

MARKETING VOCATIONAL EVALUATION

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ABSTRACT: This paper presentation discusses basic market information gathering for the field of vocational evaluation. Starting with a discussion of service customers, the paper reviews the planning of marketing, assessing competition, developing advertising, sales promotion, and market research.

M. Chairman, attendees.

Congratulations! It is truly an honor to speak with representatives of a field that is fast becoming the newest of the professions. Vocational evaluation finally will be an occupation without the question, "But what is it that you do?"

Up until recently I did not realize the impact you have been having with handicapped populations for many years. From my position in the advertising/lithographic industry, I thought everybody merely decided what they wanted for vocation, and went around asking potential employers or placement agencies until they were hired. But now that I am with you, I realize the tremendous science--and information--that is available in the matter of job selection.

Defining Your Service

Let us get down to basics. Before you begin planning your marketing, you need to satisfy two steps. Let us begin our exploration on marketing vocational evaluation with the first marketing principle: define your product. What is the service you want to market?

You have formed an excellent reputation in assisting handicapped people to realize their occupational potential. Since the 1950's there has been more or less full employment opportunities in the U.S. for the able-bodied, so you have seen to it that people who have some disability could find a place alongside the able person. To do this you tested, measured, evaluated and proved that disabilities do not necessarily relegate a person to non-existence.

This expertise was well-developed when industry and insurance began to cry out for your help in Worker's Comp cases. Now state and federal government realize that you hold the science for releasing or retaining disability cases in the matter of truly-needy relief rolls. But this is not the end of your booming expansion.

The U.S. now has a tremendous displaced worker problem--added to the able-bodied, hard-core unemployed--an enormous population with little awareness of your well-developed methods. Many of our agencies are now expanding to include these unfortunates. There are no physical or mental handicaps in this group--just the monumental handicap of trying to figure out the best vocation given the person's makeup.

But your future does not stop there. Have you heard about the tens of millions of employed persons who are actively searching for "something better" to do? They have no one to turn to for the quality of vocational evaluation that could lead to better-informed job selection.

Define your service before you even think about marketing. Look at your choices by type of population and source of business:

Physically/Mentally handicapped persons--usually come to you from government or private sources or families of individuals.

Worker's Compensation cases--referred by insurance companies and lawyers.

Disability cases--referred by judicial and medical professions or individuals themselves.

Displaced workers--referred by industry, union and government.

Hard-core unemployed--referred by government and JTPA.

Chemical abuse clients--referred by medical professionals and penal groups.

Ex-offenders--referred by prison system.

Distressed employed--referred by individuals themselves, or employment services.

Young people, not yet employed--referred by high schools, and colleges.

While many of you now handle cases from several of these populations, your expansion goals are moving slowly, and for good reason. Can you really handle a 50-year-old who's lost his life job at the same time as a mentally-retarded youth? Can you mix severely-

disabled former workers with alcoholic rehabilitation clients?

How can you express what you do to each of these sources for more business? The words you use to explain your ex-offender evaluation program to the prison system must be different from the words you use to families of the physically-handicapped. Your appeal to the legal and medical profession for Worker's Comp cases must be different from your appeal to PIC councils.

I assure you that you cannot be everything to everybody. You cannot sit under one banner and the same message, and hope to attract more of each of these problem areas. You will not be credible. Even though you are incredibly competent for all areas.

The marketing professional will tell you to go after the largest market just for percentages' sake. I'm not going to tell you that, because you must find your own niche, your own specialty based on personal expertise and preferences. All I can do is warn you that temptation for expanding into various markets at the same time could do you in. It may appear to be easy for you now to define your service, but future expansion areas are closer than you may imagine.

The other point to satisfy--along with defining your "product" or service--is you must be aware of your rate of production. You cannot be comfortable with your selling prices without knowing how much service you can offer per given time period. The fact of the matter is whether you are appealing for funding or establishing a price for private caseloads, you must know your level of efficiency and why you work at that rate of speed.

Your rate of production depends both on attitude and on the tools you use. As all of you know, some agencies press for a maximum turnaround, others for a more slow-paced, thorough evaluation. In either case, your marketing plan must be able to defend what your attitude is. In all your

cases, however, there is pressure for more efficiency.

New evaluation tools on the market are responding to this change in your field. Historically, you were able to spend a great deal of time with a client; now there simply is not enough money available in the U.S. economy to allow leisure in production. Your major tools must be geared to evaluate the majority of your clients in less time than you were allowed to spend in the past. Other evaluation methods should remain available for you to use with those clients who are more difficult to assess or who present greater problems for evaluation.

I think our company--Career Evaluation Systems, Inc.--has now experienced this pressure for more efficient evaluation tools from both ends. When our human factor testing and computerized scoring method first came out 7 years ago, we were criticized for being too fast; now there is pressure from you evaluators for us to speed up our systems even more. Seven years ago a 5 1/2-hour test battery plus computer scoring by mail was the latest thing. Now that we have a 3 1/2-hour test and instant telecommunication scoring we find ourselves in a marketing dilemma of competing with a 1/2-hour evaluation method!

Do not get me wrong. I am not on the side of faster is better. I am merely explaining this as a concept to keep in mind in justifying your rate of production. My company has taken a stand that 3 1/2 hours of tests are necessary for a quality evaluation tool, and that telecommunication scoring will save evaluation funds in the long run over producing changeable software packages. With this as full knowledge, we will market our product and service no matter what the faster methods are trying to do. Around the office we have a saying that we have really become the Cadillac of evaluation systems, but now we are priced like a Chevy.

This is the kind of knowledge you must have before you begin your

marketing. Define your service and be comfortable with your rate of production.

The Aspects of Marketing

Now we are ready to talk about marketing. Before we go another step, though, can any of you remember who a janitor was? He (it was always he) kept the fire stoked in the furnace, shoveled coal, could fix anything--electrical, plumbing, carpentry, your car--and kept the premises in good order. he was either very friendly or very grumpy, but there was no question about who the janitor was and what his jobs were.

Today janitors are called building engineers. They rarely do any of the above tasks themselves, though they are always busy explaining why something happened as it did and promise to "have a man over right away to fix it." They are always polite and politically minded, and often can be mistaken for the administrator.

Do not tell anyone, but "marketing" is to "building engineer" as "selling" is to "janitor." Do not let the title of marketing get out of hand; what you are trying to do is sell. You want to interest people in spending their money on your program. What you do in the name of marketing shouldn't keep you from actually getting the selling done.

Perhaps we should define four separate aspects of marketing. To name them, there is (1) the planning stage, (2) assessing the competition, (3) the advertising stage, and finally (4) sales followup.

The Planning Stage

Planning your marketing attack is crucial. We have already defined your service and made you comfortable with your rate of production. Now we need to pinpoint who you wish to sell your service to. It's called "identifying your markets."

If you are in a position to apply for community or government funding, either you already have a tried and true method of attracting these funds or go out and hire an expert. This is a highly stylized method of selling your services and rarely works in amateurs' hands.

Another increasingly popular source for funding is appealing directly to industry. The impetus in federal government programs now is to encourage business to support local services such as yours. The important point to remember in approaching business and industry, however, is that you must thoroughly describe how giving money to you will benefit them. Do not be critical of this attitude; they have limited funds for community service, and need to justify that no money is "wasted." An area where they surely would benefit is your expertise in identifying particular jobs for people who would otherwise end up on relief rolls or at extensive worker's compensation. Businesses (and for that matter all taxpayers) want to see the unnecessary handouts to individuals decrease. Other areas where business will benefit should be based on particulars in your community.

For those of you who service the community on an individual basis by direct counseling fees, you are into what is called "consumer marketing." You have to plan your marketing attack through general public media. This approach includes signing up for local radio & TV talk shows, getting articles about your organization in newspapers, as well as paid advertising campaigns which we will get into later.

All these different market approaches, however, need one additive you may not know about. The classic example in marketing textbooks is the liquid entertainment field. Let's say you want to introduce a new beer on the market. First you hire a dozen or so shills. These people walk into assigned bars, and ask for the beer that no one knows about yet. They talk about the virtues of the new

product, sometimes refuse any alternative drinks that are offered, and walk out. This goes on for a period of time, until the beer distributor calls on the bar. Lo and behold, he has this great beer for sale, and the bartender says "I have had a lot of people ask me for that lately--it must be really popular--yes, I will take some cases."

This is called "creating consumer demand." If your marketing target recognizes your name and service when you make contact, you have a much better chance of a sale. Perhaps you could use the "shill" approach--maybe done with phone calls to your identified markets--or other methods that call for creating demand, such as requesting your satisfied clients to talk about your organization. Getting your name generally recognized in your market makes selling a lot easier and less expensive.

The final step in planning is to establish a budget for your marketing. Naturally you don't have many dollars--no one does. But you have to spend some money to attract business, and preparing a budget is important. There are two rules of thumb you can go by: (1) for every 100 contacts you make, your marketing is doing well to attract 10 inquiries, not all of whom will buy your services; and (2) for every case you handle, allow about 20% of the price you charge for your marketing budget. Later we will explore how to use these funds wisely.

Assessing the Competition

Do not forget the competition. Establish, first, how you're different from your competitors. Make a T-chart. List what you do on one side of the chart, and what your competitors do on the other side. If you do not know what your competition does or how they charge, find out. Even if the facts are hard to take--even if they are cheaper and better than

you--you must know your competition before you can plan your attack.

This is where the creativity begins. Let me give you an example. Computer scoring of tests in our evaluation system is done by telecommunications with personal computers. We recognized that some of our competitors sell software packages to do on-site computer scoring, and we were getting criticism from potential users about our scoring methods. There was only one thing for us to do; make telecommunications the more attractive approach, putting the competition on the defensive. Because we truly believed that our method was superior, we only needed to state why.

Since we promise computer system updates, never with an additional charge (and changes are imperative fairly often in computer software!), we raised the question in the buyer's mind of how much he's going to be spending with competition every time their software is revised. We also made the statement that we would not allow evaluators to use something of ours that was outdated simply because there's no money to buy the updates. Plus we also gave the computer's modem software free of charge with our systems, so the computer user has telecommunication access to all sorts of other data bases. In other words, we launched an offensive--because we were sure the buyer would be better off financially--to counter a trend which could have made us appear to be on the defensive.

If your competition is cheaper, state how your service is more thorough and gives superior results. If they are faster, state how much more service you offer. Use what you believe in about your service, and make your competition defend themselves against your criteria.

The Advertising Stage

Now we are ready to spend those budget dollars. The advertising stage is where you decide what media will be best--both to reach your markets

successfully and to stretch your available dollars. Briefly, advertising media can be listed in order of most expensive first: television commercials, radio spots, billboards, printed display advertising (newspapers, magazines), direct mail, bulk pamphlet delivery to individual-handout locations, and on-site handout materials.

Do not ever be without the last media. On-site handout materials are the least expensive advertising materials and a very effective way to advertise. You are in touch with people who were interested enough to be at your location. Give them two copies--one to pass along to friends.

If you have not already, develop at least one central printed piece of literature for yourselves--such as a pamphlet. If you have the funds, go to a small advertising agency which will write, design and have printed the number of copies you need. If you do not have money for the price they quote you, writing the copy yourselves will save those extra dollars. Be sure to describe your history, what your services are, and who they should contact for more information. Do not include prices or schedules, because these may change before you run out of copies. The main thing is to have the design and printing done very well. Everyone you want to contact is accustomed to beautifully executed printing--most of the junk mail now is superb! The best quality at a reasonable price is available to you at a medium-size printer who also has a typesetting department. They will work within the budget figure you give them, but plan to spend at least \$.25 each in the 2-3,000 copies quantity.

This piece of literature is multi-purpose, for it can be used in direct mail campaigns as well as for handouts. Whether you are a funded or a fee-based organization, direct mail should be one of your advertising choices. Company managers

indicate that direct mail advertising provides their purchasing initiative. Individuals receiving direct mail with an easy response form are more apt to at least inquire about you than if they see a telephone number in a short TV ad.

Direct mail, however, comes in "campaigns," not as a one-shot effort. Plan to use your mailing list at least three times within a four-month period for the optimum results, with a different letter but same theme each time. Always include some kind of return mail response card. While mailing lists are available for purchase, you probably are better off developing your own list; you can be more specific.

If you are a fee-based organization, begin to save your pennies for display advertising. Your least expensive display would be in your local newspaper or community ad booklets for special events. For magazine, billboard, radio and TV display ads, you will need an advertising agency's services. As a fee-based service, you are as much a consumer-oriented group as your local hospital or community college. Find out how they advertise in your area. Sometimes the public relations manager of these institutions can give you extra help if you ask.

For the advertising stage of marketing, however, there is one overpowering concern no matter what media you choose: how you say your message. If you do not describe your services so they are understood, you will have only a small result per dollar spent. Frankly, when I came into your field, it took me nearly a year to understand the vocabulary you use. I read all sorts of advertising literature, newsletters and magazines--only to find 40,000 acronyms, shortened words and initials used in place of real words. The computer industry has nothing over on you!

You should not use your field vocabulary when you are advertising. You must speak the language of the markets you are trying to attract. Most do not know what you are selling

for "voc rehab, EMR, work hardening, extended shelter employment." Instead of using your usual terminology and trying to define it, state your services in terms of and on the level of newspapers (or what your 13-year-old brother's friends would understand).

You will find this very difficult to do, because "voc rehab" means voc rehab or vocational rehabilitation to you--not "we assist handicapped people to discover potential jobs they can hold." Even when you are advertising to people who should know your field--such as state vocational counselors--you will have more impact using every-day terminology.

I should add that you are not alone in this vocabulary problem. Every occupational field has its shorthand that means little or nothing to the outside world. That is why there is an advertising field--to interpret what the in-groups want to say to outsiders so products and services can be sold. If you do not have the budget for an interpreter, practice experimenting with words to come up with understandable messages for your different markets.

My company recently went through this very routine. In speaking with community colleges about our evaluation system designed for use by the general public, we said we measured aptitudes. The messages we got in response were very negative--to the effect that aptitude tests are no good. We had been having trouble with the term "aptitude" anyway in the voc rehab field, because we measure and use aptitudes quite differently than other voc rehab methods. So we decided now was the time to clear away this confusion altogether.

We decided to return to the exact phraseology of the science our systems are based on: human factor testing. We provide a human factor profile of an individual and link that profile directly to the DOT's Data-People-Things codes for potential vocations. May I say we now have a winner. The general public which

was turned off by a single word now listens and agrees with the principles of your methods. This is the kind of vocabulary discovery routine you are going to find rewarding.

Sales Followup

We are closing in, now, on the final step in marketing. Closing is the exact term to use. Nothing is sold until "the sale is closed"--until you have their promise or the money for your services. You can market and advertise and express yourself well until you are blue in the face, but you will not have positive results without sales followup.

The routine is very simple: (1) keep files of the advertising you send to every person, (2) talk (by phone or personally) to everyone who responds to your advertising, (3) talk again and again until the sale is made, and (4) advertise later to people who haven't yet responded.

I already know your reaction. "But I am not a salesperson! I do not know how to talk people into buying!" well, in just a few moments, I am going to convince you otherwise.

First, the traditional sales approach is no longer effective. You will not be able to push someone to buy your service in the manner you imagine sales is done. Think about it for a moment. Chances are that you buy only from people who can help you out with their product or service. Chances are that you avoid the kind of sales approach that sounds like a pitch. Most people today buy only when they believe their life will be better off because of the purchase. You are already selling all day long. Your job is helping clients. You establish a rapport with them, find out their needs, and then convince them that your service is making their lives better. Use this same approach in sales followup. Establish a rapport by discussing the buyer's needs, talk about how you can help them by using your services,

convince them from examples of how you have helped others in their position.

Let us take a really tough example: getting a larger caseload from a DVR counselor. Assume you have laid all the groundwork I have talked about so far. Follow up by calling the counselor--just to find out what he/she feels about the evaluations you have been sending. Are they what is wanted? Are your reports easy to understand? What could you do to help out more? What are his/her problems? From the conversation, you may find making a slight adjustment will give you more cases, or you may be able to clarify something in his/her mind. But offering to help today, and when you call again later--and again later on--will convince the counselor that he/she's going to be better off sending you more cases. This is sales followup.

Market Research

I would be remiss in closing without mentioning there is a very technical area to marketing called market research. To be truthful about marketing--or building engineers--technical expertise in complex relationships is the difference between that and selling--or a janitor's position. My marketing research, however, indicated you needed more emphasis on the practical aspects of marketing today.

If you have funds to work with, you would profit by a marketing expert's survey and report on your organization's present and future position in the community. It probably would not be fruitful for you to try this yourselves. There are some general trends in marketing vocational evaluation, however, you should be aware of.

The world economy has forced the U.S. into a different role in industrial growth and productivity rates. We no longer dominate the world's economy and are losing our former industrial leadership. This means we will be undergoing significant

changes in occupational fields as we are forced to move into new enterprises, and an entirely new dimension will be given to the term "vocational rehabilitation."

Since 85-90% of the U.S. economy's product is paid out in the form of wages, more governmental attention and resources will be afforded to displaced workers, to get them back into income-producing, taxpaying situations, than will be given to persons who are not able-bodied. Therefore, services to the handicapped in vocational rehabilitation will have to be funded more from private sources than government.

Vocational evaluators will be trained to serve the general public, for present placement or personnel services do not have the expertise to reliably advise changing careers. Due to the mass of people involved in a career predicament, the professional will be given less time per client with additional demands for greater reliability in satisfactory job prediction.

You must stay aware of the changes around you and be prepared to alter your marketing emphasis to satisfy new needs. There is a great future in vocational evaluation, but beware of how to appeal to your emerging markets! You may find new markets do not want to be "evaluated." Perhaps you will become "vocational match-makers" instead!

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