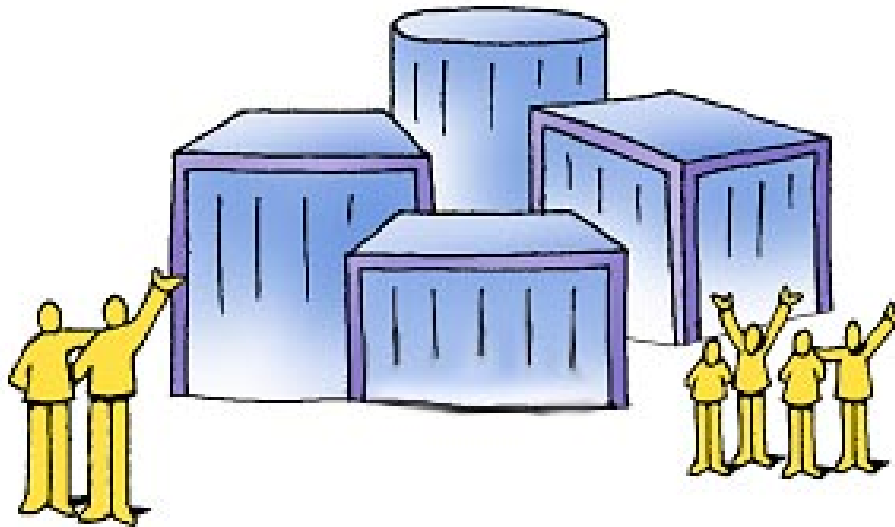


# ENGAGING WORKPLACE PARTNERS

## AN ENGAGEMENT SPECIALIST'S QUICK GUIDE



### NEW WAYS TO WORK

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# ENGAGING WORKPLACE PARTNERS

## FOUR EASY STEPS

Engaging workplace partners is a critical part of building a successful youth-serving initiative and making real connections for youth. As an Engagement Specialist\* you have many tools to work with and people on your team and in your community to help make it happen. There are four easy steps to the successful engagement of employers, labor, government, community organizations and others to support your efforts.\*\*

### STEP 1 – BE PREPARED

- **Understand the labor market** to become familiar with local industry trends and forecasts, and identify those workplace partners that are working effectively with schools and youth programs.
- **Know your products and services** including the range of participation options your organization or school can support, along with the services you can provide to make participation easy.
- **Know your supply of young people and participation options** in order to help target your efforts and effectively match youth with new experiences and new partners with appropriate opportunities.
- **Identify your resources for engagement** so that you can take advantage of the existing structures and individuals who are ready to help you in the engagement process.

### STEP 2 – MAKE A PLAN AND STICK TO IT!

- **State your purpose, goals, and objectives** to help keep you focused and on track with your plan.
- **Define your customer base** in order to focus on potential partners who are likely to be receptive to your message.
- **Qualify the market** paying attention to potential partners in high-growth areas and those that have prior involvement with youth programs and community based activities.
- **Create key messages** to insure consistency and clarity in your marketing and recruitment.
- **Outline your marketing strategies** including a steady balance among the following activity areas:
  - **General Awareness** – media campaigns, events and newsletters.
  - **Targeted Marketing** – mailings, phone campaigns and prospecting.

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\* “Engagement Specialist” refers to anyone whose job function includes recruiting or engaging employers or workplace partners, such as: job developers, placement specialists, account representative, internship coordinators, youth specialists, work-based learning coordinators, industry liaisons, or academy directors.

\*\* Organizations play a critical role in supporting Engagement Specialists in effectively carrying out their role. Those that do an effective job of engaging employers and other workplace partners in their work share five common quality characteristics; they all view the workplace as a primary customer, maintain a strong customer service and sales orientation, target resources to the engagement effort, embrace a systems approach, and practice continuous improvement. For more information see the *Quality Characteristics of Effective Organizations Framework*, available online at [www.newwaystowork.org](http://www.newwaystowork.org).

- **Direct Recruiting** – presentations at meetings, in person and at job fairs or industry events.
- **Create a detailed activities calendar** to help organize your marketing and sales activities.

### STEP 3 – MARKET AND SELL YOUR SERVICE

- **Begin with a focus on customer service**, to ensure that you are able to address the unique needs and circumstances of each prospective partner.
- **Network in multiple circles** in order to raise awareness of your program and to develop relationships with potential workplace partners.
- **Prepare Your Sales Presentation** to address the needs and concerns of prospective workplace partners.
- **Make the sale** by understanding your potential partner’s motivation, and being ready to value all participation commitments.

### STEP 4 – DELIVER FLAWLESS FOLLOW-UP

- **Become the primary resource** for information and problem solving.
- **Support the ongoing participation of your partners** by making sure that their needs and expectations are being met.
- **Deliver on promises**; workplace partners need to be able to count on you.
- **Measure results and share information** to guide decisions and engage your partners in making improvements.
- **Stay in continuous contact** to ensure satisfaction and develop lasting relationships.

#### *Critical Success Factor*

Your role as an Engagement Specialist is unique, and may differ significantly from others on your team who are focused on teaching, delivering classroom training or directly working with youth. You have a different set of customers, and your approach should reflect what it takes to engage that audience. As you prepare to recruit workplace partners to work with your program or school, there are five critical factors to success to keep in mind.

- *Prioritize the workplace as customer.*
- *Become sales and service oriented.*
- *Target resources to the engagement process.*
- *Engage in quality practices.*
- *Utilize a systems approach.*



## **STEP 1 – BE PREPARED**

To be successful as an Engagement Specialist you should be well prepared before calling on a potential workplace partner. That means that you have researched the local labor market, understand the specifics about the industry and business of the potential partner, and are ready to address any pressing needs or concerns. It also means that you have developed a professional approach to engagement that includes a process for making contacts and executing on promises made during a call or meeting. Successful engagement relies on professional tools and materials that make it easy for a workplace partner to become involved.

### **Understand the Labor Market**

Become familiar with the labor market by conducting ongoing research on regional trends, high-growth industries and specific businesses that may have unique workforce or image needs. There are several good sources for labor market information, including your local Employment Development Department office, One-Stop Career Centers, Chambers of Commerce and the business section of your local newspaper. The more time you spend in the “workplace world,” the better prepared you will be to connect to and successfully engage these valuable partners.

### **Know Your Products and Services**

Part of getting ready is making sure that materials and systems for delivering quality services to your workplace partners are in order. Define and promote a sequenced range of participation options that make it easy to begin, and grow your activities based on success. You should have a set of services at your fingertips that respond to identified partner needs, and your materials should reflect this range of options and services. Remember to develop materials that are professional, clear, and in the language of your target audience.

### **Know Your Supply of Young People and Participation Options**

Make sure you understand the systems and structures in your organization that promote career development and support youth readiness for work-based learning and placement. In addition, become aware of the needs and readiness of instructors, counselors and the youth your organization serves. Familiarity with all of the programs that prepare youth for placement in the workplace will allow you to market prepared youth to meet the workplace partners’ needs and match each partner with the most appropriate opportunity.

### **Identify Your Resources for Engagement**

The good news is you are not in this alone. There are a number of existing structures and individuals that are ready to help you in the engagement process.

Begin by meeting with members of your organization’s board of directors, advisory boards and committees as well as key members of local chambers of commerce and industry associations who already have a stake in your program or school. Research and meet with workplace partner champions who have had success with youth programs to solicit their help in building an engagement strategy and identifying potential new partners.

## ***Critical Success Factor***

Answer the following questions to help define your internal resources to support engagement activities.

- *How many staff members are on your team? Are they all fully dedicated to the engagement effort?*
  - *Are there others in the organization or your community that share your responsibility for engaging workplace partners? How can you best organize and coordinate your outreach activities?*
  - *What is your budget to support marketing and sales activities?*
  - *Do you have a ready supply of high quality marketing and sales materials?*
  - *Do you have access to appropriate technology supports?*
- Is your organization or school structured to support the marketing effort when you are out in the field?*



Finally, get to know the landscape of your community. There are many programs and people focused on connecting workplace partners to school and community-based programs for a variety of activities, including job placements, mentoring, equipment and other donations, and volunteer opportunities. There are also workplace partner sponsored efforts, including registered apprenticeship programs and college internship programs. Get to know these programs and the people who work in them. Many have years of experience working with a defined set of workplace partners, and have tested strategies, tools and support systems in place. These potential partners are a resource to you, not your competition.

## **STEP 2 – MAKE A PLAN AND STICK TO IT!**

Having a focused marketing plan will help guide your decisions for outreach to workplace partners. A written plan will keep you from being driven by short-term tasks and help you focus on a strategy that builds from one activity to the next.

A clear plan for engaging workplace partners, based on targeted and proven marketing and selling strategies, makes all the difference in bringing new partners on board. Your goal is to have a defined process to promote your program that engages your potential workplace partners.

### **State Your Purpose, Goals, and Objectives**

It is important to articulate the purpose of your marketing and engagement plan, and to clearly state your goals and objectives. This not only helps you stay focused on the target, but it provides you with markers of success so that you'll know when your plan is working and when it needs to be adjusted for greater success. Your next step is to identify resources targeted to the engagement effort – staff, services, dollars and other resources.

## Define your Customer Base and Qualify the Market

The next step in developing a plan for engagement is to assess the partners you are currently working with. This should help you determine what industries and potential partners you need to engage who will be receptive to your message. Make sure to include current and potential work with these partners in your plan. Then begin to build involvement by focusing on partners in high-growth areas, and those that have prior or existing connections with schools or community-based organizations.

Identify those workplace partners that have:

- A record of hiring young people;
- Skill shortages among entry-level workers;
- Cooperative labor-management relations;
- A commitment to employee training and diversity;
- A need that may be filled by local youth workforce initiatives; and
- Visible involvement in community and educational issues.

When you have targeted those potential partners for your engagement efforts, begin to build lists in a shared contact management database to help keep you and others on your team organized and efficient.

## Create Key Messages

When you have established your goals and objectives and have qualified your market for engagement, it's time to develop succinct messages for each of the audiences you hope to reach. These messages should be simple, direct and clear, stating exactly what products and services you offer to meet potential workplace partner needs. You will use these consistent messages in all of your marketing strategies and deliver them in print, in conversation and in formal presentations – so the key message must be simple and adaptable to all sorts of situations.

### *Critical Success Factor*

Use proven messages that emphasize value when articulating the **benefits** of your program to potential workplace partners. Here are a few examples of messages that work.

- *Reduces training and recruitment costs by directly connecting to the future workforce.*
- *Increases productivity – quality work by youth in the workplace contributes to the bottom line.*
- *Builds employee morale and leadership skills through mentoring and coaching youth or volunteering in classrooms.*
- *Helps create a vibrant community leading to prosperous local economies.*
- *Generates positive exposure from a high profile commitment to youth, education and the community.*



## Outline Your Marketing Strategies

There are three main areas of marketing to include in your plan as a set of equally balanced activities; general awareness, targeted marketing, and direct recruiting. By conducting activities on all three levels at all times, successful engagement specialists can ensure a steady flow of workplace opportunities for youth and new partners for programs and schools.

- **General awareness** activities include media campaigns, special events and other public relations activities. Through these you create name recognition and heightened interest in what your organization does. This supports greater receptivity to your targeted marketing strategies.
- **Targeted marketing** takes advantage of your work in qualifying the market. Direct mail, telemarketing and prospecting in those areas you defined earlier will bring you one step closer to creating opportunities for young people or bringing new partners to your organization or school.
- **Direct recruiting** is where you actually generate opportunities with individual partners. This is done through sales presentations to businesses or business organizations, through job fairs, and through networking activities and direct sales calls on potential customers.



*Remember:* There are times when Engagements Specialists generate significant demand from workplace partners without having the necessary supply of willing and ready youth to fill them or real opportunities for new partners to get involved. It is your responsibility to know when and how many youth will be ready for the workplace, or what opportunities exist for partner involvement before you generate demand. Through coordination and timing of your plan you can balance and support supply and demand so that you meet the needs and expectations of both your program and workplace partners.

## Create a Detailed Activities Calendar

A calendar of activities supports your efforts and helps you organize the timing of your marketing activities for maximum impact. Each of the marketing strategies you define builds on the others. It helps to be strategic in creating a marketing and sales calendar that takes advantage of the high profile you've created through general awareness activities.

## ***Marketing Plan***

A successful Marketing Plan guides your efforts on three levels; the broad concept, which defines your goals, expectations, target audience, and key messages; your specific objectives and the strategies you plan to use to meet those objectives; and finally a detailed calendar of marketing and sales activities to keep your effort on track.

Consider the following outline for your plan:

- *Statement of General Purpose – who you are, broad goals and objectives.*
- *Resources – staff, services, dollars and other resources targeted to the engagement effort*
- *Target Audiences – who you are trying to engage.*
- *Key Messages – value and benefit statements in clear and simple language.*
- *Marketing and Sales Strategies – approaches you plan to use. Includes quantifiable goals and objectives.*
- *Detailed Activities Calendar – to guide daily, weekly and monthly activities.*

## **STEP 3 – MARKET AND SELL YOUR SERVICE**

Once you have a focused plan for engagement, it's time to implement your strategies. Focus on finding long-term partners rather than simply making one-time placements or getting a one-time commitment. Focus on nurturing these relationships over time, and cultivating repeat business in a variety of areas. Long-term partners will allow you to grow workplace partner participation over time and build lasting relationships that will benefit your organization or school and the youth you serve.

### **Begin with a Focus on Customer Service**

Successful results depend on your ability to focus on customer service and address the unique needs and circumstances of each prospective workplace partner. The foundation of long-term relationships with workplace partners is built by providing the kind of service they expect and get from others, not just those in the workforce or education fields.

## ***Critical Success Factor***

Use the following keys to become *customer focused* in the engagement process.

- *Treat partners as highly valued customers.*
- *Learn all you can about the potential workplace partner prior to the first visit.*
- *Respond effectively to the needs and concerns of the partners.*
- *Utilize modern communication systems such as voicemail, pagers and e-mail, adhering to business standards of communication (same day response, voice mail message detailing how quickly you can respond).*
- *Use industry terminology and language, avoiding workforce or educational jargon.*
- *Solve problems and create solutions. Never give excuses.*
- *Under-promise and over-deliver, making promises you can keep and exceed!*
- *Project a “can-do” attitude at all times.*



## **Network in Multiple Circles**

Take advantage of the networking circles that exist for your business partners and become an active member. Regular attendance at industry association, chamber of commerce and service club meetings and events are sure ways to increase the number and range of workplace partners.

## ***Critical Success Factor***

Network in many circles and connect both formally and informally at events and functions.

- *Use employer-to-employer approaches, asking committed workplace partners to develop leads on your behalf.*
- *Leverage existing campaigns and initiatives that build awareness about services to youth in your community*
- *Spend time in the industry or business you seek to target. Attend meetings and events or consider personal job shadows.*
- *Work your personal network assertively, asking family, friends and colleagues for contacts.*
- *Capitalize on opportunities quickly and efficiently.*
- *Qualify leads to ensure there is value for both the partner and your pro.*
- *Keep an organized database that can be accessed by others on your team so that everyone understands the history of each client.*



## Prepare Your Sales Presentation

Once you've landed the opportunity to make a sales presentation, how you choose to use that time becomes critical. Your presentation should be clear and direct, while encouraging questions and comments. If you've been clear when setting the appointment, workplace partners will know exactly what you want. You should connect in a personal way with your host immediately, and let them know that you understand the value of their time.

Use the following general rules when customizing your presentation to a specific workplace partner.

- **Understand their motivation** - When asked why they participate in youth programs or schools, workplace partners generally point to the following factors as primary reasons for their interest and involvement: improving education, workforce development concerns, helping young people, and building positive community relations. Efforts to recruit workplace partners should address these issues and be framed in terms of benefits to the partner.
- **Pick a Strategy** – Ask your workplace partner to think about how to most effectively get involved with your program or school. Encourage building on three approaches: building on what exists, solving a business need, or investing in the community.

### *Build on What Exists*

Many workplace partners already have a commitment to youth programs or schools, especially through employee or member volunteer programs and donations. Local organizations (like yours) provide proven and successful services and connections to the emerging workforce. Building on what already exists inside the workplace and in the community provides maximum impact without re-inventing the wheel.

### *Solve a Business Need*

Workplace partners can meet short-term needs by bringing enthusiastic, skilled young people into the workplace. Interns can help complete meaningful projects and can be a strategic investment in future, loyal employees. Workplace partners also meet marketing objectives and build their customer base through positive exposure and publicity.

### *Invest in Your Community*

Strong communities mean vibrant local economies. Helping build better community programs, strengthening schools, and supporting future leaders benefits everyone. Working with your organization or school allows workplace partners to demonstrate a leadership role in the communities where they live and work.

- **Recognize that all workplace partners are not alike** - Employers and labor unions are not homogenous groups; a variety of factors affect their decisions, including their size, management structure, work environment, business climate and mission. Do your homework before contacting workplace partners; learn as much as you can about their business and industry before you go in to visit.

- **Expect to answer important and hard questions** - Workplace partners want clear, concise explanations. They will want to know about costs and benefits, program administration, design, purpose and the roles and responsibilities of each party. The more you anticipate questions on these issues, the more likely your recruitment efforts are to succeed.
- **Be ready to overcome objections** - Knowing in advance the most common reasons workplace partners give for resisting participation can help you anticipate their concerns and make a stronger appeal. Most commonly, employers share concerns about cost, down-time for their employees and the general issues that surface as a result of having youth in the workplace, or employees volunteering off-site.

## Make the Sale

Once you have prepared your presentation, it's time to make contact. During the call or visit, use what you know about the industry and its operations. Ask informed, open-ended questions to identify needs you can potentially meet. What activities are underway that you might build on? What are the critical needs of the partner that you might address? Might you leverage a commitment to a particular community effort? Your goal is to uncover the potential partner's motivation, emphasize the value and benefits of participation, and describe how your services can facilitate their involvement.

- **Value all participation options** - Remember that providing placements is just one of many participation options for workplace partners in supporting your program. Make sure you value and support a full range of participation options for all of your partners. This will allow you to nurture and grow your relationships over time.
- **Establish next steps** - At the end of a successful recruitment meeting, you will have established a good relationship with the workplace partner through active and careful listening and shared understanding. Complete the meeting with clear agreement on next steps and with whom and when you should make contact for follow-up. Leave behind your professional packet of information for reference.

### *Critical Success Factor*

*Bring successful youth and/or workplace supervisors with you to meetings and presentations to speak about their first-hand experiences with your program. These advocates can be your best spokespeople. Have partners describe how easy it is to participate and the impacts on the workplace. Have youth describe the benefits of contact with and in the workplace. If you plan to use this approach, let your prospective partner know ahead of time who will be attending and why they will be there.*



## STEP 4 - DELIVER FLAWLESS FOLLOW-UP

Remember that the success of your marketing and sales efforts hinges on one critical element — flawless follow-up. It is important to include follow-up in every aspect of your engagement process. This begins with the simple, timely thank-you note or email that thanks the prospective partner for their time, outlines any agreements made and confirms the next steps you will take. Beyond that, delivering quality customer service depends on paying attention to the following lessons gathered from successful engagement specialists around the country.

**Become the primary resource** for information and problem solving. Workplace partners want a single person to depend on to address issues and meet their needs. Your goal is to be that person. That means being the primary information source for connecting with youth and partnering with education and community programs in general. If you cannot solve a problem or meet a need directly, your job is to refer the partner to someone who can, and to follow up and make sure the problem was solved.

**Support the ongoing participation of your partners** by making sure that their needs and expectations are being met. Follow up on regular basis, making yourself available to help resolve any issues or problems that may arise. Regular and ongoing communication will help you nurture and expand activities with each partner over time.

**Deliver on promises;** workplace partners need to be able to count on you. Flawless follow-up relies on continuous improvement and solid communication among all partners. Meeting your commitments, or agreeing to a new timeline or result when you encounter obstacles is a key to long-term, committed partners,

**Measure results and share information** and engage your partners in helping you make improvements in your program. Conduct regular satisfaction surveys and share the results with your partners. Conduct regular performance assessments to guide decisions and make improvements. Examine the effectiveness of your marketing strategies and adjust them as needed. Recognize that you have limited time and resources. Use information to help you focus on the activities that work for you.

**Stay in continuous contact** to ensure satisfaction and develop lasting relationships. Regular periodic check-ins are important.

