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ABSTRACT

This guide, which is intended for project directors, coordinators, and other professional staff interested in marketing adult basic skills and workplace education programs to business, presents a six-step process for developing a marketing plan. Discussed first are the purposes of marketing and considerations in marketing workplace education to business. The remainder of the guide details the following steps in the process of developing a marketing plan: defining what is being marketed; delineating the marketing campaign's audience; discovering a marketing niche; choosing appropriate personal and/or impersonal marketing techniques; developing and implementing an action plan; and evaluating the marketing campaign's progress. Numerous sample materials to be developed at each stage of the plan development process are provided along with a list of seven resources. (MN)

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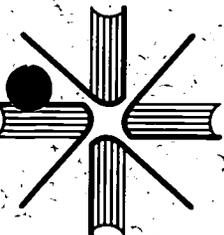
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# Marketing Workplace Education to Business



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# **Marketing Workplace Education to Business**

**1995**

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## **Marketing to Business**

As an educator in adult basic skills, you are in a natural position to market your expertise to employers. Employers are in need of an educator who can advise them about how workplace education programs can address their employees' basic skills needs that can underlie many other company problems.

Workplace education programs can be viewed as an opportunity to add another "product offering" to an adult educator's set of skills. In light of shrinking federal funds and lack of state support, workplace education can be the means in meeting student needs while building revenues to support ongoing adult education efforts.

This guide will provide project directors, coordinators, and professional staff a brief overview of the steps involved in developing a marketing plan. It will also provide some specific ideas and/or techniques that you might adopt for your program. There are several resources available that can supplement this guide with an in depth look at the "how to's" of marketing. Some references are listed in the back of this guide.

### **What Does Marketing Mean?**

The most common purpose of marketing is to impart information about a service, product or idea in order that people may identify, seek or support these offerings. Marketing helps people to identify what an organization, company or person does. It assists people in seeking specific services or products. Marketing also imparts information to potential supporters of a cause, idea or program.

Marketing in itself is not selling, although sales may be a result of marketing. To illustrate this difference, take a moment to think of a television commercial promoting a new movie. The commercial provides you information about the movie, however, it does not necessarily ensure you will purchase a ticket at the box office. Another illustration of marketing which might not be as obvious might have occurred at the last conference you attended. The keynote speakers not only provided interesting speeches but because of their presence at the conference they were asked to speak again. Additionally, the organization that they represent received support from participants. Both illustrate a strategic technique as they target the most likely supporters: the commercial targets potential viewers and the keynote speakers target conference participants.

Most people are familiar with marketing techniques whether on a conscious or subconscious level due to their day to day experiences. Some of the most obvious techniques are used in advertising campaigns that probably cost more than the entire budget of most adult education programs. It is important to note that marketing does not need to drain your budget. It is possible to have an effective marketing plan that fits your fiscal, time, and energy capabilities.

### **Why Market Workplace Education to Business?**

There are two compelling reasons for an adult education program to consider working with employers to start workplace education programs.

- 1) The first reason stems from an adult education program's finances: traditional funding sources are shrinking requiring program directors to look for alternative sources of income.
- 2) The second reason is the realization that employers are experiencing complex problems as a direct result of the low skill levels of their employees.

Employers, whether a firm in private industry or a governmental agency, cannot compete and/or operate effectively when basic skills problems hamper productivity. For example some employers are unaware that the lack of basic skills can be at the root of job related problems, such as poor quality. Moreover, even if they do recognize these basic skills problems, many times they don't know how to solve them or who to call for assistance. Marketing workplace education programs will provide the information to help overcome the barriers employers face in seeking and obtaining assistance.

## How Do You Develop a Marketing Plan?

The basic steps involved in developing a marketing plan involve:

- 1) Defining *what* you are marketing
- 2) Delineating *to whom* you are marketing
- 3) Discovering your *niche*
- 4) Choosing the *marketing techniques* based upon your capabilities
- 5) Developing and implementing an *action plan*
- 6) *Evaluating* your progress

Each of these steps will be described in further detail throughout this section.

### Step One: What are you marketing?

#### Assess Your Skills and Resources:

In preparing to market your workplace education program, the first essential step is to assess the skills and resources you bring to a workplace education partnership. This assessment will help you form a descriptive statement of your services to assist you in communicating with businesses.

Use the following format to brainstorm a list of your marketable skills and resources. Cluster like items together and then prioritize the list from the most important point to the least important point. A sample is provided on the next page.

#### Marketable Skills/Resources for Workplace Education Programs

Skill = proficiency, ability, expertise

Resource = an available supply that can be drawn upon; someone who can be turned to for support or help

\*

\*

\*

\*

\*

What skills and resources did you list? Here is an example if you are having difficulty in completing the task.

**Marketable Skills/Resources for Workplace Education Programs**

Skills = proficiency, ability, expertise

Resource = an available supply that can be drawn upon; someone who can be turned to for support or help

\* **Adult Education**

Adult basic skills and life skills education expertise; English as a Second Language, experience in and knowledge of adult learners, instruction of adults, competency-based education

\* **Assessment**

Conduct needs assessments, program evaluations, learner progress

\* **Design and Instruction**

Conduct skills task analysis, design and deliver functional context curriculum

\* **Resources**

Resources and materials in the most current workplace education practices, \_\_# of years in teaching and providing services to adult learners

\* **Human Relations**

Understand self-esteem and self-confidence issues, group dynamics, cultural and diversity experience

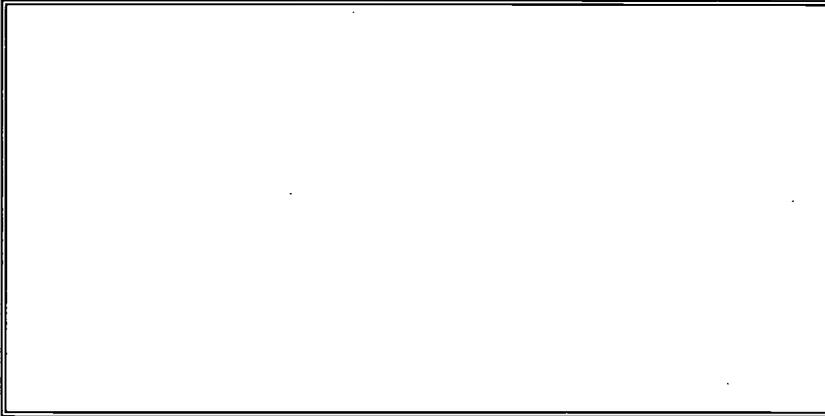
\* **Effectiveness**

Ability to operate in a cost effective, flexible and adaptable manner; Availability of information regarding student success (e.g. # of students that completed certificates GED, grade or skill levels, etc.)

Using this list of skills and resources, a clear image of what you bring as a workplace education provider should emerge. From this image, a statement identifying the services you provide can then be developed. This statement should make a company seek your services. To assist you in developing a statement of what your program provides to business, complete the next exercise.

**Design an Advertisement:**

Imagine for a moment that you are going to place an advertisement on a bus stop bench. Think about the skills, resources, and services you could provide to businesses. What would you say in your advertisement to communicate these offerings to the public? Use the space below to design your bench ad.

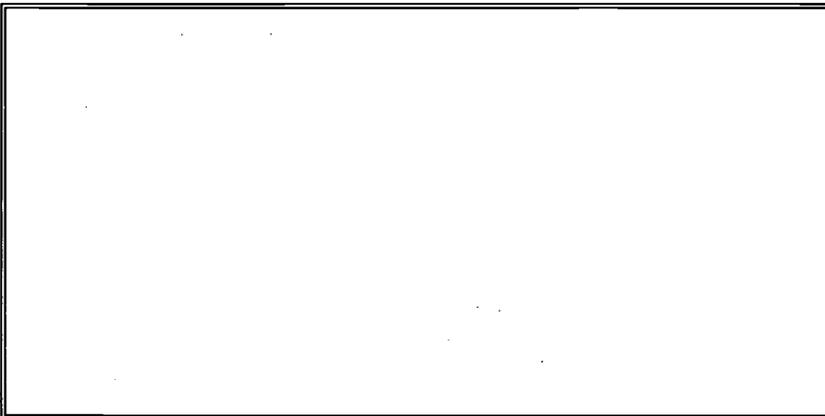


When you are finished, ask yourself the following questions to critique your ad.

1. Does it clearly convey your services?
2. Does the ad focus on you, or does it address potential business clients?
3. Was it difficult to communicate your services in this advertisement?

Using the same questions, let someone else critique your ad.

Based on the responses to these questions, would you like to change your ad? If so, use the box below to make these changes.



Once you have moved through the other steps listed in this guide, you may find that you will want to change your advertisement again. At this point this exercise is only meant to facilitate the identification of your services and assist you in the next step of identifying your customer.

### Step Two: To whom are you marketing?

To develop a strategic marketing plan, a target audience should be identified. This identification process not only ensures your message will reach the businesses you want to reach, but will also allow you to see the most return for the money, time and energy spent on your marketing effort. For example, the movie commercial mentioned earlier is a strategic marketing technique used to reach potential viewers. The commercial targets a population that will most likely purchase tickets to see that particular show. How do the marketing executives decide who to target? They do extensive research including pilot screenings to test several populations.

Of course this extensive process is not feasible for adult education programs on a lean budget. However, if the basic principles of this research are used, most adult education programs will find the process helpful and cost effective. The basic principle of market research is to start with what you already know. The marketing executives know certain facts about their movie. For instance, they probably know what age groups will be attracted to the box office based upon the movie's content. The same applies for adult education programs. Each has a specific offering(s), for example, ESL, GED or basic skills programs. Each of these programs has a natural, specific audience or population to be targeted.

This basic principle in identifying your customer follows Step One in that skills, resources, services and specialties have been defined. The purpose of Step Two is to further delineate specific companies in your program's area that might benefit from a partnership with your program. The more you understand your potential clients the greater the likelihood of developing partnerships with them.

Answer the following questions based upon your program and community.

1. What are you marketing? (Defined in Step One)
2. Who do you currently serve? (e.g. home makers, unemployed individuals, hospital workers and assemblers, etc.)
3. What obstacles impede student participation in your program? (e.g. difficult work schedules or family issues)
4. What are obstacles in implementing your adult education program? (e.g. transient populations or student retention)
5. Is there a larger potential student population at the business or in the industry (e.g. health care, manufacturing, etc.) where some of your students work?
6. Are the businesses aware of this population's needs?
7. Is there a fit between your services and the businesses' needs?

After identifying specific businesses or industries to target, it is important to find out more information about those companies that will assist in the development of your marketing plan. Answering the following questions will provide insight into the businesses you have identified and the strategies to use in approaching individual organizations:

1. What is the company's organizational culture? (e.g. Does the employer value education? Does the company provide tuition assistance programs? Is it a learning organization? What is their *mission*?)
2. How many employees might take advantage of your services?
3. What is the current training structure?
4. Does the company contract for training services from outside providers?
5. What is the financial status of the company?
6. What changes face the company?
7. Who is a contact person and/or decision maker within the company?
8. What potential problems might the company be facing now or in the future?
9. Other...

Steps One and Two are important in that they provide you with some of the background information you will need to keep in mind while implementing the remainder of the steps.

### Step Three: What is your niche?

This step is fairly simple in marketing workplace education to business because workplace education is still a relatively new field. Your niche is based upon the information you identified in Step One, that is your skills, resources and expertise in workplace education. For further information on the characteristics of workplace education, and a comparison of workplace education programs to other training programs offered by business and contract training organizations, see the first pamphlet in this series titled, "What is Workplace Education?"

### Step Four: What marketing techniques should you use?

Now that you know what you are marketing, to whom you are marketing, and what your niche is, you will be able to decide how to effectively communicate this information to the businesses you have targeted. The following marketing techniques and descriptions are taken from, or are based upon David Karlson's (1988) book, Marketing Your Consulting or Professional Services, pp.37-78. This section of the guide will provide you with marketing ideas to pursue. Please refer to the resources listed in the back of this guide for an in-depth understanding of these techniques.

There are generally two types of marketing techniques, personal and impersonal. Personal marketing techniques involve direct personal contact with your targeted populations while impersonal marketing techniques don't. The chart below provides several examples of each. An explanation of each technique will follow the chart. As you review these techniques, please keep in mind your fiscal, time and energy capabilities. You may recognize that you are already using many of these techniques. Therefore, it may only be a question of highlighting workplace education in the techniques you are presently using. For instance, if you currently submit articles about your program to various adult education newsletters, you could submit these articles to business and training newsletters as well.

As you review the following marketing techniques it will be helpful to review your abilities and capabilities. You will probably find that you are drawn to or prefer one technique over another. Answering the following questions can facilitate the process of selecting marketing techniques that are appropriate and comfortable for your program.

- How much money, time and energy can be expended in a marketing effort?
- What skills do you and your staff bring to the marketing effort? (e.g. public speaking, graphic design, training experience, networking, writing skills, etc.)
- What marketing techniques draw on these skills?
- What size businesses make up your target population? (Note: personal marketing techniques generally reach fewer people than impersonal marketing techniques.)
- What marketing techniques are in effect now? Can these techniques be combined with another? Does workplace education need to be added to these techniques?
- What is your marketing goal? Do you want workplace education partnerships in 1-5 or 10-20 businesses?

The remainder of this section, Step Four, is an outline including descriptions of personal and impersonal marketing techniques. Each description will provide a brief technique summary that includes or is followed by an idea as to how each technique can be implemented by an adult education program. A strong, effective marketing plan usually includes a combination of both personal and impersonal techniques.

**Summary list of marketing techniques:**

<b>Personal Marketing Techniques:</b>	<b>Impersonal Marketing Techniques:</b>
Seminars/Workshops	Newsletters
Telemarketing	Publications
Telemarketing/Direct Mail	*    Feature Articles
Lecture/Speeches	*    Book or Monograph
Pre-proposals	*    Letters to Editor
Personal Selling	*    Book Reviews
Professional Organizations	Directories
*    Networking with competition	*    Yellow Pages
Referrals/Referral Fees	*    Databases
Conference Presentations	Capability Brochure
*    Symposia	Media Publicity
*    Convention Presentations	*    Press Releases
*    Trade Show Exhibits	*    Media Appearances
*    Convention Displays	*    Public Relations
	Direct Mail

**Personal Marketing Techniques:**

***Seminars/Workshops:***

This is a technique with which most adult educators are familiar, and at which they are adept. Adult educators frequently provide workshops to share information and further their professional development. These workshops can also be very effective in marketing workplace education to business. An inexpensive way of implementing this technique is to write a presentation proposal to area professional or training organizations that hold regularly scheduled events. For example, an informational presentation which highlights the warning signs of a basic skills problem in the workplace will provide interesting information. Additionally it will emphasize your role as an expert who business people can call with individual needs or requests. To identify organizations in your area look under "Professional Organizations" in your telephone directory, and/or ask friends and business associates.

## ***Marketing Workplace Education to Business***

### ***Telemarketing:***

Telemarketing involves phoning potential customers in order to generate interest in your services. Once you have established that an employer is a good prospect and know the name of the decision-maker for training, you are ready to make the call. The objective of the call is to establish a level of trust and get an appointment. This is not the time to talk about the history of your program or get commitment for a workplace education program. This is a time to secure an appointment using the descriptive statement that you developed in Step One. Respect the employer's time by keeping your conversations focused and brief.

### ***Telemarketing and Direct Mailing:***

Direct mail in combination with telemarketing has proven to be a very effective technique for establishing initial contact with potential customers. Direct mail involves mailing brochures and letters to your targeted population. After mailing information to potential customers, a phone contact is made to follow up. This can be effective because potential customers have a point of reference when the phone contact is made; therefore, they may set an appointment more readily.

Adult educators might find that their advisory board members will provide many names of business people to contact. Telemarketing and direct mailing techniques are very effective when combined with this type of a referral. Potential customers are usually more receptive and accommodating to referral calls as a courtesy to the person who referred you.

### ***Lectures and Speeches:***

Lectures and speeches are similar to workshops and seminars in that they allow you to market workplace education programs while providing useful information to your target population. They allow you to emphasize your role as an expert who business people can call with individual needs or requests.

Karlson suggests in his book that you register with speakers bureaus, professional organizations, chambers of commerce, and colleges. Additionally you can directly contact organizations whose members fit the profile of the businesses or industries you are targeting.

### ***Preliminary Proposals:***

Developing a preliminary proposal to use when meeting with potential customers allows you to lay out the basic components of a workplace education program to serve as a reference point for the potential customer. This preliminary proposal is used to solidify the concepts of workplace education for the potential customer and serve as a starting block on which to develop a customized proposal that meets the specific needs of the company.

A workplace education preliminary proposal should include:

- 1) Background information on the indicators, or early warning signs, of potential basic skills problems that employers notice in their organizations.
- 2) Descriptions of partnership models that address the different levels of service that can be provided. (e.g. customized service models, modified service models and standard service models)
- 3) General costs of these different service levels.

### ***Personal Selling:***

After attracting potential customers, personal selling must take place. A key to selling workplace education to business is to remember you are selling an intangible concept. Conceptual selling is unique in its approach because it requires the service provider to fully understand the needs of the customer. This allows service providers to "fit" the services to the customer's needs. If the concepts and the needs don't "fit", it is not to the advantage of the service provider or the customer to contract for services.

Adult educators already have the basic skills needed to do conceptual selling successfully. Adult educators are accustomed to responding to students' needs by developing and implementing individual learning plans. In a sense, conceptual selling follows the same process, the needs of the client are the focus in both cases.

***Professional Organizations:***

We have looked at using professional organizations in providing workshops and speeches without addressing the obvious benefit of becoming a member of these organizations. They provide the opportunity for networking. As a member of business and training professional organizations, you will have an opportunity to meet potential customers and keep abreast of new developments that may impact your program. Another benefit of being a member is receiving or having access to a complete membership directory. Some professional organizations permit you to use that directory in your marketing efforts.

***Referrals and Referral Fees:***

Karlson describes this technique in his book: "A personal referral occurs when a potential client is recommended to you by a client, associate, or competitor. Encouraging referrals from clients, associates, and others is an excellent way to gain new clients. Referrals can be secured by: 1) requesting and encouraging referrals verbally or in writing from current clients; 2) participating in a referral network with other professionals, and 3) soliciting referrals from other professionals who might be too busy to handle the type of clients you are interested in serving." (pp.54)

Referrals are based on win/win situations. If your program specializes in ESL and a business calls with a need in basic skills, referring that business to another program with a basic skills focus could establish a relationship and prove to be beneficial to both programs as each provides referrals to the other.

***Conference Presentations:***

Listed in this category are two more ways in which your program may participate in conferences. In marketing workplace education it is important to remember that this section refers to conferences which target business representatives or potential customers. This guide has already touched on symposia and presentations; however, other opportunities are possible at most conferences in trade show exhibits and convention displays. These displays increase your visibility, name recognition, and are reusable for other events.

**Impersonal Marketing Techniques**

***Newsletters:***

Informational newsletters assist in communicating with and educating select audiences. The most cost effective way to use this technique is to submit articles to existing publications of professional business and training organizations. A much more time consuming and expensive option is publishing a newsletter that deals with workplace education topics and mailing it to potential clients. Either option is an excellent way to catch the eye of prospective customers. Remember it is important to project a professional image in any published materials.

***Publications:***

For workplace education providers who are skilled in communicating through the written word, writing for journals, authoring a book or monograph, or submitting letters to the editor are also effective techniques that can provide information to be used repeatedly and in combination with other marketing techniques, such as in direct mailings. Additionally, these publications highlight your role as an expert in the field of workplace education.

### ***Directories and Databases:***

As mentioned previously in this guide, many professional organizations permit members to use membership directories for marketing purposes. Another obvious directory is the Yellow Pages. The key to purchasing advertising space in these directories is to highlight workplace education and keep your potential client in mind. To ensure that you reach businesses in these directories match your services with the appropriate section of the directory. For example, listing your workplace education services under "training providers" will reach business clientele. In creating your advertisement, you might use the ad you developed in the bus stop bench exercise as a reference.

Databases are available on many subjects. You are probably eligible to be listed on a database especially those that highlight training programs. To discover what databases are available to you, visit your local library to locate a database directory. This directory will provide the producer's name, subject matter, service available, updating schedules and other descriptive information about databases that match your services (e.g. training and adult education).

### ***Capability Brochure:***

A capability brochure conveys the ability of your workplace education program to produce results. It should be formatted and produced professionally to project the quality image of your program. It can be used in conjunction with some of the other techniques described in this guide. For example, a capability brochure is a reference piece to highlight in personal selling. It can also be included as a deliverable at conference displays, or mailed with a letter in your direct mailing efforts. Because it has many uses, a capability brochure is a cost-effective marketing technique.

### ***Media Publicity:***

There are many media publicity techniques that you can use in marketing. Using the media provides an interesting opportunity to reach a broad population while targeting a specific audience. For example, a story in your local newspaper about your workplace education program could be featured in the business or careers section. In doing so, your feature story will be seen by many readers and still target trainers and business people.

A key consideration in using the media to market your workplace education program is to always remember the confidential nature of workplace education partnerships. Business partners generally do not want to publicize the fact that they have a workplace basic skills program because of the stigma that admission carries. Always check with business partners before using their company name or divulging any sensitive information.

## *Marketing Workplace Education to Business*

### **Step Five: How do you develop and implement an action plan?**

- 1) The first part of this process is to set your goals for the next six months. These are the goals you want to achieve as a result of marketing. Be as specific as possible when forming these goals.

An example of a specific statement could be, "By June 15, 1995, secure three workplace education partnerships which are completely funded by the business partner." In this example the outcome is quantifiable: there will be three workplace education partnerships. In addition the goal is detailed: it identifies dates and funding information.

- 2) After determining the goals, you must decide what marketing techniques will be used to meet each one. This is the second part in developing an action plan. Using the goal statement above, service providers could decide to use the following marketing techniques based upon on their abilities and capabilities.

**Goal:** **By June 15, 1995, secure three workplace education partnerships which are completely funded by the business partner.**

**Marketing Techniques:**

- Capability brochure
- Workshops/seminars
- Telemarketing and direct mail
- Personal selling
- Preliminary proposal
- Networking via professional organizations

- 3) The third part to Step Five is to develop a working calendar. A working calendar facilitates the development and implementation of your marketing plan. It usually involves a time line which separates each marketing technique into basic steps. The following illustrates how this calendar might be formatted and used. This example is only one of many possible formats you could use.

Goal	Marketing Technique	Working Calendar	Date
I. By June 15, 1995, secure three workplace education partnerships which are completely funded by the business partner.	* Capability brochure	1. Research information for and develop draft of capability brochure.	1/15
		2. Talk to graphic designer to see if he/she will donate services.	1/15
		3. Secure services of graphic designer and meet with first draft.	1/20
		4. Review brochure layout, go to print.	1/25
		6. Distribute at Feb. ASTD meeting.	1/25
		7. Review progress.	2/15

The deadline dates can be changed and new approaches added. The working calendar is meant to facilitate you in launching, maintaining and measuring the success of your marketing efforts.

**Step Six    How do you evaluate progress?**

Your goals and working calendar will also serve you in evaluating your progress. Based upon your success in meeting the deadlines and using your measurable goals, the working calendar will not only reflect your efforts in marketing but also the effectiveness of this effort. For example, because your goal reflects and outcome that is quantifiable, you will know when you have reached your goal. However, if you find that you are not meeting the deadlines that you set for yourself, and feel uncomfortable with the steps necessary in attaining your goal, you might decide to evaluate your capabilities and abilities in using this technique. Your marketing efforts will be much more effective if you feel effective in using them.

This guide has focused on the six basic steps to marketing workplace education to business: 1) Defining *what* you are marketing, 2) Delineating *to whom* you are marketing, 3) Discovering your *niche*, 4) Choosing the *marketing techniques* based upon your capabilities, 5) Developing and implementing an *action plan*, 6) *Evaluating* your progress.

For more information and ideas about marketing workplace education programs to business, please refer to the references located in the back of this guide. As always, the Office of Adult Education will provide technical assistance or training to facilitate your workplace education marketing efforts.

For assistance contact:            Jennifer Burkhart  
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