

REALTIME COMMUNITY

Marketing Strategy 2020

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PROGRAM SUMMARY



Jazmin Mora

Program Lead



Malkia Chionesu

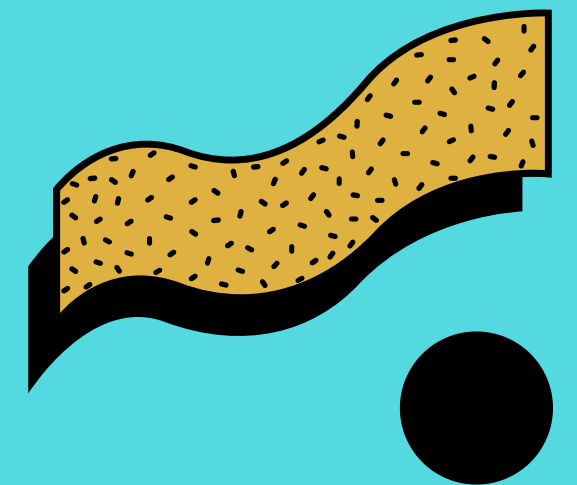
Relationships Manager



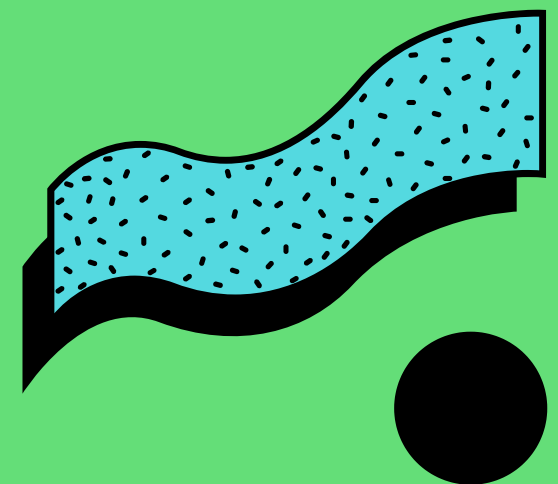
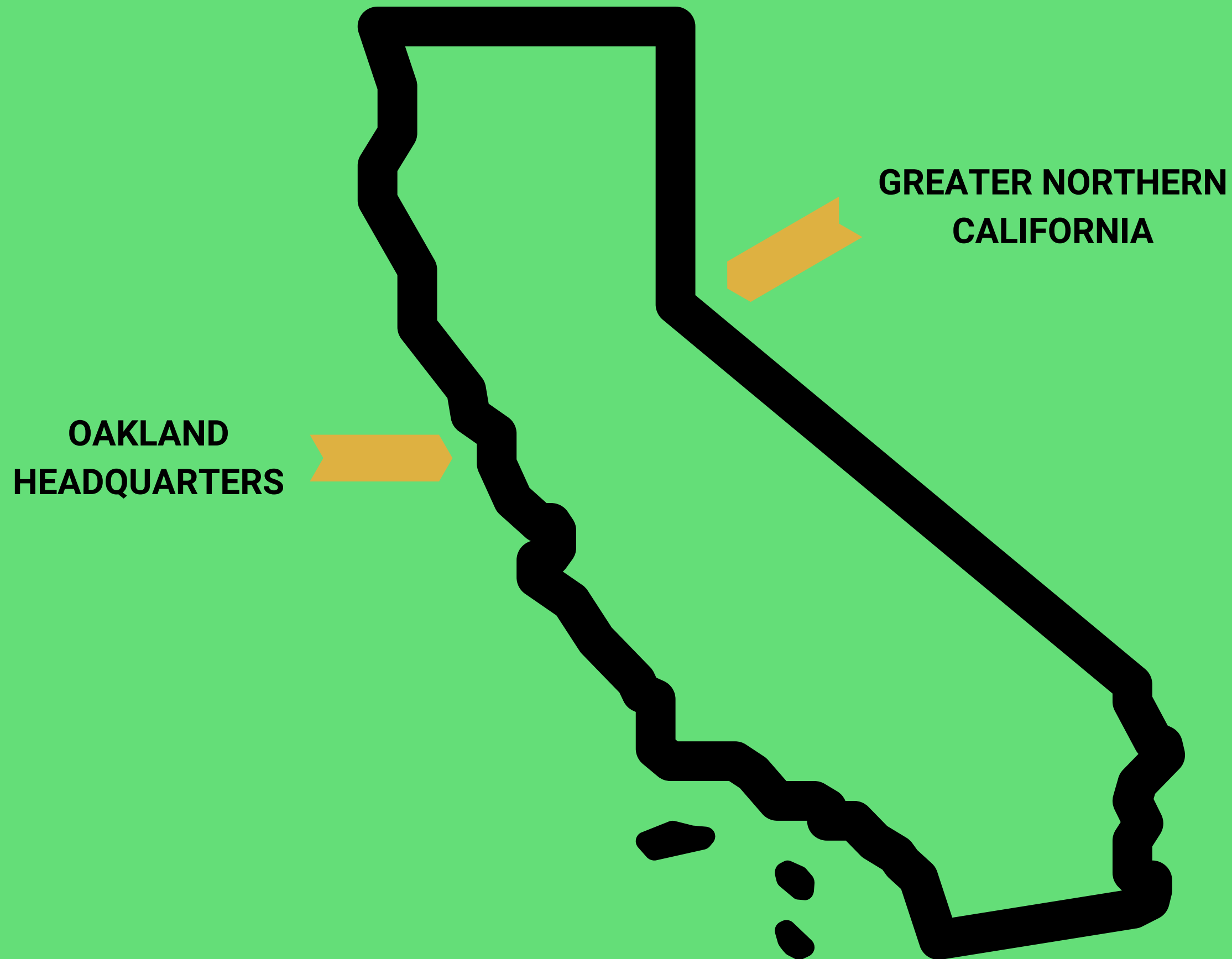
Alexandra Bigley

Community Engagement Manager

PROGRAM TEAM



LOCATIONS



MISSION



RealTime Community's mission is to empower Kaiser Permanente employees to use their skills for good and get work done in the community through creating collaborative opportunities with local nonprofit organizations.

SWOT ANALYSIS

Strengths

- Utilize Stretch@KP brand equity to scale simultaneously
- Leverage existing technology to execute
- Active ecosystem (8 participating nonprofits)
- Additional nonprofits are interested in joining ecosystem
- KP employees want to explore ways to give back, deeper connection to mission.
- Innovative way of responding to nonprofit/KP employee needs
- Ties back to Hatch Group research and design principles

Weaknesses

- No existing technology beyond Google Drive to facilitate experience (UX)
- Role clarity with core team/Stretch team
- No real metrics in place to measure impact

Opportunities

- Redefine CSR as an employee engagement benefit
- Adopt Stretch@KP platform
- Communicate with intermediaries
- Align with functional areas around community health goals
- Productize infrastructure for other organizations' CSR efforts

Threats

- KP overall direction with new leadership
- Autonomy in regions
- Ownership, expertise
- Scalability beyond Oakland

PROGRAM INITIATIVES

Goals:

- Increase KP employee program participation rate
- Impact community health through capacity building
- Scale program's footprint

Objectives:

- Increase participation rate by 33.3%.
- Increase capacity building by 40%
- Scale to 2-3 additional NCAL cities

Outcomes:

- Establish a blueprint for scaling initiative
- Create value through impact not = qualitative over quantitative feedback

OVERARCHING PROGRAM INITIATIVES



MARKETING SMART GOALS

Goals

1. Launch new prototype, V2 of program
2. Improve Brand Reputation/Overall Awareness
3. Increase Program Presence
4. Optimize Brand Positioning
5. Increase Website Traffic
6. Implement field tactics (events)
7. Break Into New Markets
8. Retain Existing Participants
9. Optimize Participant Online Experience
10. Increase Participant Advocacy

Objectives

1. Define the go-to-market strategy by mid-May so we can create all content before launch.
2. Gain and retain a 90% share of voice by the end of the calendar EOY 2020
3. Introduce two WOM marketing strategies by Q4
4. Initiate a survey in Q2/Q3 to 100+ participants for feedback and alignment
5. Try three traffic generation methods every month to increase traffic by 3% MoM
6. Acquire 10% more participants MoM by the end of the first fiscal year
7. Launch program in 2-3 other NCAL cities by EOY
8. Retain 18%+ existing participants
9. Strive for a net promoter score of 80%+.
10. Implement referral pilot program by the EOY

TARGET MARKET



Industry: Healthcare

Audiences:

1. Community-Based Organizations
2. Kaiser Permanente Employees

AUDIENCES & PERSONAS



Estelle

**Executive Director,
Nonprofit**



Basics:

- Age: 35 - 55+ (Millennial > Boomer)
- Location: Oakland, CA
- Archetype: Leader

Goals:

- Maintain the financial health of the company, improve logistics, and communication.

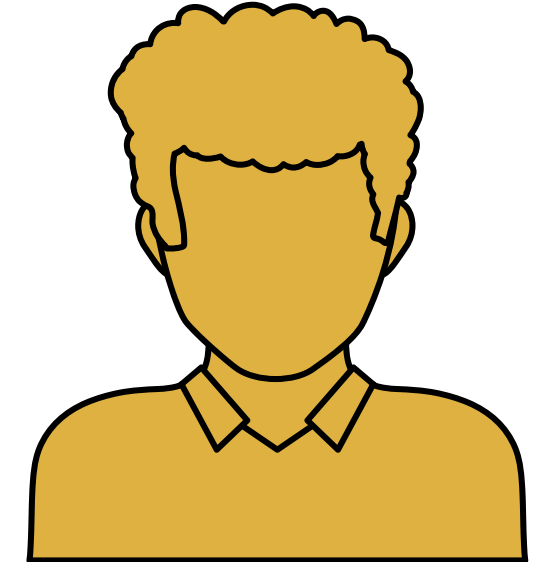
Challenges: Staffing and Volunteer Capacity.

Bio:

- Estelle is the Executive Director of a nonprofit organization and is the ultimate decision-maker. She is responsible for managing the financial health of the organization. With multiple direct reports, her status meetings consume much of her time and this leaves her firefighting instead of actively addressing issues and gaps.

Ernest

**Kaiser Permanente
Biz Ops Employee**



Basics:

- Age: 24-39 (Millennial)
- Location: Oakland, CA
- Archetype: Coach

Goals:

- Fulfill Community Health annual goal.
- Establishing a connection to cause.
- Using skills for good to impact CBOs.

Challenges: Looking for ways to leverage their skill sets externally for good.

Bio:

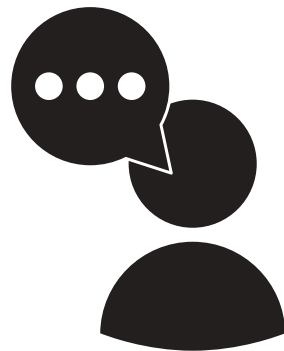
- Ernest is a mid-level Kaiser Permanente employee who has spent the last two years working as an individual contributor on a company-wide initiative. He is responsible for managing his own body of work with very little day-to-day oversight. With zero direct reports, his assigned workload only takes up 80% of his time, leaving him anxious to to use his skill sets in innovative and meaningful ways.



Features



Scale



Feedback

Kaiser Permanente

Features

- RealTime Community
 - Match KP employees with nonprofits on pro bono projects

Scale

- One location with potential to scale nationally and immediate plans to scale regionally
- Eight participating CBOs

Feedback

- Employees feel more connected to cause
- The value add to nonprofits is immeasurable due to resourcing constraints

Tableau

Features

- Mission Projects
 - 3-week sprints
 - data projects(focus on the data to solve problems
 - For every \$ an employee donates to a cause, Tableau will match it, and the company will make a financial match for every hour an employee spends volunteering.

Scale

- Depth is more important than breadth
- Two geolocations
 - India and Denver

Feedback

- Success isn't just in the numbers—it's about the value of the experience for both employees and our non-profit partners.

Macquarie Group

Features

- Civic Edge Program
 - Small teams of Macquarie's future leaders are paired with nonprofit organizations facing critical challenges. Over the course of many intensive weeks, Macquarie teams work to design solutions that address their nonprofit partners' needs and build their capacity.
 - Run with Taproot

Scale

- Houston and New York City
- People from all departments within the business work on teams servicing one local nonprofit per city at a time.
- 3-month commitment
- Winner gets a \$10Kgrant for their nonprofit partner

Feedback

- Pipeline for professional development

Johnson & Johnson

Features

- Global Pro Bono
 - Four-week stint in Latin America
 - Use skills to help NGOs run more efficiently and meet their goals.
- Pro Bono Network

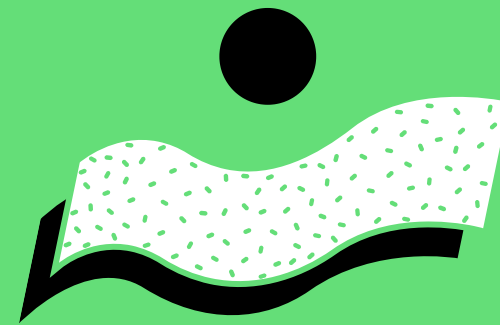
Scale

- 11 employees selected for inaugural year - 2017

Feedback

- A new found sense of purpose
- Company initiative aimed at tackling social causes

MARKET STRATEGY



Product



An ecosystem designed to connect skilled Kaiser Permanente employees with community-based organizations on pro bono projects.

Price



Complimentary to users. Operational and resourcing costs absorbed by program.

Promotion



- Offline
- Referral
- Social Media
- Email Marketing
- Digital Marketing
- PR & Events

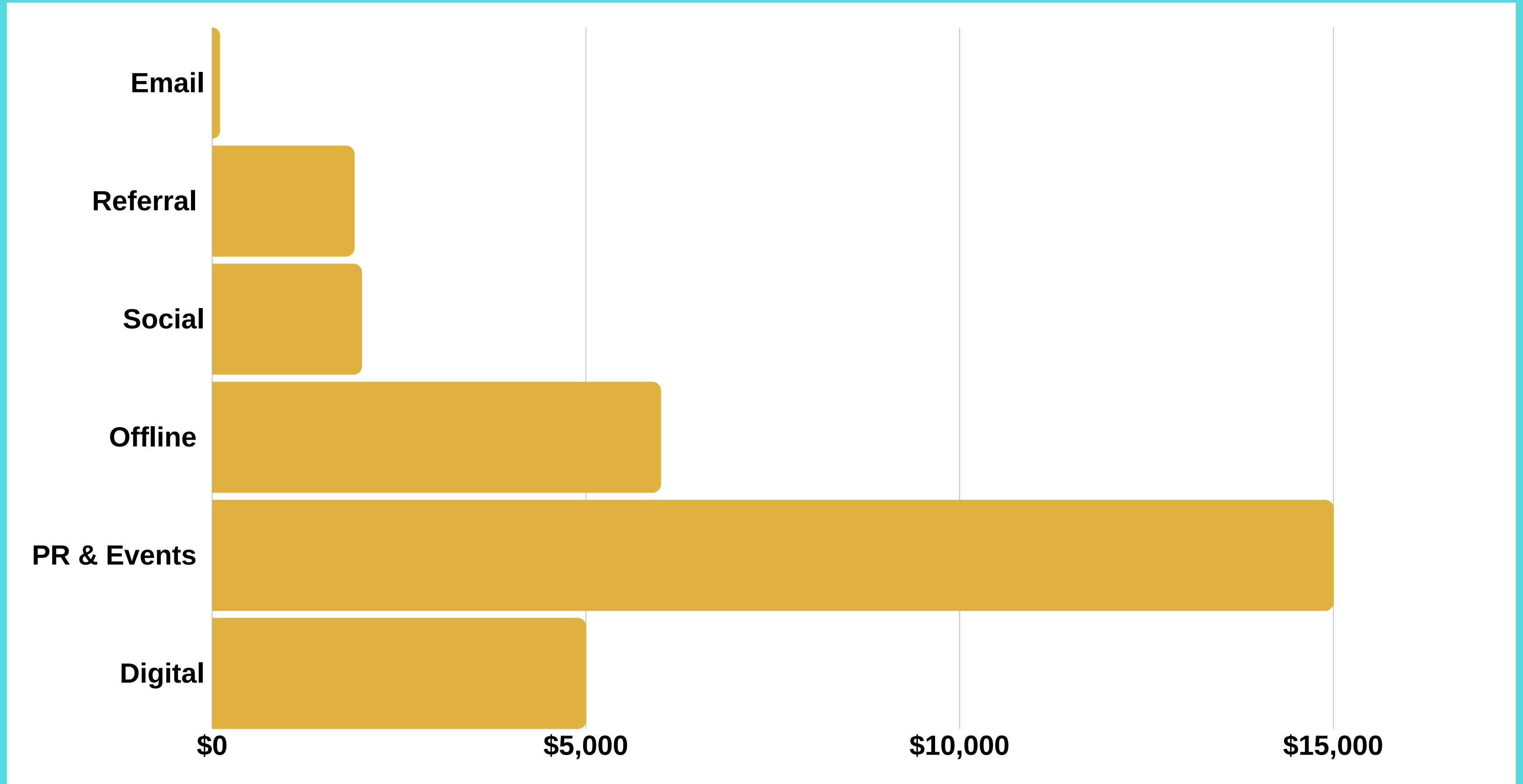
Place



- Stretch platform for KP employees
- External Website for CBOs

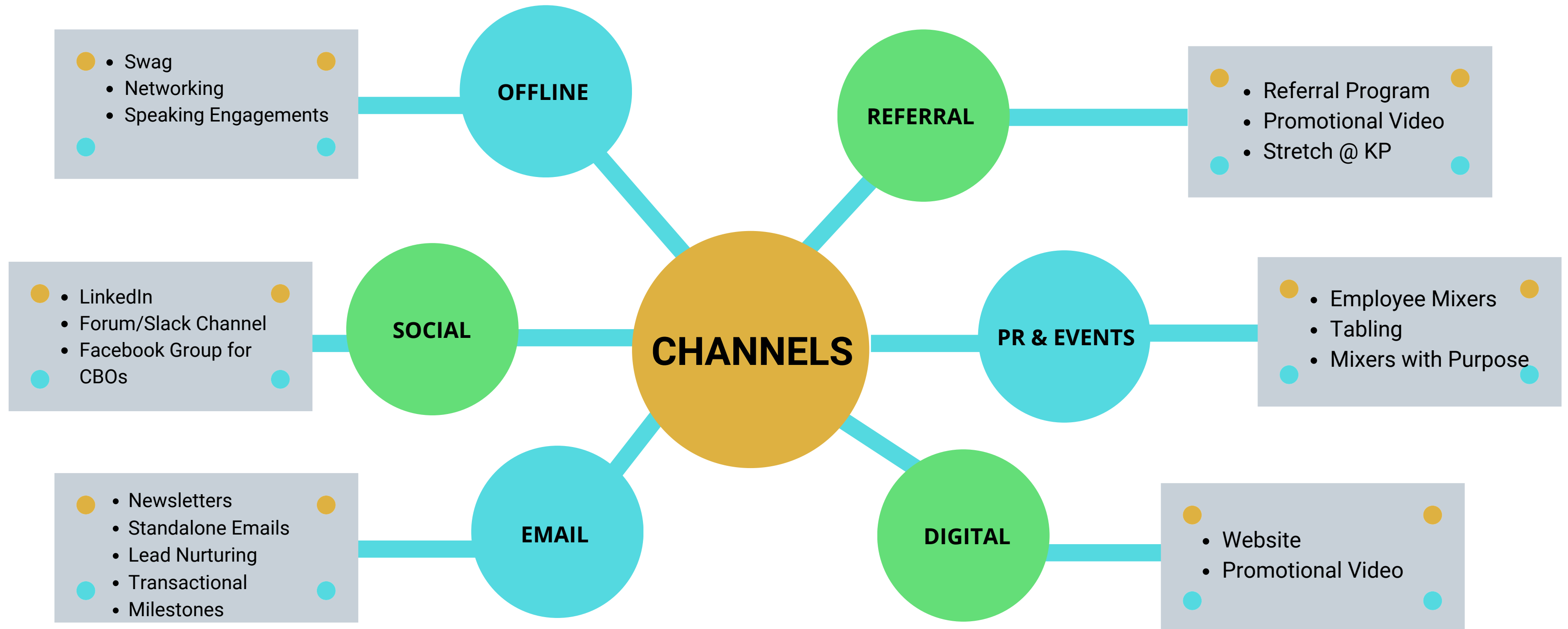
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BUDGET

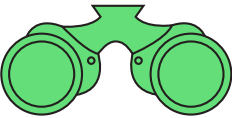







MARKETING CHANNELS

CHANNELS




KP Employee ENGAGEMENT EXPERIENCE

Awareness  Search	Engagement  Evaluation	Nurture  Engagement	Transact  What are the steps to access?	Customer Success  How do customers onboard and get support?	Advocacy  How do customers participate in advocacy?
CUSTOMER GOALS					
Find a Solution	Assessment	Is it valuable?	Get Access	Receive Customer Access	Share
TOUCHPOINTS					
<ul style="list-style-type: none">• Events• Conferences• LinkedIn Ads• Internal Partnerships<ul style="list-style-type: none">◦ Community Benefit/Health◦ GenKP	<ul style="list-style-type: none">• Case Studies• FAQs• Onboarding	<ul style="list-style-type: none">• User Account• Email Drip Campaign• Webinars	<ul style="list-style-type: none">• User Profile• Apply for Scoped• Project(s)	<ul style="list-style-type: none">• Project Toolkit• City Lead Liason & CBO Partner Check-Ins• Online Helpdesk• Surveys	<ul style="list-style-type: none">• Case Study Participation• Referrals• Reviews• Amassadorship

MARKETING FUNNEL KP EMPLOYEES: The goal of the volunteer marketing funnel is to ensure prospects or participants are invested in the mission/cause.



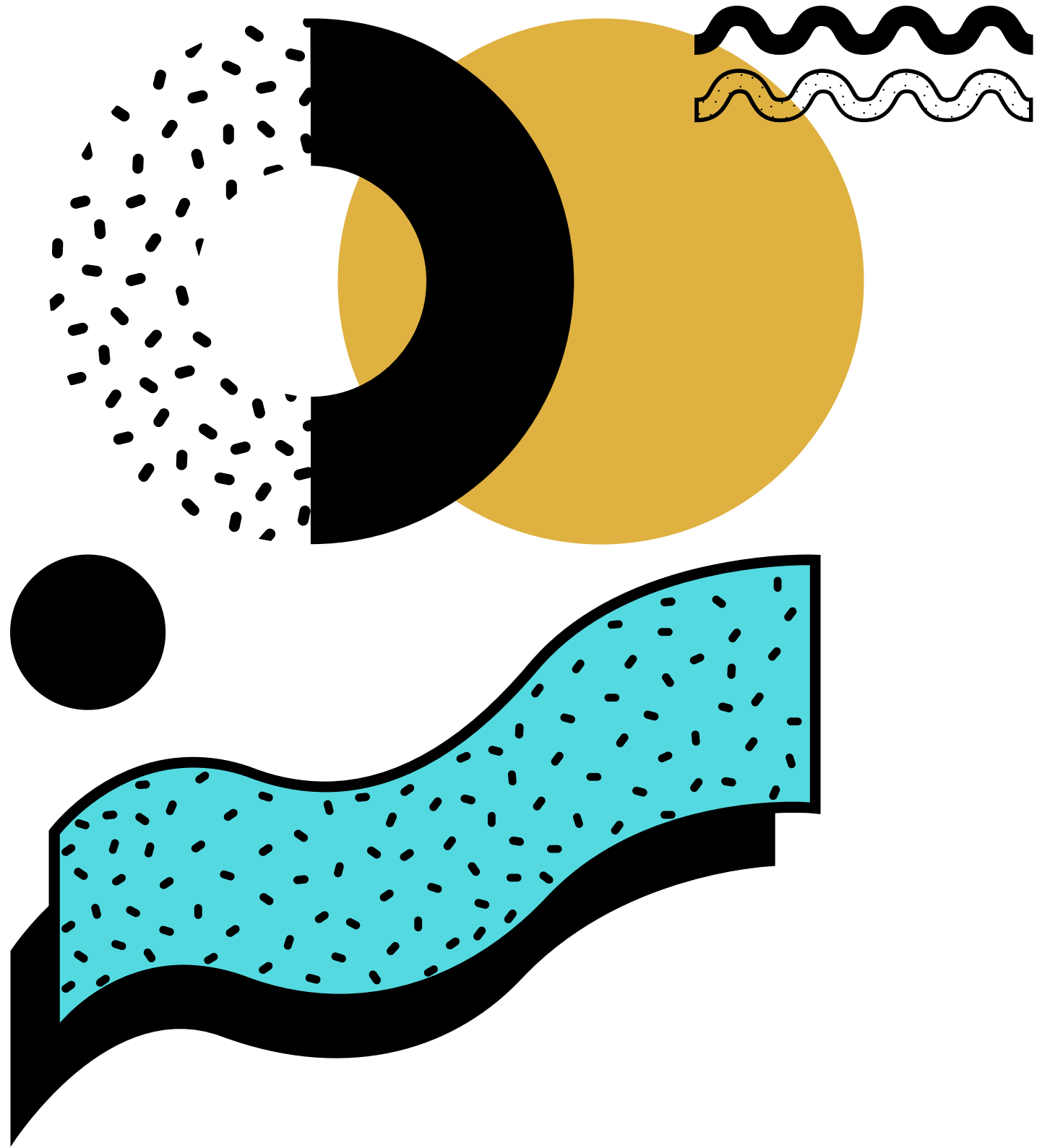
CBO ENGAGEMENT EXPERIENCE

Awareness  Search	Engagement  Evaluation	Nurture  Engagement	Transact  What are the steps to access?	Customer Success  How do customers onboard and get support?	Advocacy  How do customers participate in advocacy?
CUSTOMER GOALS					
Find a Solution	Assessment	Is it valuable?	Get Access	Receive Customer Access	Share
TOUCHPOINTS					
<ul style="list-style-type: none">• Google• Social Media• Events• Conferences• SEO• WOM	<ul style="list-style-type: none">• Case Studies• FAQs/Qualifications• Benefits Package• LOA/Contract	<ul style="list-style-type: none">• Introductory Meeting/Webinar• Drip Campaigns• Establish relationship with City Lead	<ul style="list-style-type: none">• User Profile• Scope Projects• Evaluation of needs vs. KP Talent	<ul style="list-style-type: none">• City Lead Check-in• Coaching• Forum/Shared Channel• Events	<ul style="list-style-type: none">• Referrals• Reviews• Speaking Engagements

MARKETING FUNNEL: The CBO funnel, or program participation funnel, is to guide prospects step-by-step through the entire service process (so they don't get confused, LOST, or leave).



APPENDIX



BUSINESS MODEL

RealTime Community
Model



KP Benefits

Employee Benefits

CBO Benefits

Community Health Wellness

MARKETING VOCABULARY 101

- **Buyer Persona**
 - A semi-fictional representation of your ideal customer based on market research and real data about your existing customers.
- **Call-to-Action**
 - A call-to-action is a text link, button, image, or some type of web link that encourages a website visitor to visit a landing page and become of lead.
- **Churn Rate**
 - A metric that measures how many customers you retain and at what value. To calculate churn rate, take the number of customers you lost during a certain time frame, and divide that by the total number of customers you had at the very beginning of that time frame.
- **Click-Through Rate**
 - The percentage of your audience that advances (or clicks through) from one part of your website to the next step of your marketing campaign.
- **Conversion Path**
 - A conversion path is a series of website-based events that facilitate lead capture. In its most basic form, a conversion path will consist of a call-to-action (typically a button that describes an offer) that leads to a landing page with a lead capture form, which redirects to a thank you page where a content offer resides. In exchange for his or her contact information, a website visitor obtains a content offer to better help them through the buying process.
- **Context**
 - If content is king, then context is queen. Serving up valuable content is important, but ensuring that it's customized for the right audience is equally (if not more) important.
- **Conversion Rate**
 - The percentage of people who completed a desired action on a single web page, such as filling out a form.
- **Landing Page**
 - A landing page is a website page containing a form that is used for lead generation. This page revolves around a marketing offer, such as an eBook or a webinar, and serves to capture visitor information in exchange for the valuable offer. Landing pages are the gatekeepers of the conversion path and are what separates a website visitor from becoming a lead.

MARKETING VOCABULARY 101 CONT'D

- **Lead**
 - A person or company who's shown interest in a product or service in some way, shape, or form.
- **Marketing Automation**
 - While there's some overlap with the term "lead nurturing," marketing automation is a bit different. Think of marketing automation as the platform with associated tools and analytics to develop a lead nurturing strategy.
- **Net Promoter Score**
 - A customer satisfaction metric that measures, on a scale of 0-10, the degree to which people would recommend your company to others. The NPS is derived from a simple survey designed to help you determine how loyal your customers are to your business.
- **Qualified Lead**
 - A contact that opted in to receive communication from your company, became educated about your product or service, and is interested in learning more.
- **Return on Investment**
 - A performance measure used to evaluate the efficiency and profitability of an investment, or to compare the efficiency and profitability of multiple investments. The formula for ROI is: $(\text{Gain from Investment} - \text{Cost of Investment}) / \text{Cost of Investment}$, all divided by (Cost of Investment). The result is expressed as a percentage or ratio.
- **Search Engine Optimization**
 - The practice of enhancing where a web page appears in search results.
- **Social Proof**
 - Social proof refers to a psychological phenomenon in which people seek direction from those around them to determine how they are supposed to act or think in a given situation.
- **User Experience**
 - The overall experience a customer has with a particular business, from their discovery and awareness of the brand all the way through their interaction, purchase, use, and even advocacy of that brand.
- **User Interface**
 - A type of interface that allows users to control a software application or hardware device. A good user interface provides a user-friendly experience by allowing the user to interact with the software or hardware in an intuitive way. It includes a menu bar, toolbar, windows, buttons, and so on.

VOICE & TONE

Character/Persona

- Ernest
- Welcoming
- Fun
- Friendly

Tone

- Empathetic
- Genuine
- Irreverent
- Passionate

Brand Voice

Language

- Conversational
- Enthusiastic
- Simple
- Informative

Purpose

- Inform
- Inspire
- Engage
- Amplify