

## **Why Isn't Anyone in the Classroom? Market and Promote Safety Training More Effectively!**

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Training doesn't just "happen;" it requires many things to get students into the course. One is marketing/promoting it; which is important whether it's for in-house training or outside consultants.

Marketing and promoting training require a strategic plan. This paper will look at and discuss many ways to effectively market and promote your training and what works best! It will also discuss various aspects of marketing/promoting training, including the following:

- Marketing plans; why they need to be strategic, and what goes into one
- How Porter's Five Forces apply
- So-called "elevator pitches," and why they're important (and no, you don't have to be in an elevator to do one)
- Promotion of in-house training
- Various means/tools of marketing/promoting training
- What you can do even with a limited budget,
- What works best of all (you may be surprised)!

Included are some learning objectives for the readers so that, at the conclusion of this paper, they will be able to:

- Explain the need for marketing training to outside groups
- Explain the benefits in promoting in-house training to company employees, supervisors, and management
- State the most effective way to "market" training and explain why
- Demonstrate an "elevator pitch" for some training program
- Develop a marketing plan for their training

# Why Marketing Plans Need to Be Strategic and What Goes into One

Not only does training not just “happen,” but also neither does marketing. Like most things (both in business and in life) they require careful planning. An organization’s training plan may include such things as:

1. Administration of training
2. Performing a training needs assessment (TNA)
3. Crafting well-conceived learning objectives (LOs)
4. Developing the training curriculum and lesson plans (LPs)
5. Delivery of the actual training (jobsite, workstation, classroom, distance, and/or computer or web-based training (CBT/WBT))
6. Verifying achievement of LOs (hands-on, testing, etc.)
7. Evaluating the training (both formative and summative)
8. Continuous improvement of the training

It should therefore come as no surprise that marketing requires careful planning and a strategic plan in particular. But why does training need marketing? Training needs marketing mostly because of human behavior and the “buying process.” There are several “influences” on the buying process, including:<sup>1</sup>

- Social Influences:
  - Culture and subculture
  - Social class
  - Reference groups and families
- Marketing Influences:
  - Products
  - Prices
  - Promotion
  - Place
- Situational Influences (for products more so than services like training):
  - Physical features
  - Social features
  - Time
  - Task features
  - Current conditions
- Psychological Influences:
  - Product knowledge
  - Product involvement

The above influences combine to affect the consumer decision-making process (CDMP). This CDMP is as follows:<sup>2</sup>

1. **Need recognition:** Do I need training? If so, what training(s) do I need? When do I need it? How often do I need it?
2. **Alternative search:** Are there *other means* (besides training) to meet my needs? Are there *other types* of training available? Are there *other providers* of the same training? Are there *other trainers*?
3. **Alternative evaluation:** How do all of my options from #2, above, compare? What are the costs? Which will meet *my training needs* the best?
4. **Purchase decision:** How will what I choose ultimately matter and affect me? Will I get the training that I ultimately needed?

5. **Post-purchase evaluation:** Am I happy with my purchase or do I have “buyer’s remorse?” Am I now able to do anything different because of the training?

Were it not for human behavior (and the factors affecting it), all things would always follow a natural and logical process. People would always do what they are told; when given compelling directions or information, they would follow through; and they wouldn’t decide to do things differently than directed. But we know that life and human behavior don’t work that way. There are seven factors affecting human behavior, including:

- **Pain:** We tend to avoid anything that we perceive as painful, especially if we’ve experienced it before (such as “bad” training).
- **Pleasure:** We tend to be attracted to anything we perceive as pleasurable, also if we have previously experienced it (like “good” training).
- **Priorities:** Our priorities don’t always align with those of others (one might value going to training, whereas someone else might value production more).
- **Perspective:** Our view of the world is influenced by what we do, our experiences, and who we are; obviously these differ from person to person (if you are a fellow trainer, too, you are more likely to see it as important and valuable).
- **Perceptions:** How we each perceive our world (such as seeing training as meaningful versus seeing it as a necessary evil).
- **Psyche:** Id, ego, and superego: Who we each are affects all that we do (training included).
- **Parents:** This includes our genes and how we were raised (one might have grown up in an environment that encouraged lifelong learning, and another might not have).

Since we are all affected by the above seven factors, we need to try to exert influences over others in an effort to get them to do things that at first appear to be in opposition to their natural tendencies. This is where marketing comes in. Marketing can help to convince us to do certain things—buy a product, attend an event, contribute to a cause, etc. Marketing can even help get us to attend training, be it an in-house program or one by an external vendor. Our decisions regarding purchases of almost any type are predominantly emotional, so all of the above impacts decisions regarding what training, providers, and trainers we prefer to use.

So, if we agree that training needs marketing, and we agree that marketing needs strategic planning, then training needs a strategic marketing plan (SMP). Here’s an outline of what an SMP might include: An outline for a Strategic Marketing Plan (SMP) includes the following.<sup>3</sup>

1. **Cover Page**
2. **Executive Summary:** A brief (~1-page) summary of just the highlights of the SMP.
3. **Table of Contents**
4. **Company or Organization:** This could be the Training Department (TD).
5. **Mission and Vision (M/V):** Develop and write your own mission and vision statements for your training (these should be specific to the TD and different from the overall organization’s M/V). These are two separate, albeit related, statements. *Mission* is what you do, have been doing, and have done. *Vision* is what you aim to be doing in the future.
6. **Background and Introduction:** Who is the training department, where have they been, and where are they going?
7. **Situational Analysis:** Analyze the key environmental factors that are most likely to impact the training or TD in the near future.
8. **Marketing Planning:** Analyze internal strengths and weaknesses and external opportunities and threats facing the TD. This is not just a list; be sure to do the analysis.

- a. **Marketing Objectives:** What are you trying to accomplish by your marketing: increase awareness, promote a new training initiative, or another objective?
  - b. **Target Markets:** Who are you marketing to internally and/or externally: attendees, their supervisors, other organizations, others?
  - c. **Marketing Mix:** How are you going to “reach” your target markets: emails, social media, posters, memos, mailers, videos, your training, etc.?
  - d. **Other:** What else do you need to include in order to execute your SMP?
9. **Implementation and Control:** How are you going to put your plan into use? Who will “run” the plan?
10. **Summary:** An overall summary of your SMP.
11. **Financial Analysis:** What are the hard costs for your plan? What internal and external resources are also necessary for your plan’s execution?
12. **References/Citations**
13. **Optional Parts:** (Add these only if they add value to your SMP):
- a. **Porter’s “Five Forces Model:”** A very useful way of looking at the various “forces” that exert pressure on an organization.
  - b. **Portfolio Model:** This is a way of looking at your various parts of your organization needing marketing; in this case, your training and TD.
  - c. **Business Strategy and Tactics:** These would be the overall strategies for the greater organization (marketing strategy/tactics are above).
  - d. **Business Information:** Information about the overall organization that is helpful to your SMP.
  - e. **Production or Process:** This would be some information regarding your organization’s overall business.
  - f. **Management Structure and Style:** This would be a description of the organization’s management structure and style and how it might affect the SMP.
  - g. **Other Information:** Anything else that is relevant to the SMP and its implementation.

## How Porter’s Five Forces apply

Dr. Michael Porter’s “Five Forces” are economic ones that act on an organization and affect its profitability and thus its viability. They are a combination of the following:

- Threat of new competition (the new trainer “on the block”)
- Threat of substitute products or services (online training)
- Bargaining power of customers or buyers (expecting certain “preferred” pricing)
- Bargaining power of suppliers (training manuals, etc.)
- Intensity of competitive rivalry (another vying for my clients)

Just as training can be for both internal as well as external “customers,” obviously these five forces can similarly represent both internal and/or external customers. Applying these forces to an “outside” (or external) trainer seems obvious. For instance, if a competing training firm markets to my clients, then there are forces that act on me to market in order to compete. If there are new products (i.e., CBT/WBT) then I need to market better to compete again. My clients might indicate that they want to use me but wish to only pay what my competitor would charge. They might also insist on a “preferred” rate or a discount for quicker payment of invoices. One or more suppliers may provide manuals that are cheaper for them to mass produce than for an individual trainer to do so, making it more difficult to differentiate oneself from one’s competitors. There might be two trainers who compete “head to head” for a certain client or territory, and this rivalry exerts pressure on both.

But what about in-house trainers and their internal “customers:” Do these forces still apply or “ring true” in those settings? Yes. Here’s how they do (in addition to the affects of human behavior as discussed above). Let’s take them again one at a time and in the same order as above:

- **Threat of new competition:** In the case of an in-house trainer/TD, the new competition can actually be several different things including:
  - A new trainer in the TD who grabs the attention of management or trainees.
  - Outside trainers who can deliver the same training without the “burdens” that come with a full-time employee.
  - Alternatives to classroom or other “live” training, such as CBT/WBT (see the next example). Also, this could be the in-house production of CBT or training videos.
- **Threat of substitute products or services:** As suggested above, online training (from either an external vendor or created in-house) is becoming more and more common and prevalent. External vendors of these compete amongst themselves but, in doing so, they market intensely to various organizations.
- **Bargaining power of customers or buyers:** In this example, those in an organization want to know more and more, “What am I getting for my ‘money’ and my time when I attend or when I send my workers?” These are an in-house trainer’s “customers.” Even a trainer’s direct “customers,” the trainees themselves, can exert pressures or forces on a trainer by whether they willingly attend the training and the “public” feedback that they give.
- **Bargaining power of suppliers:** Suppliers can be the same as above: an outside vendor of training manuals for instance. The pricing for supplies might make the training less beneficial in management’s eyes and/or the training may suffer from a limited budget for “niceties” that truly help make the training better (e.g., food and drink, prizes, learning aids, etc.).
- **Intensity of competitive rivalry:** This could be another in-house trainer, an outside trainer, or even trainers at other organizations recognized as high quality and. Therefore, potentially more desirable. Any of these could be a threat to a trainer or TD.

Porter additionally says that organizations have two choices when it comes to competing; you can either “differentiate” yourself or your products or you can compete based on (low) cost. He argues that one cannot do both simultaneously and to be “stuck in the middle” is the least desirable position. Some others disagree, including Dr. Alfred A. Marcus, who cites Best Buy, IKEA, and Toyota as examples of companies able to combine the two (low cost and high quality) into “best value.”<sup>4</sup>

A recent example of this is the “certified renovator” training for compliance with the EPA’s “renovation, repair, and painting rule,” or RRP as it’s called. Initially, there were few trainers who were themselves certified by the EPA to provide the training. It was relatively easy to “compete” as demand exceeded supply. Since then two things have occurred; demand has plummeted and there is now an overabundance of trainers. The forces from this have resulted in a low-cost decision-making approach by most “customers;” it has become a “commodity.” Trainers can either compete and market themselves based on cost or likely not compete (at least not well).

The OSHA 10- and 30-hour trainers have suffered a similar fate. Years ago, there weren’t many, and one could easily differentiate themselves. Now there are many who are

authorized by OSHA to provide it. There is still some demand but competition is somewhat intense, resulting in mostly low-cost comparisons. Additionally, this has had the result in low-quality and non-compliant training and trainers, with OSHA responding by enacting stricter regulations on the trainers. Porter's "Five Forces" cannot be ignored, and truly impact trainers and training alike.

## So-called "Elevator Pitches" and Why They're Important

The term "elevator pitch" refers to a brief (30-seconds long), marketing-type overview of a product, service, plan, and so on, that is used to induce interest and/or excitement in the topic. It was termed an elevator pitch because of the brief nature of a typical elevator ride, but it doesn't have to occur in an elevator. The ability to convey the essence of your training in a brief and meaningful manner and create some "buzz" or excitement for it can make all the difference in bringing trainees into the classroom with a positive, want-to-be-there attitude. Trainers know that a student's pre-training attitude can be either an asset or a detriment to how they perceive the training (and its quality and value).

## Promoting In-house Training

The term "marketing" can be a bit of a turn-off to some. It conjures up the image and feeling of a "huckster" or snake oil salesman, plying useless products or, if not useless, then less than savory images of a stereotype, such as a used car salesman. So, let's use the term "promote" instead for in-house training.

As discussed above, due to natural human behavior and tendencies, as well as very real "market forces," training needs to be "actively promoted." So now the question is how? There are several means by which in-house training can be promoted:

- **Internal communications:** These can be emails, memos, etc. The more attention that can be drawn to it the more positive buzz, and vibe can be generated in advance of it.
- **Word of mouth:** This can be purposeful elevator-type pitches, as well as talking it up with others and asking them to do the same in their groups (formal and informal).
- **Actual "promotions:"** Hold contests, do giveaways, offer door prizes to the first to sign-up or arrive, etc. They can be merely an "easy" entry (all those attending) or they can require entrants to "do" something like write a blurb about the training that you can use in future promotions. Maybe solicit examples of how attendees have actually benefited from or used the training (either at work or at home).
- **"Advertising:"** This can be posters and faux ads placed in other in-house places and communication. This is different from the first one above on general communications that discuss the training. In this case, it's a graphic display that resembles as actual ad. Maybe it can be placed on an internal website for "What's Happening" or "Goings On" that many organizations have. Perhaps place easy-peel stickers on paychecks, advertising your next training (similar to the ever-present and prominent stickers on newspapers these days). Be creative!

## Various Means/Tools of Marketing/Promoting Training

So, since we just discussed promoting in-house training, let's turn our attention to how to market external training by an outside training vendor. Obviously, we are talking about a more traditional view of marketing. Here are some marketing methods for outside trainers (in addition to those listed above for in-house training promotion):

- **Social media:** Obviously, this is a very large and omnipresent method today. You can start a Facebook page for the training and/or the trainer. You can tweet about an upcoming class. LinkedIn is a must, as it is the professional social media outlet today. There are others, of course, including Yahoo, Google, YouTube, and many less well-known ones as well.
- **Advertising:** Traditional ads can be placed in a wide variety of media, including magazines, newspapers, radio, TV, and online. Certain industry-related journals can be directed well to your target market.
- **Online:** This really deserves its own emphasis. You can pay to have your online presence come up, based on certain search terms (e.g., OSHA, safety, training, etc.).
- **Direct mail:** Despite email (see below), direct or mass mailing is still done frequently, especially with training courses and seminars.
- **Email blasts:** These can be most effective at drawing attention to your training efforts and programs. Registration information, links, or even forms can be embedded right into them.

## What You Can Do Even with a Limited Budget

Obviously, several of the above can be done even with little hard costs (though they may require "soft costs," such as labor and other resources). Depending upon the exact situation, one may be able to:

- **Increase word of mouth:** This is a non-cost method that just needs a little nudging. This might be real word of mouth, as in talking, or it could be tweets and other online discussions. Consider asking for "recommendations" on LinkedIn and putting "testimonials" or just quotes from trainees' evaluations of your training.
- **Use emails:** Don't buy lists; they often don't have many truly quality addresses. Accumulate lists of "decision makers" and colleagues. Sometimes, local associations (such as ASSE Chapters) will allow you to forward an email promoting a course, seminar, or conference to their Secretary who will forward it to the chapter members.
- **Post flyers or posters:** Let's say that you have a localized target market, you may actually be able to increase awareness just by putting up flyers on kiosks, stores, and other public venues as able and allowed.
- **Direct targeting:** You can contact and ask colleagues via phone or in person if they will attend, send their people, or at least forward on your request to others. They may be willing to send several if you make them a special offer directly.
- **Your Website:** Websites are not that expensive to put together and to get hosted these days. Even if you have it more professionally done, there is software (e.g., MS Frontpage) with which it's not that difficult to maintain your site and to put up new offerings. It just requires a little skill and time.

## What Works Best of All

So, of all of the methods available for marketing training, can you guess what one method arguably works best? According to many business consultants, it is (previous) training itself that is the best way to promote or market your training. Not sure why exactly? Think about it; in what other practice are you actually demonstrating your craft and service for your target customers? And even better, you're not even overtly marketing your service, and it usually isn't perceived as overt marketing, unless you're over the top and start actually discussing your services in the class (always considered "bad form," undesirable, and just not necessary).

Of course, this does require that the training is actually *good* for it to work in your favor. Bad training can also be successful marketing, but for your competitor(s), which is not what we typically want to achieve.

## Conclusions

Training is all well and good, but without sufficient marketing and promotion you may not get anyone into the classroom! So, keep on promoting and marketing your training strategically to achieve your training and "business" objectives.

## Endnotes

<sup>1</sup> Peter, J. Paul and James H. Donnelly, Jr. 2011. *Marketing Management: Knowledge and Skills*, 10<sup>th</sup> Edition. NY: McGraw Hill Companies.

<sup>2</sup> Ibid.

<sup>3</sup> Ibid.

<sup>4</sup> Marcus, Alfred A. 2011. *Management Strategy: Achieving Sustained Competitive Advantage*. 2<sup>nd</sup> Edition. NY: McGraw Hill Companies.