

MASTER PRACTITIONER SERIES

# MARKETING

## YOUR WELL-BEING PROGRAM

A comprehensive guide to professionally marketing your well-being program to maximize engagement

*Propel*<sup>®</sup>



Learn how to get more engagement from your least engaged employees.



Understand how to use the value propositions of your program to immediately boost participation.



Demystify the process of creating high-performing communication campaigns by following a time-tested framework.



Leverage the secret marketing strategy that will embed your program into your culture.

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# Chapter I: Understanding the Challenges of Well-Being Administrators

Across the board, well-being administrators face a myriad of challenges that hinder the effectiveness of their initiatives.

**One of the most pressing issues is the episodic nature of employee participation.** Many employees engage with well-being programs only sporadically, treating them as an extracurricular activity rather than an integral part of their work life. This casual participation often leads to a lack of meaningful engagement, which can undermine the very purpose of these initiatives. Even when employees do participate, they are not invested enough to make that participation count; that is, to turn participation into healthy habits.

**Leadership's expectations further complicate the landscape.** Executives are eager to see immediate results from their investments in well-being programs. They commit resources with the hope that these investments will yield quick, visible returns. However, senior and mid-level leaders may fail to fully buy in to the program. While they may acknowledge the importance of well-being, their lack of active participation sends a conflicting message to employees. When leaders don't prioritize well-being in their own work, it becomes challenging for their teams to view these initiatives as essential. The old adage is generally true: employees pay attention to what their bosses pay attention to.

**Added to these challenges is the pressure on the well-being administrator to be successful at running consistently impactful programming.** If employees believe that a well-being program is ineffective or shallow, the brand of the program suffers significantly. This perception creates a cycle of disengagement; employees who see a program falter are less likely to participate in future offerings. Furthermore, when powerful initiatives are implemented, they can go unnoticed simply due to a lack of awareness. Despite being well-structured and impactful, these programs may fail to garner the attention they deserve, resulting in missed opportunities for growth and improvement.

**Effectively communicating the value of well-being programs is another significant hurdle administrators face.** While the importance of well-being is clear to program leaders, translating that significance into language that inspires employees can be difficult. This is especially true of individuals who need to focus on their well-being the most. These individuals are often the hardest to reach and certainly the hardest to convey the value of the program to. In cases like these, it's not enough to simply inform employees about the existence of well-being initiatives; they must understand why these programs matter to their lives and work.

**Compounding these challenges are common misconceptions about eliciting employee participation.** Many well-being administrators operate under the assumption that “if you build it, they will come.” This belief often leads to an overemphasis on offering a wide range of tools and resources, underestimating the need for genuine engagement. The tools and resources are given a higher level of importance than quality design, effective communication, programming consistency, and marketing.

**At the heart of effective well-being programming lies the importance of communicating a clear value proposition to employees.** Successful well-being initiatives require a compelling reason for participation. To shift employee perceptions and motivate them to engage, it's essential that they understand the inherent value of the programs being offered. If that value exists but is poorly communicated, participation will likely remain low.

**Imagine yourself as the CEO of your well-being program. Your employees are your customers and your program is your product.** It's your job to understand your customers, highlight the value of your product, and ultimately "make the sale," which in this case means participation in your program. You must find a way to show your employees that participation in this program will positively improve their lives. Recognizing this fact is the first step toward creating a successful well-being program.

**This Sourcebook aims to explore marketing strategies that can effectively communicate the value of well-being initiatives and drive *real engagement* in your well-being program.** Marketing is not an optional skill for the well-being professional; it is a fundamental competency that enhances the ability to convey not only the "what," and "how," but also the "why" of health promotion. This Sourcebook will equip you with practical strategies that do not require a marketing background to apply to achieve greater participation and meaningful engagement in your well-being program.

## Chapter II: Communication vs. Marketing

For the well-being administrator, understanding the distinction between communication and marketing is essential for crafting effective engagement strategies. While many people believe these two concepts are basically the same in health promotion, they serve different purposes and employ unique methodologies. **This chapter will explore the nuances of communication and marketing, shedding light on why recognizing their differences is crucial for promoting well-being.**

At its most basic level, communication is the exchange of ideas between two or more parties. It focuses on transferring information and cultivating understanding among parties, whether in a formal or informal setting. Communication is designed to get information across effectively, relying on details, schedules, and facts to relay messages. In contrast, marketing is the art of persuasion; it aims to promote a specific set of ideas or outcomes, encouraging action to be taken. Marketing seeks to demonstrate the value of the desired outcome, employing strategies that resonate with the audience's emotions and motivations. **As it relates to a well-being program, a communication effort is designed to inform potential participants of the program's existence, what is included and how they can access the program. Marketing on the other hand, is an effort to persuade them to engage and continue engaging in the program—essentially, “selling” them on the value of engagement and the benefits of utilizing the programs various resources.**

## Marketing Your Well-being Program

The scope of topics covered by communication is broad and flexible, whereas marketing tends to adopt a more focused approach. Communication can range from casual conversations to structured presentations, always striving for clarity and effectiveness in conveying information. Marketing uses persuasive techniques that illustrate the benefits of taking specific action. It highlights demonstrated success in outcomes experienced by others, creating a compelling narrative that encourages individuals to engage.

Marketing language often includes emotional appeals, employing vivid imagery and persuasive phrases to connect with the audience's feelings. This encourages immediate responses through calls to action, prompting individuals to take the desired steps. Conversely, communication prioritizes clarity, focusing on the accurate relay of facts and data without pushing for immediate engagement. This difference in style reflects the underlying objectives of each discipline: communication aims to educate while marketing seeks to motivate.

The choice of words in marketing is highly strategic, utilizing power words and rhetorical techniques to create desire. In contrast, communication uses wording to gain the most understanding for a population or individual. Marketing often incorporates storytelling elements to engage the audience, making the message more memorable and relatable.

The intended audience of the messaging is another critical aspect that sets communication and marketing apart. Targeted marketing develops and writes for specific demographics, tailoring messages to meet the unique needs and preferences of select groups. This level of personalization allows marketers to resonate with their audience, creating a sense of connection and relevance. In contrast, communication may cast a wide net, aiming to inform a larger audience with generalized messaging that may not address individual preferences or needs.

## Marketing Your Well-being Program

Finally, the metrics used to evaluate success differ significantly. Marketing is judged by specific metrics aligned with pre-planned demographics and campaigns, assessing the effectiveness of targeted initiatives. In contrast, communication may focus on broad participation or message reception (also called “awareness”), without delving into specific engagement outcomes.

Anyone who has been charged with managing a well-being program knows well that simple awareness does not automatically result in engagement. Well-being promotion requires a focus on marketing, as it is more than just another announcement. Employees who don't understand the value of the well-being program will likely not participate let alone demonstrate significant engagement.

By understanding the differences between communication and marketing, you will be able to employ the right techniques at the right time to create the kind of engagement that gets the results your program is intended to achieve.

## Chapter III: Understanding the Value Proposition

**Effectively marketing a well-being program requires understanding the concept of a value proposition.** A value proposition is a succinct statement that encapsulates the unique benefits and advantages a service or program offers its participants. In the context of well-being initiatives, the value proposition articulates the distinct advantages of participation, demonstrating how these programs address specific needs and improve overall quality of life. It serves as an answer to the critical question: Why should individuals engage with this program?

**Crafting an effective value proposition requires careful consideration of three fundamental elements: clarity, relevance, and differentiation.** Clarity is vital; participants must have a clear understanding of what the program offers and how it works. This transparency fosters trust and encourages engagement. Relevance ensures that the program aligns with the needs and desires of the target audience. If participants see the program as pertinent to their lives, they are more likely to invest their time and effort. Finally, differentiation is crucial; highlighting what makes the well-being program stand out from other alternatives creates a compelling reason for individuals to choose it. Unlike in traditional marketing, there may not be an exact alternative for participants to choose. In most cases, the alternative is simply not participating, or in another way, spending time doing something else.

## Marketing Your Well-being Program

The value of a well-being program must be evident in every piece of marketing messaging directed at employees. Whether through emails, flyers, or face-to-face interactions, the message must consistently convey the program's worth. However, it's important to acknowledge that value is subjective and can vary among different groups. Your marketing efforts must consider how to tailor messaging to resonate with a variety of interests and motivations. A standard or template message that does not consider such differences simply will not be effective.

You will also find that there are macro-value propositions and micro-value propositions. Macro-value propositions represent the value of your program as a whole. These are useful for gaining initial buy-in, pitching the program to new employees, and keeping the central value proposition evident across program communications.

Micro-value propositions exist within each individual initiative. Different employees will identify with different value propositions. For example, in the case of a well-being competition, there will be a group that highly prizes the potential for earning an award (whether that is financial or non-financial) while another group values the competition among their peers and still another values the personal achievement of engaging with colleagues and meeting the competition goal. Each of these micro-value propositions should be leveraged in your marketing messaging to appeal to the largest number of potential participants.

## Marketing Your Well-being Program

Traditionally incentives have been viewed as monetary, but it's important to understand that all not all incentives are monetary. The reality is that incentive structures exist no matter what realm of life you observe. A person files their tax return because they are incentivized to do so, choosing to do the work of completing and filing a tax return over the potential risks of an audit, tax penalties or prison. The value proposition for timely filing a tax return would communicate the value a person gets from avoiding such a penalty. Recognizing this simple truth about incentives means that, to gain participation and engagement in a well-being program, an employee must understand the incentive structure to do so. However, those incentives take many forms. Well-being program incentives can be categorized into monetary, social, and personal benefits, each playing a crucial role in enhancing participation and engagement.

Monetary incentives are often the most immediately tangible. For instance, premium reductions can reduce the financial burden of healthcare costs, making well-being program participation feel like a wise investment. Health Savings Account (HSA) contributions provide employees with additional resources to manage their healthcare expenses, enhancing their financial security. Furthermore, offering gift cards or merchandise for program participation can create excitement and offer enjoyable rewards. Cash bonuses provide a straightforward incentive that are universally understood and appreciated.

Social incentives also contribute significantly to the perceived value of a well-being program. Opportunities for employees to socialize with colleagues around non-work-related topics can foster deeper connections and a sense of community. The positive aspects of peer pressure can motivate employees to prioritize their well-being, as they participate in activities that "everyone is doing." Recognition in front of peers can deliver a sense of status and accomplishment, reinforcing participation. Additionally, being part of a larger organizational initiative can fulfill individuals' desire to contribute to something bigger than themselves.

Lastly, personal incentives focus on the individual's journey toward improved health and well-being. Experiencing improvements in personal health outcomes, such as reduced stress, enhanced energy levels and better sleep can be profoundly gratifying. The expected outcome of feeling better—physically and emotionally—can drive individuals to engage actively with the program. Furthermore, achieving personal goals fosters a sense of accomplishment, motivating participants to commit to their well-being journey in sustainable ways.

### Try it out!

*Make a list of well-being activities and initiatives your organization has run in the last 12 months. Identify the incentives that exist within each activity or initiative. These incentives should be at the core of your marketing messaging.*

Clearly communicating the value proposition of your well-being program is essential for its success. Every incentive, whether monetary, social, or personal, should be articulated effectively to resonate with participants. Recognizing that multiple incentives often coexist within any given activity will enable you to tailor your messaging and maximize engagement.

# Chapter IV: Demographics of Employees

In our last chapter, we established some foundational value propositions that make the well-being program attractive to employees. That's just the beginning. The next critical step is to take a closer look at the characteristics of the employees themselves. Remember, you are ultimately charged with achieving significant program engagement. To get there, you need to market your program. And centuries of marketing have taught us that understanding how to motivate action requires understanding the target audience demographics. **You need to think about your employee population the way a professional marketer would.** Marketers look to demographics to provide the essential insights needed to craft targeted messages that resonate with specific groups. If you approach your program messaging from a marketer's perspective, relying heavily on group demographics and message differentiation, you will probably be in the top 5% of all program managers. This is because most programs provide only generic, template communications that make no distinction among employee groups. They work from the assumption that generic program awareness is all that is needed to drive program engagement. But your life experience tells you that such an approach is not likely to be effective.

**There is a reason that the ads you see on your social media feed are very different from what your kids see.** Marketers recognize that they have precious little time to get your attention and then be persuasive enough to turn that into action. And at some level, we appreciate the tailored messaging. If we are going to marketed to, we at least want the messaging to be relevant to those products and services that are interested to us. Your employees want the same thing.

**Understanding the demographics within your organization will greatly improve your ability to effectively present your program's features and benefits.** You likely have a good idea of some demographics within your organization, and you already use that knowledge in a variety of ways. A more directed process to truly understand and articulate employee demographics that will be useful for program marketing is well worth the effort.

The first step in this analysis is to develop employee personas that represent the main demographic segments within your organization. This begins with a thorough examination of the employee population to identify three to four key demographic categories. These categories may encompass factors such as age ranges, gender distribution, educational backgrounds, and professional roles. Try going one step beyond the obvious and add a second component to each demographic. Use the following prompt:

This group is made up of people who are \_\_\_\_\_, many of whom \_\_\_\_\_.

For example, in a manufacturing setting, an organization might describe a predominant demographic as:

males aged 35 to 50, **many of whom** are affiliated with a labor union.

Or maybe an organization has a group made up of people who are:

located in Dallas, Texas, **many of whom** work a desk job in our corporate office.

**Once you have identified your demographics, the next stage involves a deeper analysis of the characteristics associated with each group.** This analysis seeks to uncover their interests, preferences, and daily routines. Taking the earlier example, the demographic of 35–50-year-old males may place a high value on job security, strong relationships with colleagues, and opportunities for autonomy. Meanwhile, younger employees may prioritize recognition from peers and managers, as they focus on initial career advancement.

Isolate in on more defining characteristics. Where does your demographic congregate? What day-to-day activities does the group have in common? What is the overall personality of this group? What are the words or phrases that this group loves to use? These unique traits can be utilized to deliver communications that stand out from the rest. By mapping out these characteristics, you can align your messaging more closely with the values and needs of each demographic segment.

Following the development of these personas, it becomes essential to craft value propositions that resonate with each identified group. From our value proposition list in the previous chapter, we saw that competition can be a motivating incentive. In our example of employees in the Dallas office, we could recognize their rivalry with the Houston office. If a group well-being challenge is run by location, the two offices might get great engagement from the value generated by the prospect of beating their rival. Try naming a few well-being initiatives that you have previously run and write down a value proposition for each of your demographics.

In addition to developing tailored value propositions, you must revisit your communication strategies for these groups. It is important to consider whether it's feasible to create specific messages for each persona, while also exploring the potential for a singular, unifying communication approach that can engage all demographic groups. Achieving a balance between personalization and inclusivity is crucial to this process. The objective is to ensure that every employee feels valued and understood, which in turn fosters an engaging culture that enhances participation in your program.

Your targeted communication strategy will come into play when we discuss your omni-channel approach, however the habits you defined in this chapter are important to making those communications timely and relevant.

By effectively understanding and leveraging employee demographics, you not only enhance targeted communication and engagement strategies, but you also promote a culture where all employees feel recognized and valued.

## CASE STUDY:

A Propel client in the public sector was looking for a way to prompt their different departments to engage in their well-being program. Propel's approach is to take a substantial amount of time to understand each of our client's cultures, then create custom communication campaigns that integrate the culture and demographics for maximum impact. This client has a variety of departments, many of whom are highly siloed. Propel created custom communication campaigns for each department that focused on a particular trait of the department. The campaign to the transportation department highlighted the fact that the employees spend their entire day **helping citizens escape** the headaches of managing the daily commute. It then highlighted an aspect of the well-being portal that provided a mindfulness tool **to help the employees escape** for a moment. The communication to the fire department and to the police department drew on the friendly rivalry that the two had by placing a post-script at the end of the communication that read, "Please register, we can't have the [fire/police] department have more registrations than us." Propel designed more than a dozen communication materials specific to each department that spoke to unique motivating characteristics shared by employees within that department and branded each communication with each department's specific branding. The campaign elicited unprecedented attention and registrations for the well-being platform demonstrating success for the client.

## The Importance of Timing

We've all heard it said, "Timing is everything." That adage is certainly true when it comes to communicating your well-being program. In fact, one of the biggest mistakes a well-being program manager can make is to ignore the impact of timing.

All employees have preferences when it comes to receiving organizational communication. Some prefer seeing new communication at the start of the day before the work takes over. Others are more receptive during their breaks and still others, at the end of the day. Some are highly receptive to simple, overview messaging at the start of the day while others want detailed information they can review when they are away from the job.

Understanding the best way to leverage timing comes down to who, what, when and how. *Who should get what communication when and how should it be most effectively delivered.* So, how do you answer these questions? Leverage what you already know about your employees. You can probably already organize employees by the work they do and the environment in which they do it (office, field, warehouse, store, etc.). This gives you a lot of information about when employees are likely to be more receptive or more available to receive communication and the best method to send it.

If you are still not sure, do a survey, ask managers, go talk to a dozen or so employees in different jobs and simply ask them. How do you prefer to receive messaging about new initiatives? What time of day are you most likely to pay attention to that communication? What time of day do you least want to see it?

Whatever you do, it is not recommended to simply “cover all your bases” and flood the zone with as much communication as you can in every channel. This bombardment approach (which is too often the course taken) will only guarantee that nothing you send will get attention. It will simply be seen as noise and will be ignored.

Preferred communication channels also play a significant role in determining the success of a messaging strategy. Each job function may have varying levels of access to technology, influencing how employees prefer to receive communications. For example, a field employee may favor text messages or emails, while office staff might respond better to posters, digital signage or intranet posts. Conducting informal interviews with employees across various locations and positions can provide invaluable insights into their communication preferences and what formats resonate best with their colleagues.

With this information in hand, the next step is to create a rough outline that categorizes different employee groups based on their preferences and optimal communication times. This outline should detail the best mediums for reaching each group and specify the ideal hours for sending or displaying these communications. After the outline has been created, review communications from the last six months. How often have you communicated during the right window for each group?

By leveraging this foundational knowledge, managers can design a communication campaign that aligns with employees' habits and preferences, ultimately enhancing engagement and the overall success of the well-being program.

## Chapter V: Understanding Marketing Campaigns

### What is a Marketing Campaign?

At its core, a marketing campaign is a strategic effort designed to promote a specific message to a targeted audience. In the context of well-being programs, these campaigns serve a dual purpose: not only do they aim to inform and engage employees, but they also encourage a culture of well-being within your organization. Much like traditional marketing campaigns, your campaigns for your well-being program will have a specific objective, with a specific message, and be delivered to a targeted group of people.

These campaigns can take various forms, including email blasts, social media posts, or in-person events, all designed to resonate with the audience and foster a greater sense of community and well-being in the workplace.

### How Do Marketing Campaigns Work in the Context of Well-Being?

Many well-being administrators put a great deal of thought into the overarching strategy of their well-being program but do not carefully plan out how they communicate with employees. This oversight can hinder the program's success. Using a campaign-based approach to marketing will improve your oversight into how your efforts are tied into the success of your program.

Effective marketing campaigns are not just about sending out information; they involve understanding the needs and preferences of employees. Listening to feedback, observing participation trends, and adapting strategies accordingly can make a significant difference in how well these initiatives are received. Engaging employees through compelling narratives and relatable content will help to cultivate an atmosphere of enthusiasm and ownership over their well-being journey.

## **Key Elements of Marketing Campaigns**

When we consider the characteristics of marketing campaigns, several key elements come to mind. First, every campaign should start with a campaign objective; this is the goal that you want to achieve. Next, progress indicators are essential to measure the effectiveness of your efforts. A specific timeline helps to keep the campaign on track, while identifying the target audience ensures that your message reaches the right people. Selected channels, such as email, social media, or printed materials, are crucial for disseminating your message. Finally, marketing assets—visuals, content, and promotional items—are necessary to support your campaign and actually disseminate your messaging.

These core elements act as the foundation on which a successful marketing campaign can be built. The clarity of your objectives will guide every decision you make, from the design of your materials to the selection of communication channels. Additionally, having well-defined metrics in place will allow you to assess your impact and iterate on your approach as needed.

## Types of Marketing Campaigns

What types of marketing campaigns can you run? There are several **campaign styles** you can utilize, each with its own strengths.

### Channel-Based Marketing

One popular method is channel-based marketing. This strategy focuses on marketing in a specific channel, such as email, print, or digital. It is best used when a specific demographic within your target audience (or your target audience as a whole) is known to respond well to a particular channel. You would not employ this campaign style to a channel that gets little traction.

Propel's clients tend to use channel-specific campaigns for highly engaging channels leading up to a specific event or initiative. For example, video campaigns that are posted to the well-being portal or internal intranet, focused on participation in a challenge or company-wide initiative do very well.

Channel-based marketing does well to motivate a defined response, such as signing up for a well-being challenge or attending a particular lunch & learn onsite. This campaign style is perhaps the easiest to report on, considering a single channel can take credit for the action you are motivating.

## **Initiative-Based Campaigns**

Another campaign style is the initiative-based campaign. This approach focuses on using a specific initiative as the basis for the campaign and is the most common campaign used by well-being professionals. Running a campaign around a well-being challenge, health fair, onsite event, or live video session falls into this campaign category.

Unlike the channel-based campaign, this campaign style uses multiple channels to drive interest in or action toward a particular initiative. Initiative-based campaigns have a defined date range and will have defined performance indicators tied to participation in the initiatives.

## **Broad-Based Campaigns**

Finally, there are broad-based campaigns, which focus on broader objectives such as improving program awareness or motivating registrations. The timeline for a broad-based campaign is much longer and less defined than that of the previous two campaigns; however, it does not mean that this style should lack a specific objective with defined metrics.

Even in the case of a brand awareness campaign, surveys that catalog employee awareness should be taken at a baseline period and a defined future period. Yearly surveys can help to set defined dates on a broad-based goal.

Broad-based campaigns may also focus on common health promotion topics, such as mental health awareness. Propel recommends that, in the case of a health promotion campaign, smaller actions can be included as calls to action for employees, such as utilization of a specific benefit or resource. This can provide supplemental performance data for the campaign, even if it is not the overarching goal itself.

## **The Ultimate Goal of Marketing Campaigns**

Seeking attention is the ultimate goal of marketing campaigns. Marketing campaigns are essentially concerted, measurable efforts to grab the attention of your audience.

Each campaign type has a nearly unlimited number of variations that will make the campaign stand out and grab attention. Therefore, take time before planning a marketing campaign to consider your goals. This will enable you to select the most effective campaign type for your objective.

Let's discuss what is required to plan an effective marketing campaign.

# Chapter VI: Planning a Marketing Campaign

A well-planned marketing campaign can significantly enhance employee engagement, making it a vital tool for well-being administrators looking to make the most out of every opportunity to get in front of their colleagues. By effectively communicating initiatives, values, and opportunities, companies can create an environment where employees feel valued and connected to the organizational goals.

This chapter outlines essential steps in planning a marketing campaign that both resonates with employees and promotes engagement.

### Step 1. Establish the Goals and Objectives

The first step in planning an effective marketing campaign is to define its primary objectives. These objectives could range from increasing awareness of the well-being program to driving participation in key initiatives. It is essential to set SMART (specific, measurable, attainable, relevant and time-bound) goals to evaluate the campaign's success. For instance, instead of a vague goal like "improve employee well-being," a more precise objective could be "increase well-being program participation by at least 25% by the end of the third quarter." We would probably want to break this down even further to "sub-goals" under the broader "participation" heading. For example, we might say that goal 1 is a 25% increase in participation; goal 1(a) is "to increase participation by 15% in the Lunch & Learn Series events this August." Goals 1(b), 1(c) and 1(d) would be other sub-goals under the broad participation heading.

Aligning the campaign with broader organizational objectives is equally important. If your organization defines itself by specific values, the campaign should reflect these values to drive cultural consistency. A well-structured campaign not only engages employees but also reinforces the company's mission and values.

Keep in mind that a campaign goal needs to be attainable (the "A" in the SMART goals acronym). We are about to create a highly focused marketing campaign that we should expect will hit our target goal. As such, the goal must be feasible, especially in the time window we are running the campaign.

## Step 2. Identify Your Target Audience

After establishing the campaign's goals, the next step is identifying the target audience. Segmenting the employee population allows for tailored messaging that resonates with various demographics within the organization. As we have already discussed, age, job role, and location can be used to create segments of your population that will assist you in creating more effective messaging while also maximizing your efforts.

Utilizing your employee personas will enhance this process. At this point, your campaign should be laid out in two sentences:

- {GOAL} Our goal is to increase participation by 15% in the Lunch & Learn Series events this August.
- {AUDIENCE} We are targeting employees working at our main office location who will most likely identify with our two office worker personas: Cliff and Susan.

## Step 3: Craft the Core Message

A compelling value proposition will be the foundation of any successful marketing campaign you run. In step three, we will develop the core of our message using the value proposition as a guide.

To do this, we need to use our goal to determine what we make our value proposition about. In this case, we are attempting to make a sizable impact in participation within our Lunch & Learn events this August. We need to understand some basic information about the events to craft our core message:

- Who can attend?
- What will be discussed?
- Where is it held?
- When will the events take place?
- Why would someone benefit from coming to one of these events?

For this example, we'll use the following details:

- Employees who work at the main office can attend.
- Each event will cover a different topic under the general topic of mental health in the workplace.
- It will be held in Building A's Event Center.
- There will be four events, starting at 12:30 p.m. each Friday during the month of August.

# Marketing Your Well-being Program

At Propel, our planning phase prioritizes getting all of the details before we attempt to answer the “why?” This ensures all relevant details can be factored in. The time of day or the subjects discussed can dramatically affect the value an employee takes from the event. Once we are straight on all these pieces of information, we can answer the “why?”

Why does it benefit an employee to attend one of these events?

- Attending a Mental Health Lunch and Learn event enhances employees' awareness and understanding of mental health issues and strategies for maintaining good mental well-being.
- The event provides networking opportunities for employees to connect with colleagues who share an interest in mental health, building community support.
- Employees learn practical strategies and acquire resources to improve their mental health, such as stress management techniques and mindfulness practices.

We then order our marketing copy as follows:

Headline

Value Proposition 1

Description (who, what, where, when)

Value Proposition 2

Call to Action

## Marketing Your Well-being Program

Depending on the type of marketing asset, you may have to modify the messaging structure to make sure everything fits. However, this is a good outline that you can work from across all of your marketing assets.

Perhaps in this example, we have the following marketing copy outline:

{HEADLINE} Your mind is like your phone: it needs to be recharged regularly. Learn how in our Mental Health Lunch & Learn Series!

{VALUE PROP 1} Learn practical strategies to improve your mental health, even during the most stressful of days at the office.

{DESCRIPTION} Employees at the main office are invited to participate in a series of four interactive lectures focusing on different aspects of mental health in the workplace. These events will take place every Friday at 12:30 p.m. throughout August at the Event Center in Building A.

{VALUE PROP 2} Make connections with colleagues who are also interested in learning about and improving their mental health.

{Call to Action} Register to receive a free PDF guide from one of our presenters or simply drop by the Event Center each Friday in August!

The headline is an opportunity to sneak in a brief value proposition, ensuring that if people only read one sentence of your marketing materials, they would get the main idea.

## Marketing Your Well-being Program

Though we won't go too much into detail here, these two value propositions will have passed our quality assurance testing and resonate with our target audience and our personas. If they do not, consider alternative value propositions.

You will notice that the Call to Action uses a value-add benefit (the free PDF guide) to encourage people to register ahead of time. If you have a way of offering something extra, it will do two things:

- provide you with ongoing feedback about how people are responding to your marketing campaign, giving you the opportunity to make adjustments if needed
- give employees an instant way to engage when they encounter your campaign, increasing the likelihood of them continuing to engage when it comes time for the event series

Many well-being leaders promote their events well in advance, yet they tend to lose momentum by failing to engage employees right away. If an employee takes the time to read or interact with your communication materials, encourage some kind of action immediately to create a deeper connection with the initiative you are marketing.

For planning purposes, we can boil our core message down to the main value proposition:

Participate in our Lunch & Learn series to learn practical strategies for improving your mental health at work.

Now, our outline will look like this:

- {GOAL} Our goal is to increase participation by 15% in the Lunch & Learn Series events this August
- {AUDIENCE} We are targeting employees working at our main office location who will most likely identify with our two office worker personas: Cliff and Susan.
- {Core Message} Participate in our Lunch & Learn series to learn practical strategies for improving your mental health at work.

## Step 4: Select Your Campaign Style and Communication Channels

Choosing the right communication channels is essential to ensure that the campaign reaches your audience effectively. In our last chapter, we discussed the three main types of marketing campaigns:

- channel-based
- initiative-based
- broad-based

The selection of the right strategy has a lot to do with the goal we established in Step 1. If your goal is focused on improving the engagement of a highly targeted portion of the population, a channel-based campaign might prove the most effective since you can select the channel that is right for your niche.

In our example, we might select an initiative-based campaign, considering that we are aiming to boost awareness of and participation in a specific initiative. To ensure as many individuals see the marketing campaign as possible, we want to use more than one communication channel.

# Marketing Your Well-being Program

Based on the segments you are targeting, as well as what you know of the habits of your employees in these segments, select the most effective and time-efficient channels. While employees may respond very well to a well-produced video trailer for the initiative, it may not be the most time-efficient for you. If there is not enough time, committing to producing a video could jeopardize your campaign timeline and leave too few days to market your initiative.

In our example, we will select email, flyer, and digital sign communication.

Our outline:

- {GOAL} Our goal is to increase participation by 15% in the Lunch & Learn Series events this August
- {AUDIENCE} We are targeting employees working at our main office location who will most likely identify with our two office worker personas: Cliff and Susan.
- {Core Message} Participate in our Lunch & Learn series to learn practical strategies for improving your mental health at work.
- {Campaign Style and Channels} We are using an initiative-based campaign style that will use email, printed flyer, and digital sign communication.

This is as far as we'll use this outline format. We will use this information to complete the remaining steps.

## Step 5. Design Your Marketing Assets

In this step, either you or someone on your team will be tasked with designing marketing assets for the campaign. It is vital that steps 1 - 4 have been completed prior to this step, as they will guide the selection process for the imagery and layouts.

As we have discussed, consistency in branding is crucial for effective marketing campaigns. All assets should reflect your organization's identity while reinforcing the campaign's core message. Key elements of effective design, such as color schemes, typography, and imagery, should align with your overall branding strategy.

This step will likely be one of the longer steps in this process, so prepare accordingly. A description of your imagery and desired look will assist you or your team as the design process is carried out.

Before completing the design on marketing assets, Propel gathers key information from our clients such as:

*Colors: e.g., Follow main branding guidelines, using our Black, Cobalt, and Orange*

*Typography: e.g., Headings done in the Roboto font with body text done in Montserrat*

*Imagery: e.g., Mix of attention-getting graphics and images of relaxed colleagues enjoying insightful group discussions*

*Sizing: ex. 8.5x11" PDF flyer and 1920x1080 px digital sign*

# YOUR MIND IS LIKE YOUR PHONE.

**It needs to be recharged regularly.**

**Learn how in our Mental Health Lunch & Learn Series!**

Employees at the main office are invited to participate in a series of four interactive lectures focusing on different aspects of mental health in the workplace. These events will take place every Friday at 12:30 p.m. throughout August at the Event Center in Building A.

**Make connections with colleagues who are also interested in learning about and improving their mental health!**

Register Today!



Register to receive a free PDF guide from one of our presenters or simply drop by the Event Center each Friday in August!

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**3Pdigital**

[www.3PWellbeing.com](http://www.3PWellbeing.com)

Propel creates custom communication for our clients. This example shows both a flyer and digital sign version of a campaign focused on treating your mental health like you would your phone - recognizing its need to be recharged.

Ask several colleagues and your communications team for opinions on past marketing materials to figure out what worked well and what needs to change. Continuous feedback will keep your designs from becoming stale and ineffective.

## **Step 6. Plan the Campaign Timeline**

A detailed timeline is essential for successful campaign planning. This timeline should include key milestones, deadlines, and deliverables to ensure that all aspects of the campaign are executed on schedule. Set your campaign up for success by meticulously ensuring that it stays on track to meet the goals you have identified.

The campaign timeline will specify when specific marketing assets are released as well as when they are to be switched out. If you are running a campaign with physical flyers or posters, indicate in your campaign planning documents when the flyers/posters go up, when they are to be switched with a different flyer/poster, and when they are to come down.

Relevant timing also plays a critical role in message delivery. If you have the ability to align your marketing campaign with other relevant initiatives, events, or current topics, employees will be more apt to notice your communication.

For instance, an accountant firm might use the fact that it is headed into the tax season window to advertise a new mental health initiative. It would be unwise, however, for that same firm to run an initiative on work-life balance as it asks its employees to work late!

Synchronizing efforts across different channels will also be vital to maintain a coherent message. We address how to maximize this multi-channel approach in our next chapter.

## **Step 7. Executing the Campaign**

Clearly defined roles and responsibilities within the campaign team are necessary for smooth execution. Each team member should understand their tasks and how they contribute to the overall campaign goals. Coordination strategies, such as regular check-ins and updates, will ensure cohesive execution.

Flexibility and adaptability are also crucial during the campaign. Being prepared to adjust strategies based on real-time feedback can enhance the campaign's effectiveness and address any unforeseen challenges.

Your well-being champions will also be pivotal team members. The planning process should make provision for answering all team member questions and addressing concerns regarding execution well in advance of the go-live date.

If you have diligently planned your marketing campaign, the execution should be the easy part!

## Step 8. Measuring Success

To gauge the campaign's effectiveness, you must establish metrics and key performance indicators (KPIs) to track performance. This may include participation rates, employee feedback, and engagement levels. Gathering and analyzing data allows you to assess what worked well and what needs improvement.

While we note this is Step 8, we often perform this during Step 1 as well. We go about gathering baseline data and spelling out which metrics most clearly tie in with our goal to give us the most clarity around what we hope to see at the end of the campaign.

The importance of adjusting strategies based on feedback and results cannot be overstated. Continuous monitoring ensures that the campaign remains relevant and effective. If you include immediate calls to action within your marketing assets, this will become even easier to gather.

Take several weeks to process the “halo effect” (when positive impressions in one area lead to positive impressions in other areas) from your marketing campaign on other events and initiatives you are running. Many times, a successful effort to gain traction in one area will have a halo effect on other areas, resulting in improved engagement across the board. These metrics will be hard to directly attribute, but they are worth mentioning in a summary report as possible correlations.

# How Propel Builds The Perfect Marketing Strategy

These practices can be nuanced and challenging to implement if you cannot dedicate the time or resources to developing a full-featured marketing engine. For many of our clients, Propel's detailed program marketing and communication support is the key reason they chose us as their well-being program partner.

The Propel well-being platform we custom-build for each of our clients is a powerful marketing tool in and of itself, allowing organizations to send targeted messaging, display specific content depending on the individual's associations, create specific well-being champions sections with tools and engagement initiatives, allow the display of employee success stories and feedback, and much more. However, we feel so strongly that marketing is a vital part of building a successful well-being program that we offer complementary marketing asset design, strategic planning, and messaging.

We work through each of the steps outlined in this eBook to create a powerful marketing engine that can run without adding more to your plate. Our full-service approach to building and customizing well-being programs for our clients creates world-class programs fully integrated into the organizational culture, and more importantly, delivers the sustainable outcomes our clients requires.

If you would like to learn more about how Propel can help you implement the strategies discussed here (and many more like it), set up your free, [30-minute strategy session here](#).