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EDUCATIONAL EVENT MARKETING  
*APPROACHES, STRATEGIES, TACTICS*

- Jake Aull 7/08

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EDUCATIONAL EVENT MARKETING APPROACHES – *INITIAL STRATEGIES*

- Jake Aull 7/9/08

1. Start by writing down any pre-existing, **concrete information you have on the educational event**, such as its mission, its content, etc. Also address such questions as “Why does your organization wish to conduct events? What more do you want for them? What are the benefits?” Keep these in mind while conducting below processes.
2. Up-to-date, on-going **Secondary research** and data captures of the industry financials, behavior and trends are of course always helpful to understanding the audience.
3. The best way to determine optimal segmentation, positioning and possibly event content, is to **survey**. A random, quantitative survey of the industry could reveal a lot—in fact statistical significance could be achieved with as few as 300 responses. Qualitative open-ended questions could be included on the survey as well.
4. The **research objective** of course for the above would have to be well-defined in advance. But highly beneficial information to learn could include:
  - a. *Perceptions of greater industry education content and players,*
  - b. *The use of competing content available online, and corporate universities (are they growing competitors? Or can they be developed as customers? For that matter, are corporate HR/training directors good targets for disseminating educational event promotions to multiple people?),*
  - c. *Geographics as related to customer cost (where are customers located and if possible, how far are they willing to travel and how much are they willing to spend in time and money for an entire event?),*
  - d. *Optimal event length and appropriate broadness vs. focus of event primary content,*
  - e. *The market’s desired knowledge to gain,*
  - f. *Optimal channels, learning styles (hands-on? Site visits? Electronic blended?) and locations for learning,*
  - g. *Overall high- or low-involvement industry advertising buyer behavior response (this might require a different, later, target segment survey),*
  - h. *And attractions to specific media, style and/or metrics,*
  - i. *And current market perceptions (if any) of the seminar.*
5. In addition to primary research (or as a substitute only in dire circumstances where the budget and time just doesn’t allow for primary research), **environmental scanning and trend analysis** should be performed. These can help **forecast** your future sales, market predictions and some competitive awareness. These can also reveal instrumental best approaches for content, delivery and the event marketing.
6. A detailed **competitive analysis** should be done to determine key players and their
  - a. *Positioning and event content,*
  - b. *Primary customer segment profile (and strategy),*
  - c. *Price as related to positioning and segment,*

- d. *Channels, learning styles (hands-on? Site visits? Electronic blended?) and geographics,*
- e. *And Market share/position.*

Much of the above could be determined from secondary research and trend analysis, and by attending competing events. Additional important info could be gained from primary research (discussed above).

7. Secondary research, but especially the primary research could then drive the **SWOT Analysis** – a big step towards optimal positioning.
8. **Research results** could also then help direct positioning and content. Of course the SWOT and existing position and perception in the market would have to allow to convincingly sell certain content and positioning. For example, all the data may reveal that the best product positioning would be to offer whatever content is desired by the greater market (projected through statistical significance), that is not already amply covered.
9. You may plan on offering a conference with multiple sessions of diverse focus, but have too many different, potential (seemingly equal) options. You can then perform conjoint analysis from your primary research to determine the **optimal combination of conference topics** for the surest, greatest audience desire. This serves when the different possibilities in combination are too many to survey respondents.
10. The **segmentation strategy** must be consistent with the overall marketing and positioning strategies. Demographics, job position – these might or might not be best positioning for an educational event that appealed to many different job roles.
11. For the above positioning, **benefit segmentation** might fit best. For example, Colgate toothpaste surveyed the U.S. market and discovered a lot of desire for specific attributes not already offered in toothpaste. Colgate’s positioning actions in response were highly successful. The results are that today we buy “taste-good” toothpaste for our children, tarter-control toothpaste for the “dentally-concerned,” and whitening toothpaste for those so inclined. Everybody in different job positions of transportation may desire education. Many people across varying job roles may seek specific knowledge benefits.
12. If the desire or need is to **compete in parity**, on the same grounds as others with positioning and content, then high spending is required to convince the market that this educational event is better than the competition. Promotions, through advertising and other tactics, are heavily relied upon to grab a low-involvement audience and prompt them to act a certain way in response. Guerrilla marketing can likewise be very beneficial.
13. Regardless of parity competition, it is instrumental to remember that an educational event is an experiential deliverable. Even simple things involving room, signage or seating changes can **deliver a more differentiated and memorable experience** to the customer, helping repeat purchase and word-of-mouth (WOM).

14. **All of the above** gives the info necessary for understanding (as well as optimally and specifically identifying):
  - a. *Past market positioning perceptions of the event,*
  - b. *Competitor strength, positioning and the market's perceptions (ideally this would include a perceptual map output),*
  - c. *Advertising high- or low-involvement buyer response behavior,*
  - d. *Content and degree of focus desired in the industry,*
  - e. *Content not provided (or at least not enough) in the industry,*
  - f. *The market's desired learning styles, channels and locations,*
  - g. *Marginal event price, elasticity and comparisons, and optimal price positioning strategies for educational events,*
  - h. *The appropriateness and ability to offer the above (c - h) to the market,*
  - i. *And consequently, the optimal overall product and positioning strategy.*
15. With clearly identified and detailed product and positioning, should be able to now **identify the maximum benefits** to the audience, and the typical customer profile (this might be vague if using benefit segmentation). Also may want to identify some basic buyer behavior attributes and advertising and image response. For example, prior expectations might be that customers were utilitarian and high-involvement. But if they're low-involvement in response to advertising and image, then cater to their mindset with promotions.
16. The aforementioned can reveal the event **USP**, primary customer benefit, and promotional **positioning statement**. Likewise, it is important to verify positioning alignment between the 4Ps. For example, if the positioning is "the premium option for transportation educational events," then capability is necessary to truly give that to the audience (and future surveys should confirm it). Likewise, price should be the premium price. Event locations and the overall event experience should be premium – far above "adequate". Promotional spending, channels and media should be premium – and should show it. The brand needs to do everything to project itself as premium – and that usually requires premium cost.
17. There should also at this point be full agreement on **marketing objectives, event objectives**, and financial/other objectives.
18. All of the above can now help envision **promotional strategies** and integrated marketing communications plan (**IMC, below**). These too need to be consistent with the positioning strategy, buyer behavior and desired image to project. Separately, **PR strategies** &/or a PR plan for the event should be developed. These need to operate hand-in-hand with the IMC plan & fit the same positioning. PR planning can include a trend analysis and present/future balance sheet analysis.
19. Since an educational event promotes, by nature, some level of knowledge and expertise, that can be enhanced by offering newsworthy article suggestions or content to related publications. This can be part of a PR plan, **developing media relationships** that increase the likelihood of event press release articles and positive media coverage.

20. The **marketing budget** is of course typically determined as a % of projected revenue – the greater the desired revenue, the greater the budget. A typical generic guideline is 10%, or 15% to 20% of desired revenue for the first year for a new product or if new to the market. Regardless, industry-specific guidelines can also be found. For example, there is research citing about 5-6%(?) as the most typical marketing budget % of projected annual revenue for B2B tech firms.
21. All promotions should be part of a tactical, multiple media, **IMC plan** (*below*). Some stats suggest that it generally takes anywhere from 3 to 5 (and even up to 7; *see “determining mail” below*) unique impressions of a promotional/brand message for the audience to even recognize and remember it. But this depends on separate channels working cohesively together. A typical buyer behavior model includes seeing multiple media advertisements (print &/or online) and promotions before finally going to the website to learn more about a product/service of interest. Hopefully, some relevant clues to buyer behavior and media preferences were learned from initial research and can be applied here. The IMC plan should of course include media tactics, timelines, reviews and controls (*see “measurement” below*).
22. The IMC plan, in addition to media, would include particulars such as concepting the **event brand theme title and imagery** to fit with the USP and positioning statement. It should also address issues such as the importance of metrics to the prospects. Will they believe the primary benefit statement? Will they want proof, or would they care enough to pay to attend (what did the initial research say)?
23. Just as parity product positioning is generally undesirable, promotions should also not compete in parity. In other words, if everyone else is utilizing a common medium, image &/or messaging, that is exactly what to avoid – or else be lost in the shuffle. If everyone is email marketing, it all winds up in customers’ junk bin. If everyone is mailing letters in envelopes, they wind up in customers’ trash cans. It is important to harness the relevant, valuable **points of differentiation** – for positioning, messaging and media. This is why guerilla and viral marketing strategies grow in popularity. Advertising and image response can also be tested before implementation.
24. Metrics are easy to come by for **measuring effectiveness** in online promotions – its much more difficult to measure print promotions (this doesn’t mean they’re less effective). One way is direct marketing (DM; *see “determining mail” below*). Offering an immediate, desirable incentive for the prospect to contact the provider allows the provider to measure effectiveness of specific promotions. Another method is to remove strategic marketing print media from a campaign to measure and compare overall results. Regardless, a consistent strategy for effectiveness measurement should be employed and reliably conducted. It should also drive the IMC plan’s, specific, regular, tactical reviews and controls. Results should be meaningful and trusted.
25. The aforementioned will produce **project effectiveness and comparative results** for future promotional guidance.
26. It’s good to remember the more that promotions **grab attention and clearly, consistently offer direct benefits** to the prospect, the fewer unique impressions

required for buyer response (&/or, the greater the amount of responses; more below).

27. Don't muddy the waters with promotions or messaging. At this point, ***there should be one primary*** product, one primary benefit, one primary message, and one primary brand image to project for one primary target. As long as these are consistently adhered to, ***the goals should be achieved.***

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EDUCATIONAL EVENT MEDIA/  
INTEGRATED MARKETING COMMUNICATIONS

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A.) Below are some typical production guidelines and

**Timing for Educational Event Promotions**

(below this timeline are metrics approaches to budgeting, and financial and response projections).

*A.1) (Suggestions in blue represent annual conference promotions with 3 mailers.*

*Source: Marvin Calvin, "Marketing – How to Boost Attendance," [www.pcma.org](http://www.pcma.org))*

**14 mo out** – prepare theme, logo & introduction for unveiling at current yr event. Prepare exhibitor pre-prospectus. Prepare call for speakers. All info s/b on web & in vendors' newsletters. PR team has parallel timeline.

**12 mo** – unveiling (above) at current event.

**10 mo** – Distribute mtg dates to press & affiliated associations for their info calendars. Begin exhibitor mktg. Thoroughly analyze current yr's evaluations & adjust program to address the issues.

**9 mo** – initial mailer, & put online. Prepare confirmation letterhead, envelopes & fax cover sheet. *Be sure to send the initial mailer during budget planning time for your industry, typically 7.5 months out.*

**7.5 mo** – Prepare early-bird registration mailer. Prepare press releases & contact lists, complimentary trade show passes, & mktg materials for inclusion in exhibitor service kits. Place event promo ads in journals & association's publications.

**6 mo** – send early-bird mailer. *The goal is to encourage early registration, mailed 4 wks before the early bird cutoff date (or 9 wks before hotel cutoff).*

**4 mo** – Mail preliminary program, have online. Develop final program mailer. Send list of pre-registered attendees to exhibitors for their pre-event promos.

**3 mo** – Send out final program mailer. Organize PR. Place ads in pubs. Send last-chance email. Prepare promo splash for next year's event for closing ceremony. Prepare your own on-site presentation materials. *Minimum 3 wks before hotel cutoff. Ask for the order & close on it. You should be able to determine whether an additional mktg push is needed*

*by figuring out the date, historically, by which ½ of attendees are usually registered. If the #s are lagging at that point, you may want to add another mailer, broadcast email, or fax to the mix. For ea clement on the timeline, provide all final deadlines. All dates s/b realistic, firm & shared w/ all parties as early in mktg cycle as possible.*

**A.2) (For a less-involved seminar with fewer mailings, start 5 months out. These below are combined/averaged suggestions from sources: “The 10 Biggest Mistakes to Avoid When Mktg Seminars & Workshops,” <[www.HowToMarketSeminars.com](http://www.HowToMarketSeminars.com)>. & “Event Mktg Communications Overview,” <[www.morningstarmultimedia.com/blog](http://www.morningstarmultimedia.com/blog)>.**

4.5 months out - Website

(should also include past conf info, info on org & its goals, sponsors, press kit, registration & info)

- Save the Date postcard\* or email

18 wks out - strategy devo

15 wks out - copywriting

12 wks out - design

10 wks out - printing

8.5 wks out - your mailhouse to prepare your mailing\*

7 weeks out - mailer arrives

- Emails to coincide w/ mailers, 2 weeks, & possibly day-before reminders

0 weeks – finished day-of event brochure

*Add'l materials include:*

- Sponsorship letters/kits
- posters/banners
- ads
- press kits/releases
- flyers for students

*\*NOTE:* If you plan to do a couple of different mailings – say, at 10, 7 & 5 wks – you may even need to add some more wks to this timeline. Also, testing mail lists (through segmentation & measurement on response qty, & purchase qty) can be very helpful and revealing.

## **B.) Determining size and randomness for mail lists\***

(Source: Ralph D. Elliott, “Marketing Seminars & Conferences - Sample size for testing”):

1. Take your goal amount of responses,
2. & divide by your projected response rate to get “x.”
3. Now take your larger sample size,
4. & divide it by “x” to get “n.”
5. Tell the list vendor to give you every “n”th name from a truly randomized list.

*\*NOTE:* Of course think about your method of mail list reduction first, though. This strategy is based on scientific statistical accuracy randomization. You might want the list favored more towards demographics of location, or job title, etc.

### **C.) New Study Breaks the Ceiling on Direct Marketing Responses**

(Source: Fischer, Tricia. [Printing News](#). 31 Oct 2005 .

<<http://www.allbusiness.com/marketing-advertising/advertising/992735-1.html>>.

***Test: Which generates a higher response rate, letters or self-mailers?***

The control was a traditional two-color letter package with an envelope. The test was a four-color self mailer. The test outperformed the control by 20 percent. As lives become busier, it makes sense that self-mailers, which seem to take less time to read, will continue to pull strong response rates.

***Test: Does a combination of higher color and higher paper quality make a difference in response?***

With paper prices increasing, and marketers looking for ways to control costs, paper and ink choices are increasingly important. For this test, the control package was a three-color self-mailer produced on a light matte paper. The test package was designed in four colors on heavy gloss stock. Both campaigns contained the exact same message and graphic design. Again, the higher quality applications outperformed the control-this time by 48 percent. It's well worth testing to see if you can control your costs through more cost-effective paper and less expensive production runs, but do not assume that these elements really do not matter.

### **D.) Budgeting & Projecting Returns for Big Educational Events**

*(Suggestions in blue represent annual conference promotions with 3 mailers. Source: Marvin Calvin, "Marketing – How to Boost Attendance," [www.pcma.org](http://www.pcma.org))*

Mktg & promotion account for **11.1%** of event expenses.

Assume your attendance goal = **1500**

an increase of **5%** over the previous yr

your registration fee = **\$500**.

Generates **\$750,000** in gross rev.

Out-of-pocket expenses = **\$82,500**

= **\$55** for ea registered attendee.

Direct mail return at most = **3%**

If you mail at least **550,000 total pieces**

net **1,500 attendees**.

**Budget = \$82,500**

cost per mailer = **\$1.65 including postage**.

*People need to see your message at least **3x** before they respond,*

*cost per mailer would drop to **\$.55** (Since this is a low unit cost, you would need to be creative with your distribution costs by including the piece with your newsletter or polybagged with your journal to save on postage.)*