

CERIC Project Partner Marketing and Knowledge Dissemination Guidelines

The intent of this document is to support CERIC project partners to successfully publicize their outcomes and promote resources produced through the project. Our joint approach recognizes that project partners are likely busy career development researchers or practitioners and not necessarily marketers. These brief marketing and knowledge dissemination guidelines are for you to review at the beginning of your Project Application submission, as well as reference throughout the development of the project, so that we may collaborate as effectively as possible, with a shared goal of getting your work in front of those who need to know about it.

As you are completing your Project Partnership Application for CERIC funding...

We'd like to encourage you to begin thinking about some marketing considerations early in the process. CERIC wants to work with project partners to ensure your Research or Learning project finds the right audiences and is packaged, communicated and disseminated for maximum impact.

□ Project title – Something catchy

When a project is approved, CERIC will work with you to create a [project page on the CERIC website](#) that provides a summary of the project and provides a space for interestholders to track the project's progress. With this initial announcement, it's very helpful to have a project title that not only captures the subject of the project but also one that highlights who will benefit and how, in a concise and memorable way.

□ Projects goals and objectives – Know your audience

In thinking about your project goals and objectives, it's helpful to consider who the target audience is for your outputs:

- What are the different interestholders who would use this research or learning?
- Have you spoken to members of your target audience to validate your project idea?
- How will their needs differ in terms of what aspect of your work is most relevant to them?
- How might they prefer to receive information and how might they implement it in their respective settings? (consider the learning or knowledge dissemination format that your target audience is most likely to engage with).

□ Partnership development – Can help in multiple ways

Any local, national or international organizations or individuals that may be part of your project design and development can also be thought of from a marketing lens. Engaging partners at the outset in a conversation about how they can shape or participate in the project will increase the partner's interest in sharing eventual results with members or networks. Conversations can also include how the partner

might disseminate project outputs through its various existing channels or co-creation of new opportunities.

□ **Resource creation – What is the product?**

What form the research or learning takes will be critical to its marketing success and overall knowledge dissemination strategy. We know that depending on the project, the nature of the “product (s)” may change during the process or be directly correlated with the anticipated results of the project, making it less clear at the beginning how the product/deliverable will evolve. Keep in mind though, that even if a certain degree of flexibility needs to be accounted for, it is highly beneficial for the project to have at least a preliminary idea of the deliverable(s) so that the associated costs can be accounted for in the Project Application budget. Based on audience needs, you may be looking at creating several different packages to distill key information at varying levels of detail and emphasis. Past CERIC project partners have created:

- Textbooks
- Workbooks
- Guides
- Self-Assessments
- Videos + Companion Guides
- Infographics
- Online Courses or Training Workshops
- Research Reports
- Brochures
- Directories
- Websites
- Case Studies

A few additional words about...

Book publishing. In some cases, when the project results in a book, guide or similar resource, CERIC can support the partner in transforming a manuscript into a published product. While CERIC is not a publishing house, we assist by guiding the process and facilitating key steps, with the partner/author remaining fully responsible for the content.

We expect the partner to provide a finalized manuscript – copy-edited and translated if a bilingual version is planned – and to determine the preferred format (ebook, print, etc.). CERIC can then help co-ordinate publication timelines, distribution and marketing.

It is essential to clarify at the outset if such a resource is expected so that associated costs (e.g., review, copy-editing, translation, design) can be accounted for in the project budget and timeline. You may find it helpful to explore our Publications: Books & Reports page to see examples of past project outputs.

Course development. As part of the [CERIC Learning Hub](#), which offers a variety of learning formats, including online courses, CERIC may select deliverables from funded projects for development into an online course. CERIC can support the partner in transforming a project deliverable into an online course. If this is pursued, a separate agreement outlining the roles, responsibilities, and terms of the collaboration will be entered into between CERIC and the partner.

□ **Information sharing & promotion – How are we reaching out?**

In considering how you will share or promote the project outcomes with the intended audiences, you are beginning to draft a marketing or dissemination plan. If your project is approved, CERIC would like to

support you as much as possible to create a joint marketing approach that aligns interests and leverage resources at each other's disposal.

It helps to be aware of CERIC's range of assets that can support you in this regard. CERIC has a reach of close to 20,000 career development professionals and related interestholders from education, community, government and private sectors. Disseminating your project findings through some of these methods will often be a requirement for projects. Our programs, publications and events include:

- [CERIC's website](#) – in addition to a project page that announces and tracks a project – will also feature any products to emerge on a separate [resource page](#): *You could arrange for testimonials or film a short promo video*
- [Cannexus, Canada's Career Development Conference](#), the country's largest bilingual career development conference, held annually in January in Ottawa as well as virtually: *You could present, host a book launch or screening*
- [Canadian Journal of Career Development](#) (includes both peer-reviewed and non-peer-reviewed content) and is published electronically 2 x year: *You could submit an article*
- [CareerWise](#) and [OrientAction](#), content websites featuring top news and views in the field; popular enewsletters send out a curated roundup each week: *You could write a blog*
- Live [webinars](#) offer free knowledge sharing of project findings through convenient and accessible online learning: *You could present a webinar*
- [Learning Hub](#) offers tailored learning experiences, such as synchronous or asynchronous courses, communities of practice and on-demand webinars. *You could develop a course*
- [Roadshows](#) have taken place across Canada, often as in-person educational networking meetings; virtual roundtables would be an option: *You could present at roadshows/roundtables*

**Please note that for each project that is approved, independent of the options you choose to introduce as part of the overall marketing and knowledge dissemination plan, a Cannexus presentation and a CERIC webinar are standard requirements, part of the legal agreement signed by partners. This is CERIC's way of ensuring equal visibility of all its funded projects and highlights the work of the partners, while showcasing the project's contributions to the field. CERIC staff will guide you through the steps for the conference presentation and the webinar.*

We also have:

- A strong network of regional and national *supporting organizations*
- Capacity to create media pitches/releases and reach out to *journalists*
- A robust *social media* presence on LinkedIn, Facebook and Instagram
- A Google Ad Grant in *free search* advertising

Please review the “Key Elements” of a Marketing and Knowledge Dissemination Plan in the “3-6 months out” section below for some promotional ideas. The intent is not that you plan to undertake all of these, but rather to provide you with some alternatives and examples to reflect on. Each project is unique, and the marketing and knowledge dissemination plan should be tailored to its needs, audience and expected impact.

As you move through the project...

While some projects may continue to align closely to the original thinking around audience, product and promotion, others may evolve, especially complex projects with a multi-year time horizon. As changes emerge in your thinking or findings that may impact how we collaborate with you marketing these outputs, please keep us updated so we might best prepare.

Questions

Beyond the initial announcement and prior to having the final product available...

- Will you need CERIC's help with communications related to the project?
For example, disseminating a survey or finding focus group participants
- Will you also have interim findings that could be packaged and disseminated?
- Will you need feedback or help in reviewing?
- Will you re-engage partners to maintain relationships established at the outset?

As you look ahead 3-6 months towards project completion and launch...

This is the usual timeframe where CERIC can work with you more closely to develop a marketing and knowledge dissemination plan for your final project outputs.

Key Elements of a Marketing and Knowledge Dissemination Plan

A standard project marketing plan consists of an analysis and set of actions to achieve objectives. It includes a discussion of the target audience and determining the best mix of strategies and tactics to reach them. Marketing and knowledge dissemination plans provide a blueprint but remain flexible to changing conditions and new opportunities.

1. SWOT Analysis

It is advisable to start with an analysis of the Strengths, Weaknesses (internal), Opportunities and Threats (external) in the current environment that would affect marketing the project.

2. Goals

Given the current environment, what are the "big-picture" aims of marketing this project. What do we want to achieve? Do you have any metrics or expectations for what would make the project successful?

3. Target Audiences

Next, you want to define the groups that need to know about the project findings or are expected to use the resources that emerge from the project. Consider:

- Who are both the primary, and secondary audiences if any?
- What do we know about them (demographics, attitudes, behaviours)?
- What will they find of value within the project, i.e., what is their need?
- How are they usually digesting information and learning content?

4. Key Messages

Key messages consist of what we want to communicate to our target audiences. These messages may vary by group. But it's helpful to consider:

- What are the 2 or 3 main “headlines” that emerge from the project?
- What is the overall story we are trying to convey?
- What is the single most important thing we can tell each audience?

5. Budget

Funds for project dissemination should be embedded in your initial overall project budget, submitted in the application process. Since a Cannexus presentation and a webinar are standard elements of the marketing and knowledge dissemination plan, any associated costs should be included in the project's timeline and budget, from the beginning (such as registration costs, travel and accommodation to present in Ottawa, etc.)

For multi-year projects, partners have, in some cases, opted for multiple presentations at Cannexus, for example to present preliminary results and include the audience's feedback in the project and another session the following year to present the final results.

Additional costs may be built into your project budget at a later date, such as travel to present your findings at other conferences or other knowledge dissemination opportunities (we will do our best to support these extra costs, but they are dependent on other budget considerations, so there are no guarantees of extra funding for project marketing). Beyond this, CERIC may be able to support you with select low and no-cost marketing activities, in particular, drawing on our own assets.

6. Strategy / Tactics

While not intended to be a definitive list, hopefully these strategies and tactics offer some practical examples to take action and allow you to generate more ideas. We can think of the strategy as the “what” we're going to do and the tactics as the “how” we're going to do it.

a. **Public/Media Relations**

- Identify topical issues, trends, milestones or recent stats that link to your project
- Issue a newsworthy media release and pitch to specific journalists or producers
- Write an opinion piece or article to contribute to a publication

Tip! Often, your own organization (especially universities) will have media and communications experts and channels to leverage. CERIC also offers a free [Media Relations Training course](#)

[Sample media release](#) | [Sample media pitches](#)

Pro: Can generate high-profile coverage and reach a wide audience through mainstream media

Con: Coverage isn't guaranteed and may not be the targeted audience you wish you to reach

b. **Conferences & Events**

- Present at a conference, class, workshop or webinar

- Sponsor, exhibit or distribute material through an event
- Create your own event or in collaboration with partners

Tip! Think about how you can reach more people at a lower cost through virtual presentations

Pro: Can find the specific audience you are seeking; opportunity for engagement & feedback

Con: Turnout can vary; if events are outside your area, travel can be time-consuming and costly

c. **Partners & Influencers**

- Connect with relevant associations or policymakers, and reach out to your own network
- Send a complimentary copy of your resource along with a letter of introduction
- Create “marketing toolkits” of shareable content for partner newsletters, social channels

Tip! Sending a review copy can be a great way to generate testimonials and advance interest

Pro: The credibility and reach of partners can help to find and persuade your target consumers

Con: Relationship-building can take time; partners may seek a direct benefit to lending support

d. **Content Creation**

- “Chunk” your content into more digestible formats
- Write a series of blogs related to the project
- Create an infographic, video or podcast for more multimedia content

[Sample infographic](#) | [Sample podcast](#)

Pro: Presents content in varied but mutually reinforcing ways to cater to different preferences

Con: Can require some specialized graphic design or production skills and tools

e. **Social Media**

- Use a variety of social media platforms frequented by your target audience
- Find relevant conversations related to the project through hashtags
- Tag individuals and organizations who can share your content

Pro: Cost-effective to raise awareness, thought leadership, and drive traffic & build interaction

Con: It takes an investment of time to build your network & profile and to actively manage it

f. **Advertising**

- Print, digital or search ads or advertising on web and social platforms
- Negotiating free “exchanges” with associations or publications
- Direct mail postcards or inserts into other mailings

Pro: Allows you to expand your audience and deliver your message directly

Con: Can be expensive, difficult to know direct ROI or messages get ignored with info overload

7. **Measurement & Evaluation**

Measurement of marketing outcomes should be integrated into measurement requirements stated in the project application and final reporting around how you will know if your project has been successful.