
If You Build It, Will They Come?

How internal and external trainers successfully market their programs and services.

BY SAUL CARLINER, PH.D., CTD, AND DAVID W. PRICE

In the face of changing technologies, hyper-busy employees, and “do-it-yourself training,” how do Learning and Development (L&D) professionals successfully promote—or market—their programs, products, and services these days? Do they still publish catalogs and schedules? What role does social media play? How about personal contacts and relationships? This is an issue no one has studied in depth since the 1990s (a time before e-mail—imagine that!).

This *Training* magazine study, based on a survey of 149 respondents, tackles this issue, specifically exploring:

- Where marketing fits into the priorities of organizations
- The types of programs and services trainers need to promote
- The marketing resources available to trainers
- General approaches trainers take to market their sessions
- How and when trainers market their programs and services
- The print, online, and face-to-face approaches most commonly used in marketing
- The key marketing messages

This study also differentiates among the ways internal trainers

(those who work for a Training department inside an organization whose primary business is something other than training) and external trainers (those who work independently or for a service provider whose primary business is designing and developing programs, providing off-the-shelf-programs, and other services for training) market their programs. The sidebar, “About This Study,” below explains how we conducted this study and who participated in it.

Where Does Marketing Fit Among Priorities?

We wondered about the importance of marketing among the job priorities of trainers. We recognize that the priority is partly a function of job responsibilities, so we also asked about those.

Of the internal trainers responding, only 19% identified marketing as a primary job responsibility (that is, work on marketing directly affects evaluations of work performance). Another 46% identified marketing as a secondary job responsibility that may or may not affect evaluations of work performance, and 35% identified marketing as a tertiary job responsibility that does not contribute to performance evaluations. See Figure 1.

SURVEY METHODOLOGY

Participants from the *Training* magazine mailing list were asked to participate in the study. The survey was open for four weeks. Participants completed the survey anonymously online.

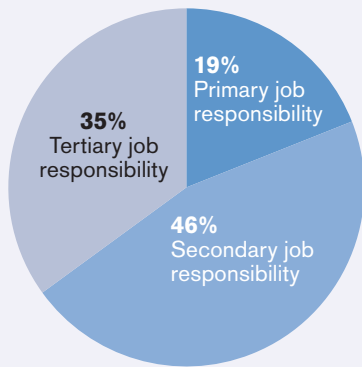
Some 149 respondents completed the survey. Of those:

- **110 were internal trainers.** Some 43% were identified as supervisors or managers; 23% as project managers (ones without people responsibilities); and 34% as individual contributors.
Organization size: Small (1-499 employees): (20.2%); Medium (500-4,999 employees): 46.8%; and Large (5,000-plus employees): 33%. Respondents represented 22 industries. The top four were government and military (14.7%), manufacturing (13.8%), finance and banking (11%), and health and medical services (10.1%). Some

89% of respondents were from the U.S.; 6.4% from Canada; and 4.5% from other countries.

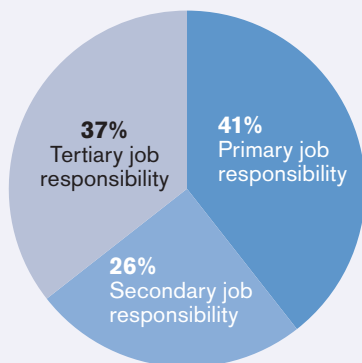
- **39 were external trainers.** Some 44% identified themselves as business owners; 21% as executives or managers with a services provider who have people responsibility; 10% as project managers; 18% as contractors who directly contract with clients; and another 5% as contractors who work through an agency. *Organization size:* Very small (fewer than 10 employees): 61.5%; Small (1-499 employees): 89.5%; Medium (500-4,999 employees): 11.5%. Respondents were primarily from the professional services (38.5%) and business services (28.2%) industries. Some 71.6% of respondents were from the U.S.; 15.5% from Canada; and 12.9% from other countries.

Figure 1: Marketing as a Job Responsibility for Internal Trainers



Among the external trainers who participated in the study, 41% identified marketing as a primary job responsibility (that is, consuming 50% or more of their time). Another 26% identified marketing as a secondary job responsibility, which consumes 21 to 49% of their time; and 37% identified marketing as a tertiary job responsibility, which consumes 20% or less of their time. See Figure 2.

Figure 2: Marketing as a Job Responsibility for External Trainers



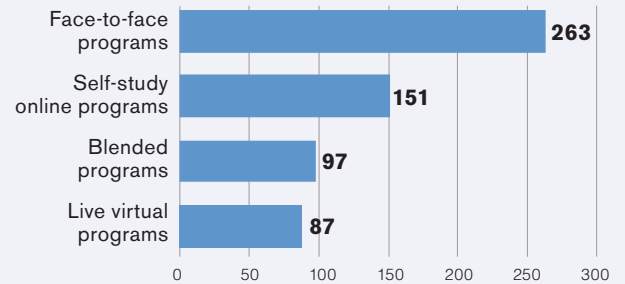
The data suggests that marketing is a much stronger priority for external trainers than internal trainers. However, for a little more than a third of both internal and external trainers, marketing is a tertiary job responsibility.

Programs and Services Trainers Need to Promote

For internal trainers, the most common types of programs requiring promotion are (in ranked order in terms of the amount of time invested in them by staff of the departments in which participants work; see Figure 3):

1. Face-to-face programs
2. Blended programs
3. Self-study online programs
4. Live virtual programs

Figure 3: Weighted Ranking of Programs Offered for Enrollment by Internal Trainers

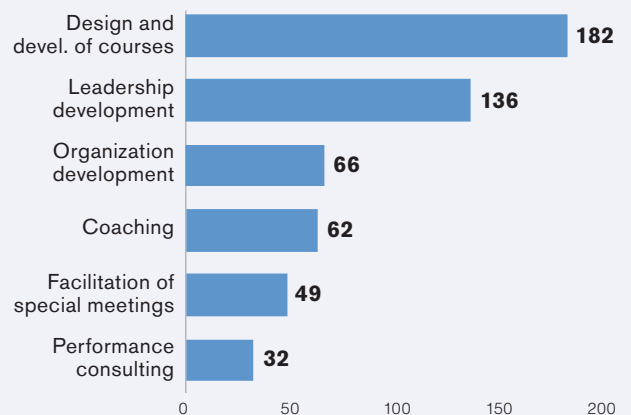


Although many of these programs are developed internally, 55% of internal trainers offer programs custom developed by another firm or by contractors who report to another firm. In addition, 64% offer third-party courses that were developed and taught by another organization and might have been customized.

Internal trainers also need to promote the variety of services they offer. The most common are (in ranked order in terms of the amount of time invested in them by staff of the departments in which participants work; see Figure 4):

1. Design and development of courses
2. Leadership development
3. Organization development

Figure 4: Weighted Ranking of Services Offered by Internal Trainers

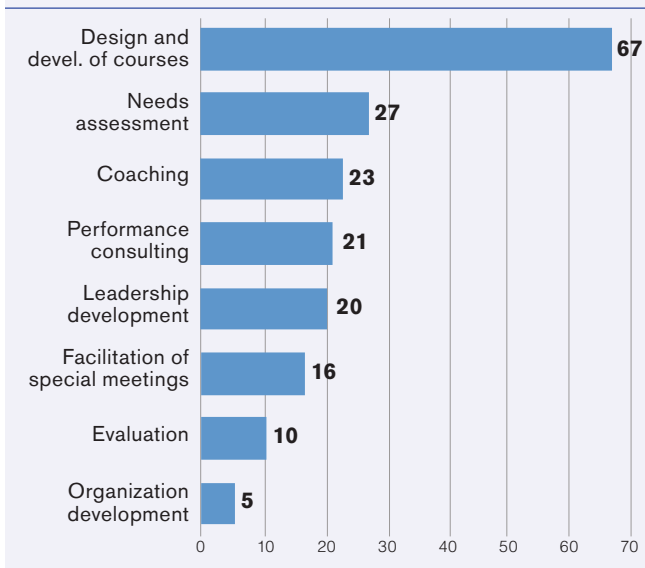


Among external trainers, more than 90% develop custom courses. For 56% of external trainers, face-to-face courses generate the most income, followed by self-study online courses (19%) and blended courses (17%), and 8% for other.

In addition, 74% of external trainers offer off-the-shelf courses. The most common of these are face-to-face programs (72% of those offering courses), with nearly equal percentages of external trainers offering self-study online, blended, and live virtual courses (44%, 44%, and 41%, respectively).

In addition, 90% of external trainers also offer services. The most common is design and development of courses.

Figure 5: Weighted Ranking of Services Offered by External Trainers



Note that leadership development and organization development are ranked low among the services offered by external trainers but are two of the top three services offered by internal trainers. See Figure 5.

Marketing Resources Available to Trainers

To market these programs and services, trainers need resources. Differences in resources available for marketing exist between internal and external training groups.

The overwhelming majority of internal trainers—93%—receive their funding by apportionment, a budget allocation to their groups. Some 38.5% of internal groups spend none of their budget on marketing, and another 43.1% spend between 1% and 5%. In dollars, nearly two-thirds of participants (65.1%) spend \$1,000 or less promoting their programs and services (see Tables 1 and 2).

Table 1: Percentage of Total Budget Spent on Marketing Programs and Services

Percentage of Total Budget	Internal Training	External Training
0%	38.5%	23.1%
1%-5%	43.1%	43.6%
6%-10%	10.1%	12.8%
11%-15%	3.7%	5.1%
16%-20%	0.9%	2.6%
21%-25%	1.8%	0%
25%+	1.8%	12.8%

Table 2: Annual Spending on Marketing of Programs and Services (including salaries of marketing staff)

Actual spending	Internal Training	External Training
\$1,000 or less	65.1%	28.2%
\$1,001-\$2,500	5.5%	10.3%
\$2,501-\$5,000	4.6%	7.7%
\$5,001-\$10,000	8.3%	7.7%
\$10,001-\$25,000	5.5%	7.7%
\$25,001-\$50,000	2.7%	12.8%
\$50,001-\$100,000	5.5%	12.8%
\$100,001-\$250,000	.9%	5.1%
\$250,001-\$500,000	1.8%	0%
\$500,001-\$1 million	0%	7.7%
\$1 million+	0%	0%

For external trainers, the certainty of a fixed price is the most popular payment arrangement (the primary arrangement for 43.6% of participants). The second most popular payment arrangement is one negotiated uniquely with the client (the primary arrangement for 30.8%). See Table 3.

Table 3: How External Training Groups Generate Revenue

Type of Payment	Percentage of External Groups Primarily Paid this Way
Flat price—negotiate a flat rate with clients before agreeing to services	43.6%
Negotiate a different arrangement with each customer	30.8%
Time and materials with limits—clients pay for time used, plus materials costs (such as travel) but with a not-to-exceed price negotiated in advance	12.8%
Sticker price—on each product	7.7%
Time and materials without limits—clients pay for time used, plus materials costs (such as travel); no limit on expenses is negotiated in advance	5.1%

Only one-third (33%) of external training groups have one or more dedicated marketing representatives on staff (people whose primary job responsibility is selling the products and services offered by the organization).

Furthermore, external trainers also face solid limits on resources for marketing. Although some marketing experts suggest spending 20% of budgets on marketing, only approximately one-sixth of groups meet that threshold. In terms of actual spending, nearly half (46.7%) spend \$5,000 or less on marketing. To put this into perspective, that’s the price of one full-page advertisement in a trade magazine or having a small booth at one business show (including travel costs).

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Promoting Upcoming Live and Live Virtual Programs

One of the most vexing marketing challenges for Training professionals is the timing of marketing messages for upcoming programs.

In terms of when to begin promoting a particular program, internal trainers typically start either two to four weeks before the course is scheduled (24.8% of participants) or six to eight weeks before a course is scheduled (21.1%). By contrast, external trainers begin much sooner, with 25% starting more than 12 weeks before the course is scheduled and another 25% starting eight to 10 weeks in advance. See Table 4.

Table 4: When Trainers First Start Promoting an Upcoming Class

Time frame	Internal Trainers	External Trainers
More than 12 weeks before the course is scheduled	10.1%	25.0%
10-12 weeks before the course is scheduled	9.2%	12.5%
8-10 weeks before the course is scheduled	6.4%	25.0%
6-8 weeks before the course is scheduled	21.1%	12.5%
4-6 weeks before the course is scheduled	17.4%	12.5%
2-4 weeks before the course is scheduled	24.8%	12.5%
2 weeks before the course is scheduled	7.3%	0%
1 week before the course is scheduled	0.9%	0%
Less than 1 week before the course is scheduled	2.7%	0%

The majority of internal and external trainers use the same schedule to promote face-to-face and live virtual events (76.1% internal, 75% external).

In terms of the frequency of reminders, slightly more than half of internal trainers send them less frequently than every other week (50.5%), but another 27.5% send them weekly. Slightly more than one-third of internal trainers (37.5%) send reminders less frequently than every other week, while others send them either weekly or every other week (25%). See Table 5.

Table 5: When Trainers Send Reminders About an Upcoming Class

Time frame	Internal Trainers	External Trainers
Daily	0.9%	0%
2-3 times per week	6.4%	12.5%
Weekly	27.5%	25.0%
Every other week	14.7%	25.0%
Less frequently than every other week	50.5%	37.5%

Most internal (56%) and even more external (62.5%) trainers send reminders more frequently as the date of the program gets closer.

Enrollments in internal courses tend to peak within four weeks of the start of a course. By contrast, half of the external trainers say their enrollments peak six to 12 weeks before a course, and the other half report that their enrollments peak four weeks or sooner before the event. See Table 6.

Table 6: When Enrollments Peak for an Upcoming Class

Time frame	Internal Trainers	External Trainers
0-12 weeks before the course is scheduled	2.8%	12.5%
8-10 weeks before the course is scheduled	3.7%	25.0%
6-8 weeks before the course is scheduled	5.5%	12.5%
4-6 weeks before the course is scheduled	14.7%	0%
2-4 weeks before the course is scheduled	30.3%	0%
1-2 weeks before the course is scheduled	28.4%	25.0%
During the week before the program is scheduled	14.7%	25.0%

Promoting Self-Study Programs

Because learners can take them at any time, self-study programs (which comprise a significant part of the overall training portfolio), require ongoing promotion. In general, internal trainers tend to promote these courses more frequently than their external colleagues do, with 39.5% of internal trainers promoting self-study programs once per quarter and another 24.8% promoting the programs once a month. By contrast, 66.7% of external trainers only promote programs once a quarter and the remaining once per week. See Table 7.

Table 7: Frequency of Promoting Self-Study Programs

Time frame	Internal Trainers	External Trainers
Once per quarter	39.5%	66.7%
Once a month	24.8%	0%
Bi-weekly	3.7%	0%
Weekly	1.9%	33.3%
2-4 times per week	0.9%	0%
Daily	3.7%	0%
Other	25.7%	0%



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Promoting Services

In addition to training programs, many internal and external training groups offer services. Of those who promote them (for example, just 32.1% of internal trainers separately promote services), internal and external trainers tend to promote services less frequently than individual programs. The majority of internal trainers promote services either once or twice per year (31.4%) or once per quarter (37.1%).

External trainers promote services more frequently than that, with 31.4% promoting once per quarter and another 20% once per month. See Table 8.

Table 8: Frequency of Promoting Design, Development, Consulting, and Similar Services

Time frame	Internal Trainers	External Trainers
Once or twice per year	31.4%	0%
Once per quarter	37.1%	31.4%
Once a month	17.1%	20.0%
Bi-weekly	2.9%	8.6%
Weekly	11.4%	17.1%
2-4 times per week	0%	2.9%
Daily	0%	0%
Other	0%	20.0%

Marketing Vehicles

In addition to *when* to promote programs, the issue of *how* to promote them arises. That question typically raises the question of media: Should promotion occur online, in print, or person-to-person? All three play a role in marketing training programs and services.

Online media plays the primary role in marketing among both internal and external Training groups. Nearly everyone uses it: 91% of all internal groups and 97% of external ones.

The types of online vehicles internal trainers use most widely and find most effective (in order) are: e-mail messages promoting individual programs; schedules of upcoming programs; e-mail addresses for incoming inquiries; and catalogs of products, programs, and services.

Among external groups, the types of online vehicles used most widely (in order) include: Websites describing general capabilities of the organization; Web pages describing particular capabilities of the Training group; and a LinkedIn profile.

In terms of effectiveness, however, the most effective online vehicles for external trainers are related to e-mail messages, including messages promoting the general capabilities of the Training group and individual programs and services; e-mail services such as Mailchimp; and e-mail addresses for incoming inquiries. See Table 9.

Table 9: Use and Effectiveness of Online Marketing Materials

Type	% of Internal Groups Using This Vehicle	% of Internal Groups that Find It Effective	% of External Groups Using This Vehicle	% of External Groups that Find It Effective
Blog	11	50	61	83
Catalog of products, programs, services	56	72	61	70
Customer testimonials	N/A	N/A	71	85
E-mail address for incoming inquiries	74	79	66	84
E-mail messages promoting general capabilities of the Training group	56	76	58	82
E-mail messages promoting individual programs	94	90	61	91
E-mail messages promoting specific services	54	85	63	96
E-mail service such as Mailchimp	17	75	47	94
External social media such as Facebook and LinkedIn	18	67	N/A	N/A
Facebook page	N/A	N/A	63	46
LinkedIn profile	N/A	N/A	82	74
Twitter	N/A	N/A	58	50
Internal social media (i.e., Yammer)	31	60	N/A	N/A
Online portfolio of past projects	18	59	53	65
Schedule of upcoming programs	84	90	47	72
Web pages describing particular capabilities of the Training group	58	67	89	88
Website describing general capabilities of the organization	70	75	100	89
White papers about products/services	N/A	N/A	47	89

Even in the online age, print media continues to play a key role in marketing. Some 55% of internal Training groups use it, while 72% of external groups do.

The types of printed vehicles internal trainers use most widely and find most effective (in order) are: flyers about individual programs and services; schedules of upcoming programs; and brochures that focus on the general offerings of the Training and Development group.

Among external groups, the types of printed vehicles used most widely (in order) include: brochures that focus on the general offerings of the Training and Development group, flyers about individual programs and services; schedules of upcoming programs; and catalogs of upcoming programs and services. See Table 10.

Table 10: Use and Effectiveness of Printed Marketing Materials

Type	% of Internal Groups Using This Vehicle	% of Internal Groups that Find It Effective	% of External Groups Using This Vehicle	% of External Groups that Find It Effective
Annual report	32	74	15	50
Brochure that focuses on the general offerings of the Training and Development group	58	80	85	79
Catalog of programs and services	47	79	61	88
Flyers about individual programs and services	81	84	82	83
Posters	47	71	32	55
Schedule of upcoming programs	75	87	43	75

In addition to online and print, marketing training and development programs involves person-to-person approaches. These are more central to the efforts of external Training and Development professionals—90% use it vs. 49.5% of internal trainers.

One-to-one sales calls are key to the marketing efforts of both internal and external trainers. Internal trainers also highly rank participation in internal events such as employee benefits fairs and technical conferences. External trainers highly rank business shows and open houses. See Table 11.

Table 11: Use and Effectiveness of Face-to-Face Marketing Materials

Type	% of Internal Groups Using This Vehicle	% of Internal Groups that Find It Effective	% of External Groups Using This Vehicle	% of External Groups that Find It Effective
One-to-one sales calls	61	94	79	92
Business shows	N/A	N/A	46	57
Open houses in which staff members are invited to visit the training facilities	30	75	15	56
Participation in internal events	65	83	N/A	N/A
Networking*	N/A	N/A	15	N/A
Speaking engagements*	N/A	N/A	10	N/A

* Results of write-in responses to the “Other” category; as a result, no individual responses on effectiveness.

The most common message both internal and external trainers use in marketing their programs and services is

In terms of when to begin promoting a training program, internal trainers typically start two to four weeks (24.8% of participants) or six to eight weeks (21.1%) before a course is scheduled. External trainers begin much sooner, with 25% starting more than 12 weeks before the course and 25% starting eight to 10 weeks in advance.

improved performance. Among internal trainers, an additional message is promoting competence among workers.

Using this Research

Although your experience might vary from the data presented here, this data provides internal and external trainers a baseline against which to benchmark efforts to promote your group. Or if you are starting an effort to market a group, you can identify some of the primary components you need to include and resources you need to invest for a standard effort.

Beyond that, however, the training profession can look at this data to assess whether we are adequately promoting our organizations, programs, and services, as well as identify areas in which we might either invest more or reduce our efforts. **T**

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