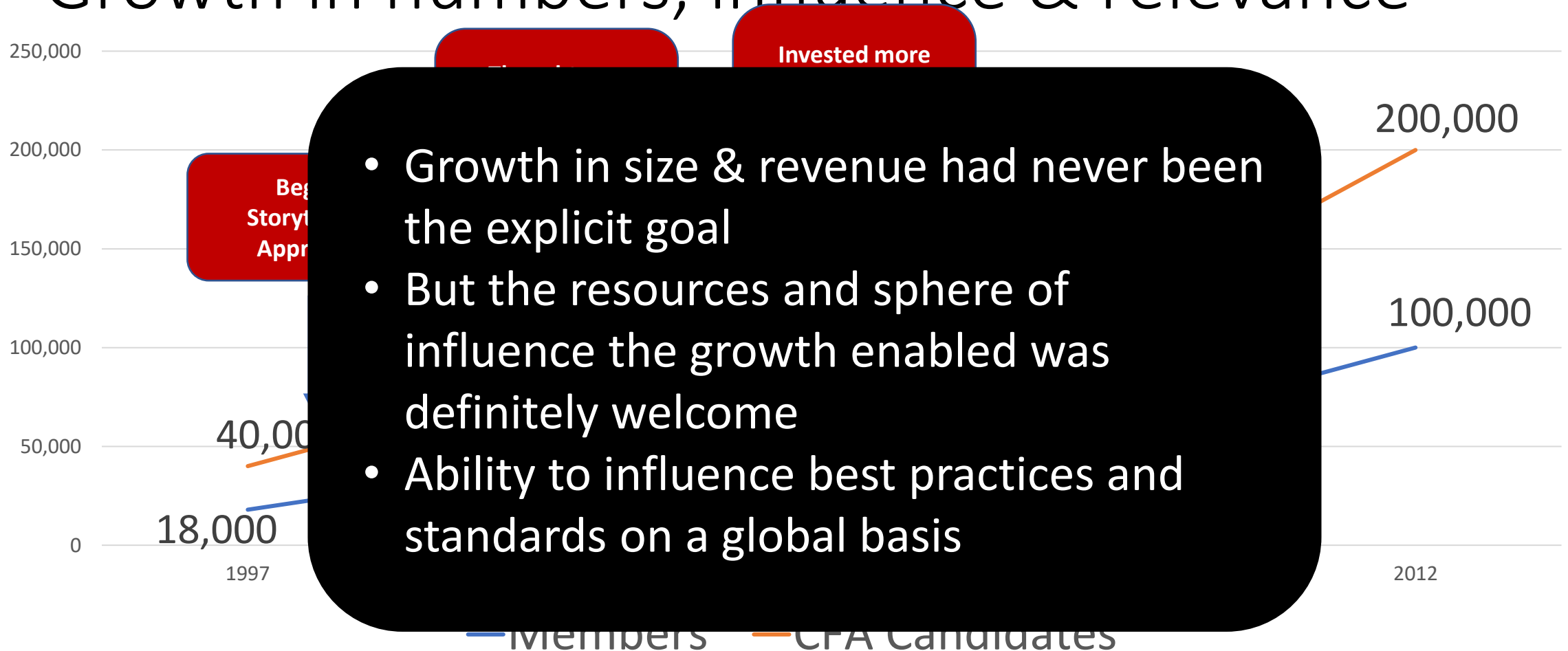
Case Study—W3C

Case Study: W3C

- A consortium that literally founded the World Wide Web

- Still define the standards that allow the Web to exist

- They were way to humble, way too conservative

- Their mission suffered

- Needed a new approach, to tell their story better
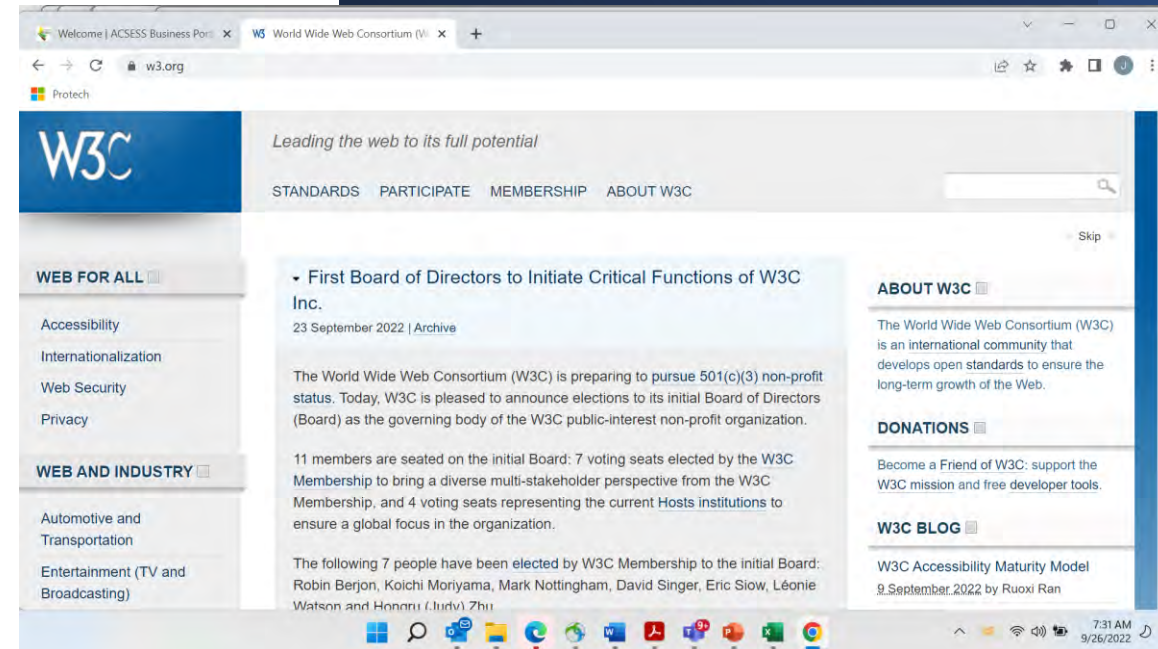
What Inspires You about W3C?

A non-profit that doesn't have a commercial objective, only to make the world a better place

Equitable, fair, collegial

The origin story is inspiring, a values-driven project

It shapes a platform to enable so many people to create, discuss, change, build, and create more potential with improvement over time

Working together through policies, processes, and institutional memory to change the world at a scale that is incredible in the impact

From staff & key stakeholder interviews w/ Virtual, October 2021

W3C Accomplishments over Next 10 years?

- Play an ==essential role in the evolution of the Web==
- Web standards are developed the same way they are now
- ==The Web spreads its wings and W3C spreads into these areas==
- More and more rich capabilities to make the Web a more capable platform
- A way for consumers to get more access to data
- ==Increasingly support areas like financial services, supply chain, manufacturing, media & entertainment==
- Continue to make the Web more accessible, private, secure

From staff & key stakeholder interviews w/ Virtual, October 2021

Marketing Assets

STORY: THE CENTRAL FIGURE IN FORMATION OF THE WEB
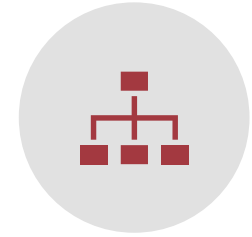
INFLUENCE OF MEMBER COMPANIES

MEANINGFUL POSITIONS, PROJECTS, INITIATIVES
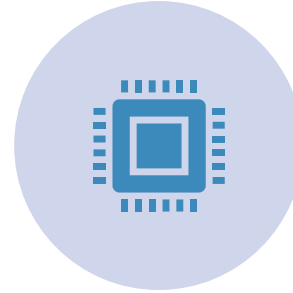
EXPERTISE OF STAFF

MASSIVE, EXISTING LIBRARY OF CONTENT

Existing presence on social media platforms

What Will Enable Success for W3C?

Processes Demystified. If someone has great idea, they have levers and capabilities of W3C to engage the Web technology community to make them happen

Awareness. More people having knowledge of W3C and its programs (esp web technologists)

Collaboration. Harness collective energy of people to jump in and make things happen

Consensus. Everyone talks about the need for more secure infrastructure and privacy … getting that done right is a moonshot and there's no commercial interest in making that happen

Marketing can support all of these success drivers

From staff & key stakeholder interviews w/ Virtual, October 2021

W3C's Branding Peers

We champion help and a better future for all

A world where human rights are enjoyed by all

To prevent and alleviate human suffering wherever it may be found

We help build a better world by advancing innovation safety, sustainability, and connected security

The free encyclopedia

Reducing global poverty, encouraging international trade, and promoting financial stability and economic growth

Ensure the ability of the earth to nurture life and all its diversity

Stop the degradation of the planet's natural environment and build a future in which humans live in harmony with nature
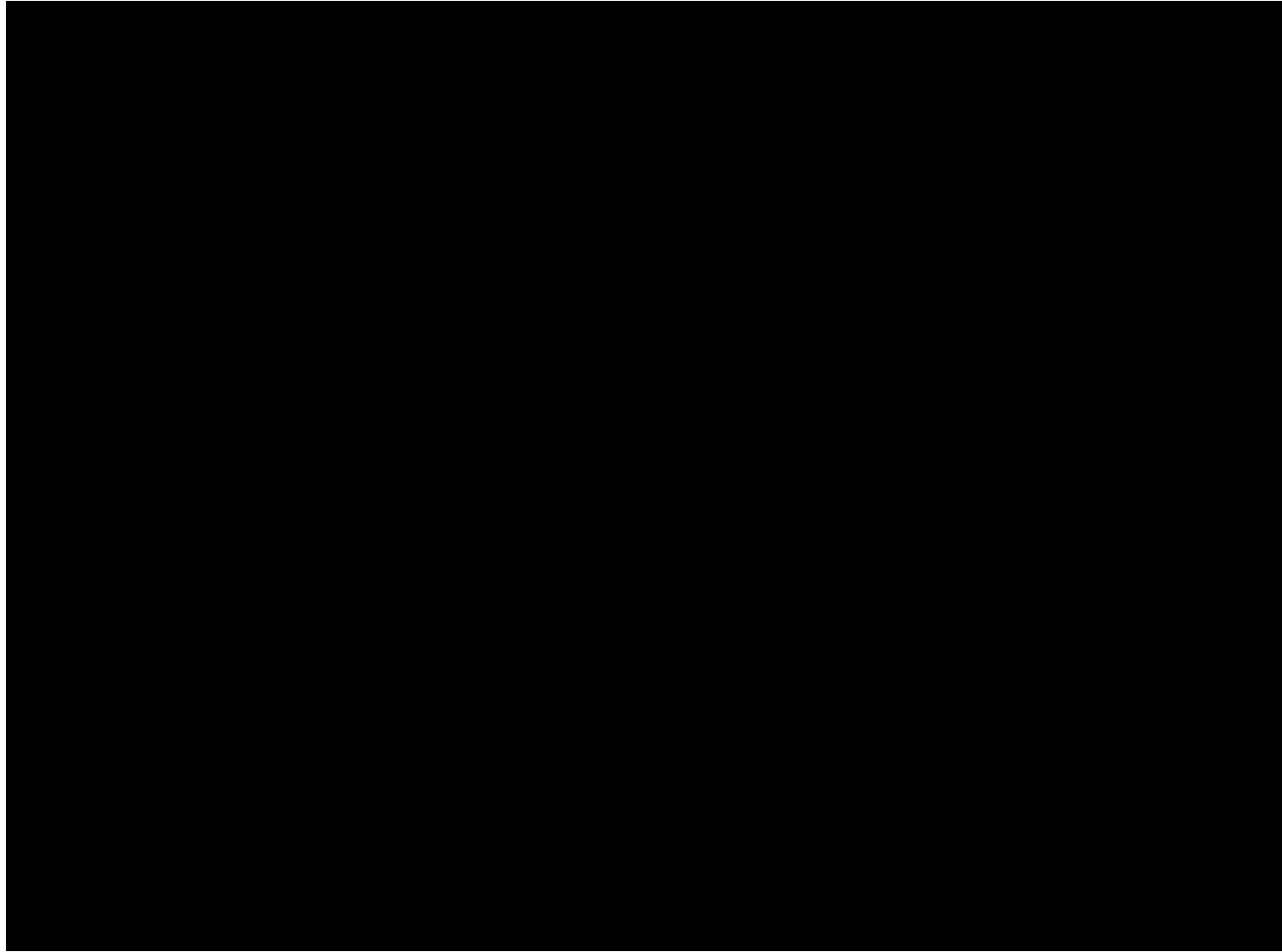
Privacy, simplified

Leading the Web to its full potential

Storytelling Example (for W3C)

Nasdaq leverages its listed companies
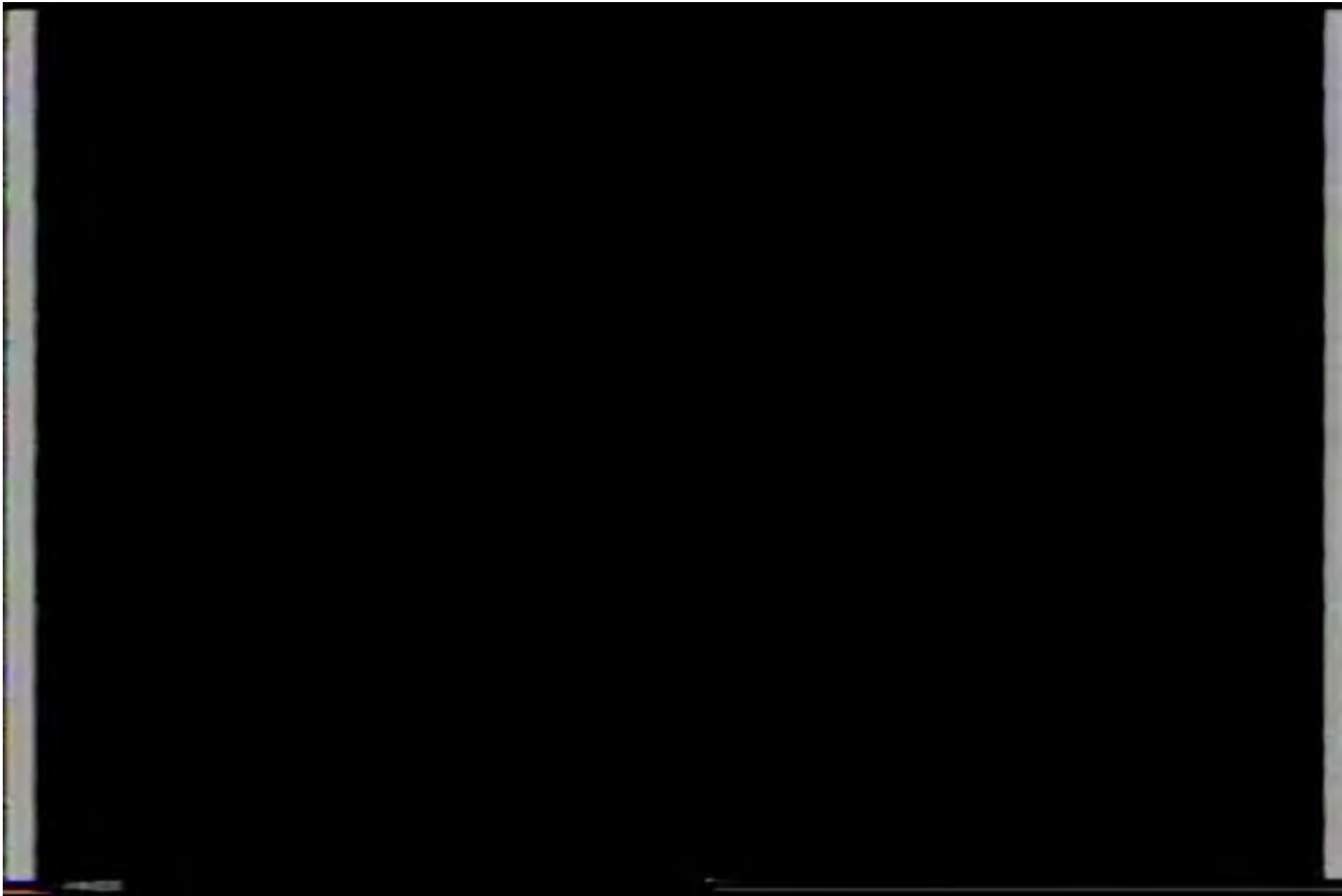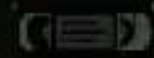
The Stock Market for the Next 100 Years

BECAME KNOWN AS THE STOCK MARKET FOR HIGH-TECH & MODERN COMPANIES

NOTICEABLE SHIFT FROM NEWSPAPER TO WEBSITE

DID A GREAT JOB OF LEVERAGING THE MEMBER COMPANIES TO TELL THE NASDAQ STORY

Recommendations

MINE & LEVERAGE EXISTING CONTENT

TELL THE W3C STORY IN NEW WAYS

MEMBER SPOTLIGHT SERIES

COOPERATIVE ADVERTISING & SOCIAL GRAPHICS

NEWSLETTER FACELIFT

NEW COLLATERAL

SEIZE OPPORTUNITIES FOR VISIBILITY

You don't even think about it.

You plug it in.
It works.

WE MAKE THE WEB FUNCTION THE SAME WAY, TOGETHER.

W3C® **LEADING THE WEB** TO ITS FULL POTENTIAL

Messaging can be general brand development

and/or

Tactical support for specific programs

↓

Targeted or micro-targeted at specific audiences

Paid Social

Graphics

Videos

Blogs
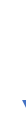
Using new content or leveraging library of content & resources

Recommendation 4: Cooperative Advertising & Social

Leveraging Members

Ever think about how the Web would work without standards?
THAT'S ALL WE DO.

W3C® MEMBER   Akamai

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12 September 2023

Changing Our Marketing Model

- Marketing air support boards' boots on the ground
- Tell our story better
- Get our story in front of more eyeballs
- Better understand our target market

What Are We Trying to Do?

1. Better <u>understand</u> the needs of our market (those seeking certification + their employers & influencers)

2. Better <u>meet</u> the needs of our market

3. Recruit more CCA candidates

4. Lose fewer CCAs

5. Engage CCAs in new types of programs

6. Certify more people

7. Advance our mission

Proposed Phased Approach + Timeline

| SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER | > ONGOING > |

PHASE 1

2 TO 4 WEEKS

Website: Review/Finalize content and update CCA pages (improve experience + reduce pages)
Awareness Campaign: notification of discontinuation of continuous testing
Audit + Identify all instances of "Continual Testing" (website content, use within materials) and update/remove for consistency*

PHASE 2

4 TO 8 WEEKS

Journey Mapping: outline the journey/actions necessary from creating account, registering for Exams, applying for CCA credentials and Renewals to create documentation and understanding of all touch points
Email: review all automation communications from initial to nurture; Update and refresh (see slides xx-xx)

PHASE 3

4 TO 12 WEEKS

Social uppaid: create social content calendar to promote CCA: process, Exam dates, scheduling, benefits (see slides 11 - 12)
Email (slides 13 - 15), **Collateral** (slide 19), **Paid Digital** (slides 16 - 17), **Partnership + Influencers** (slide 20): Identify tactics and campaigns to incorporate and develop specifics and KPIs

Continually monitor results (based on goals and KPIs) and modify as needed; Review content and opportunities for improvement/s

* Marketing Plan was developed with Continual Testing as an option; in August, decision to eliminate Continuous Testing; some content/information may need to be modified within this marketing plan to address this change.

Available Tactics

- Email (sustained campaigns)
- Unpaid social
- Paid social
- Paid digital (Feathr)
- Collateral
- Employer outreach

Today's Conversation

What are the major benefits of holding certification?

What drives decision to register for certification?

Who (what) are key influencers on candidates' decisions to register?

Touchpoints w/ potential candidates?

What tools do you need to get in front of more eyeballs?

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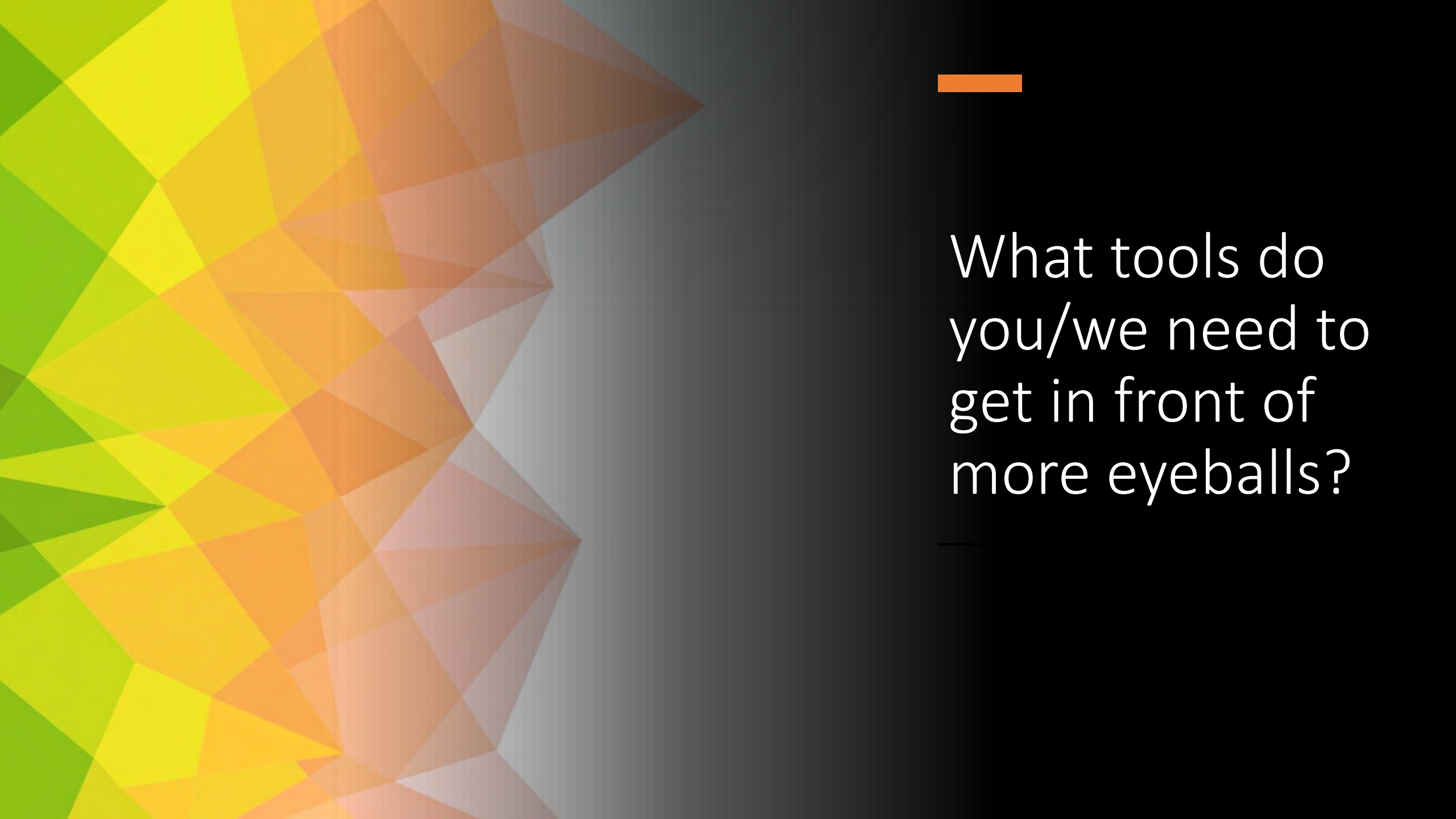
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Touchpoints w/ potential candidates?

What tools do you/we need to get in front of more eyeballs?

Mediums/Channels to Communicate

Be aware of the channels that you can utilize to a more cohesive and integrated campaign that can provide multiple 'touch points' to the various audiences.

→ **Website** (slides 9 - 10)

- Improve content and user experience (reduced the number of clicks, number of duplicate pages)
- Understand visitors (new vs returning; source medium of traffic; bounce rate; top pages visited; downloads)

→ **Social Unpaid** (slides 11 - 12)

- Identify top channels (based on reports and based on persona) and what content is most popular on each channel
- Incorporate targeted campaigns and test creative messaging and engagement (surveys, quizzes, badging...)

→ **Email** (slides 13 - 15)

- Email calendar based on CCA audience (understand overlap of emails to each audience to limit over-communication: identify best cadence and timing for optimum Open Rates)

→ **Paid Digital** (slides 16 - 17)

- Google Ad Grants; Feathr (digital ads) [reserved of ads based on 'pixel' tracking]

Mediums/Channels to Communicate

→ **Content** (slide 18)

- Blogs/articles, research/white papers, media/press, interviews

→ **Collateral and Marketing Materials** (slide 19)

- Look HERE to determine what needs to be update or what is missing
- Is there any data on use of materials; can you track download?

→ **Partnership + Collaboration + Influencers** (slide 20)

- Identify EDUs, state/regional chapters/affiliates and/or societies that have highest engagement and capitalize on their audiences (provide pre-packaged content/information to be included within their email/newsletters, social, other)

Website

→ **Become Certified** **specific pages:** Update Content to simplify messaging; reduce duplication of information; limit clicks (clear, simplified content that solves the users 'pain points' quickly)

→ **Create a complete Navigation of the entire site** and identify ways to reduce duplications of page content; verify content is correct/updated; eliminate pages that have limited content that can be incorporated elsewhere (if the page isn't benefit driven or necessary as another 'click' – then remove it);

- ◆ Ensure that if pages are removed from menu, there are redirects

- ◆ Create an ongoing calendar for review/updates across the site (Q1 review X main navigation and all sub page; Q2 review Y main navigation and all sub pages; and so on); identify product experts/owners of each section; have a timeline/production plan that includes due dates and deliverables for: Review Content; Provide Feedback + New Content; Update content/pages (include any redirects needed); Review of changes + user experience; Complete

- ◆ Look at 'hero' images and consider seasonal/event driven opportunities and refresh as needed; IDEAS: stats and facts; DYK (Did You Know); Quotes/Testimonials; Promote what 'Continuous Testing' is and the benefits/differentiators of becoming a CCA;

→ Review and keep update the CCA State/Regional contacts/websites and committees (LINK)

Email

→ Create an email nurture campaign for anyone who creates an account (Step #1 of Become Certified): to serve as a multi-touch communication that will encourage/increase completion (CCA credentialing):

EMAIL	INFORMATION/CONTENT/CTA	SUGGESTION OF SUBJECT LINES	CADENCE (suggestions)
#1	Thanks for creating an account; this is the first step to become a CCA; benefit of Continuous Testing + Virtual Proctoring; high level on the tests that are required and the 30-day policy of purchase of test to complete	Congratulations on taking the first step to long-term career success	+ 1 Day after creating account
#2	Resources / Learning for the Exams *** to ensure success; specific information they need to know from the Application/PDF (what pages and why); reminder about the 30-day policy; links to calendar of events	What you need to know for succeeding at achieving your CCA credentials	+7 Day from #1
#3	Quotes/testimonials from CCAs; stats and figures on the benefits of being a CCA; link to calendar of events	When you become a CCA, You are Joining the Best and the Brightest. Are you in?	+7 Day from #2
#4	Promote the marketing materials available to promote their credentials; highlight why becoming a CCA is a value and can increase career trajectory /financial impact	So, you are about to become a CCA – Now What	+14 Day from #3

***If you can segment contacts by geographic location/region; is it possible to create customized email content that is specific to the 'Local Board Exam' information; and add an if/then to the automation workflow?

Note that the 'CADENCE' is suggestive; depending on any data that identifies standard duration of time from creating account to completion of the Exams and submission of CCA credentialing; these dates can be modified, and Email #4 may not be necessary

Paid Digital

→ Google Ad Grants: these are text ads used for cultivating donations/support, volunteers, and brand awareness ($10K spend per month)

- Question: Are there any limits on using to cultivate membership or 'education' (CCA)?

- Suggestions: Do multiple tests based on headlines and search terms/keyword themes; for CTAs – use landing pages (see slide 9) with form fills and automation of emails; have variations on the landing page (learn more about becoming a CCA; Events/Conferences; Membership; Find a CCA...)

- Utilize Google Search Console + Google Trends to identify top performing 'Search Queries'

RESOURCES: LESSON PLAN to Launch a Success Ad Grants Campaign

Ad Grants Community Forum
Google Ads Support/Help
Pick Your Ad Goals

Identify: Campaign Goals (what you want to achieve); Title of campaign; Headline; Descriptions; keywords/search terms

LINK to BLANK Campaign Starter/Launch for Google Ad Grants

Collateral + Marketing Materials

→ Materials + Resources for Marketing: https://www.certifiedcropadviser.org/marketing

- More Materials: https://www.certifiedcropadviser.org/marketing/promotional-materials

→ Review all current materials to determine if update/refresh is necessary; consider doing a survey or finding a way to identify the value/use of these materials

- Consistent messaging and visuals that are also used across social and website (recall of message and imagery increases impact/action)

→ Recommend reviewing page/menu structure under "Marketing": there is opportunity to reduce pages and improve experience and ability for user to access/download materials

→ Are you tracking downloads? Consider using a UTM or tracking code to download URLs;

→ Incorporate specific downloadable materials within email (easy to track)

→ Consider ways you can incorporate these materials within unpaid social and or paid digital ads? Download CTAs

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