MARKETING THE SIYB PROGRAMME

A manual for training managers

Developed by the ILO SIYB regional project for Eastern and Southern Africa and adapted by the SIYB Sri Lanka project

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i. Preface

This is the first edition of the Marketing Manual for the development of your corporate SIYB marketing plan. The Marketing Manual is for you if you are directly involved in programme design and implementation and if you have an active stake in the marketing of the SIYB training package.

The Marketing Manual assists you to embark on a more systematic marketing drive for the SIYB programme. It guides you through the steps of designing an SIYB marketing plan and introduces you to some techniques of successfully managing the marketing effort in practice. The contents of the Marketing Manual are based on the marketing strategies and tools used by pro-active SIYB training providers worldwide. Information collected from the field has been blended with 20 years accumulated experience of the global SIYB programme and complemented with theory from marketing textbooks.

The manual is designed to suit SIYB training managers who have little time to study and don’t want to fight their way through a largely theoretical text. The use of technical terms is reduced to a core set and graphics illustrate the main message. The central focus is on the application of marketing theory to your work environment.

The chapters have a modular structure to enable you to complete the individual lectures as and when you can afford the time. You can the use the manual for self-study, or, register for a four-day market development workshop for training managers conducted by the local SIYB project office. The workshop provides you with an opportunity to develop a marketing plan together with other SIYB marketers, and to seek professional assistance in the process.
ii. Markets, marketing and marketing management: A brief terminology

What is marketing? To understand the meaning of marketing, you have to know first what a market is. A market consists of all the potential customers sharing a particular need or want who might be willing and able to engage in exchange to satisfy that need or want.

Building up on the definition of a market, the term marketing stands for a social and managerial process by which individuals and groups obtain what they need and want through creating, offering, and exchanging products of value with others. Translated in the context of this manual, marketing is about providing your customers with an SIYB training package that is customized to their needs and/or wants.

Marketing management, finally, is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that satisfy individual and organizational goals. For you as a training manager, SIYB marketing management is especially important, to fully unlock the potential of the SIYB training package for your customers and your organization. This manual is all about the SIYB marketing management process.

iii. Overview of the SIYB marketing management process

The SIYB marketing management process describes the various steps involved in the development and successive implementation of your own SIYB marketing plan. Five steps are distinguished in the following:

The SIYB marketing management process

1. Define the SIYB training objective
2. Identify the SIYB market opportunity
3. Select the SIYB target group
4. Develop the SIYB marketing plan
5. Manage the SIYB marketing effort

1 All definitions from Kotler, Philip 1997: Marketing Management, ninth edition, New Jersey, p. 13-15
1. In the first step, you define why your organization has decided to set up and run an SIYB training programme (the objective of SIYB training) and what exactly it wants to achieve with the effort. An SIYB training programme, here, is defined as a set of SIYB training interventions grouped under a common programmatic goal and carried out over a specified period of time (i.e. one year). An SIYB programme is not to be confused with a single SIYB training intervention(!)

2. In the second step, you identify a market opportunity for SIYB training that matches with the competitive edge of your organization.

3. In the third step, you select the training target group and a training sponsor. The selection is based on market information that you collect by means of a market survey, and is done by segmenting the spectrum of your market and by comparing the attractiveness of each segment

4. In the fourth step, you write down what you will do to market SIYB to that market segment. You specify the details of your marketing mix, i.e. the decisions you have taken and the activities you plan to carry out with regards to the SIYB training product, price, place and promotion

5. In the fifth step, you implement your marketing plan, using a set of management tools in the process to control progress and measure impact.

In the following chapters you will be taken step by step through the SIYB marketing management process.

iv. Why a systematic approach to marketing training is important

Marketing is relevant for your organization, whether you are a public or a private sector institution, and whether you are registered as a non-profit organization or as a commercial business.

A systematic approach to marketing the SIYB programme puts your organization in a position to:

- design and deliver needs-based, customized training
- gradually increase the training cost recovery rate through fees paid by your clients and as a result, gradually decrease the dependence of your organization on training subsidies from sponsors
- professionally manage your own product/service portfolio and to differentiate your services from competitors
- diversify your customer base and consolidate or expand your market position
- attract and link up with prospective sponsors for your services, e.g. donor agencies or large-scale companies.

In today’s competitive world, a systematic approach to marketing of SIYB training, actually to marketing of any kind of service or product you offer, is essential for the success of your organization.
1. Define the overall objective of SIYB training

Introduction

The first step in the marketing management process is to formulate the overall objective of SIYB training programme run by your organization. You need to formulate the SIYB training programme objective to focus your mind; otherwise you run the risk of developing a marketing effort that is not in line with the aims or overall mission mandate of your organization.

What is an overall objective

An overall objective describes the ultimate goal of a particular programme or project, or even an entire organization. The overall objective is the guiding framework and determines the overall direction of your effort but unlike the immediate objective of your marketing plan (refer to chapter) it usually does not specify a specific target in time.

Development objectives typically start like “The overall objective is to contribute to…”, followed by a description of the ultimate goal, like ‘peace and stability, private sector development, more and better jobs’. Development objectives are preferably short and as specific as possible; for example, ‘economic empowerment of physically or mentally handicapped people’ is more specific than ‘economic empowerment of disadvantaged social groups’.

How to define the overall objective of SIYB training

To define the SIYB training objective, take out the written mission statement of your organization. The mission statement formulates the broader aims of your organization.

The mission statement does usually not explain why your organization decided to embark particularly on SIYB training. Therefore, it is your task to deduce the overall objective of SIYB training from that mission statement.

For that purpose, and looking at the mission statement of your organization, you have to ask yourself the following questions:
What are the main objectives of my organization?
How can SIYB training contribute to the achievement of these objectives?

The answer to the first question should come out clearly from the mission statement. To answer the second question, picture the kind of positive change that SIYB training would achieve in contributing to the pursuit of the broader objectives of your organization. That positive change is the goal or objective of SIYB training.

A consultant company called ‘Business Consult’ offers training and advisory services to Small and Medium Enterprises. The company is owned and run by a team of four trainer-consultants. The company operates from a small office in the capital city.

Business Consult has recently joined the SIYB programme as a Partner Organization. Business Consult now wants to develop a marketing strategy for the new training product.

As a starting point, Business Consult refers to its corporate mission statement. The mission statement reads as follows: “The mission of Business Consult is to contribute to economic growth and employment creation through the delivery of needs-based business extension services for small-scale entrepreneurs."

Within these broader policy coordinates, Business Consult fixes the objective of the SIYB programme as follows: The overall objective of providing SIYB training is to contribute to the creation of new and better jobs through business start-up and management training.”

Sometimes you will find that

- the mission statement of your organization is too broad to easily deduct the overall objective of SIYB training from it; for example, government agencies often formulate all-inclusive mission statements because they are expected to provide non-discriminatory access to their services.
- your organization has formulated no written mission statement yet.

If the mission statement of your organization is very broad, or your organization has not formulated a mission statement yet, try to picture how SIYB training could fit best into the current service/product portfolio of your organization and how it could contribute best to the success of these various other activities.

In larger organizations implementing SIYB training, training activities are often grouped under a separate department and part of a larger training programme. Where this is the case, you will have to refer to both the mission statement of your organization and the training programme objectives and/or policy guidelines of your department and take them as the framework for the formulation of your SIYB training objective.
Exercise 1

Formulate the objective of SIYB training for your organization:

1. Look for a copy of the mission statement of your organization and study it carefully. Ask yourself: What is the main objective of my organization and how can SIYB training contribute towards its achievement?

2. Formulate a statement starting with: “The objective of SIYB training is to....”. Make it short and clear, if possible use only one single sentence.

3. When you have formulated the overall objective of SIYB training for your organization, please copy it to the blank SIYB marketing plan in the back of this manual.
2. Identify market opportunities for SIYB training

Introduction

In the second step of the marketing management process, you screen the market environment to identify market opportunities for SIYB training. Even if your organization has a very clear mission mandate binding it to work in a specific area and for one defined target group, you should read this chapter carefully: Every organization can benefit from the identification of new market opportunities for training, i.e. to diversify its customer base and to enter new markets.

What is a SWOT analysis

The term SWOT stands for

Strengths
Weaknesses
Opportunities
Threats

A SWOT analysis consists of three steps. You

1. assess the Strengths and Weaknesses of your own organization
2. analyze Opportunities and Threats of your market environment
3. Choose the market opportunity for SIYB training that matches best the competitive edge of your organization.

How to conduct a SWOT analysis for SIYB training

Illustrated on the next page is how you can apply the method of a SWOT analysis to identify a market opportunity for training that suits the capacity of your own organization best:
1. **Analyze the Opportunities and Threats for SIYB training on the local market**

The first step of your SWOT analysis is to scan the local market for management skills training targeting small-scale entrepreneurs. Your local market for small enterprise training comprises of all potential and existing small entrepreneurs sharing these two characteristics:
- a need or want for management skills training
- the ability to acquire these training services (with or without financial support from a sponsor).

The needs and wants of small entrepreneurs, and their buying decision, are influenced through various inter-linked forces in the market environment. The major forces in the market environment are illustrated in the figure below.
- Technological forces
- Competitive forces
- Political and legal forces
- Economic forces
- Cultural and social forces

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2 Therefore, and strictly speaking, your SWOT analysis is a “OTSW” analysis since you start with Opportunities and Threats of your market environment and do the institutional Strengths and Weaknesses analysis later.
Technological forces

Technological forces are a result of the development of new technologies (both know-how and hardware), usually to execute a given task better, faster and cheaper. Technological forces directly impact on small entrepreneurs, both in negative and positive ways. For instance, the invention of the cellular phone has opened plenty of new business opportunities for small entrepreneurs (e.g. the provision of mobile telephone services in neighborhoods with no access to fixed phone lines). In turn, the ongoing computerization of the electronic systems of cars is a threat to car mechanics operating small workshops. The tools and machinery needed to maintain and repair this new technology are often too expensive for them.

Cultural and social forces

The needs and wants of your clients are determined, among others, by their culture and religion. Their beliefs and values – and the gradual shifts in these values – impact as a force on the market for SME training. For example, women entrepreneurs are increasingly recognized as a major engine of economic development. With changing social status, these women entrepreneurs develop new demands and needs and can become a prospective market segment for training suppliers.

Competitive forces

Competition is rivalry among businesses seeking to satisfy the same markets. All of your potential clients are subject to competitive forces of some kind, usually resulting in pressure for innovation or rationalization. For instance, tuck-shop operators might come under severe competitive pressure from a supermarket opening in the neighborhood. They will have to specialize their product selection or rationalize their operations to stay in business.

Economic forces

Economic forces are the tangible impact of the dynamics of the overall economy, business cycles, consumer income, currency exchange rates, consumer tastes and consumption patterns, among others, on small entrepreneurs. For instance, the sudden devaluation of the local currency can threaten the viability of small-scale enterprises retailing imported products. In turn, the same devaluation can open new business opportunities for small entrepreneurs producing handicraft for export.

Political and legal forces

The major political and legal force impacting on small entrepreneurs emanates from government bodies on various functional levels; these bodies set the legal and political framework regulating all economic activities. For instance, a decision by the authorities to ban informal traders from the Central Business District can seriously threaten the operations of this group. In turn, a tax exemption for imported mini-buses might offer small entrepreneurs a one-off opportunity to purchase a vehicle and set up a commuter transport business.
The impact of these forces on small-scale entrepreneurs results in training opportunities, and sometimes threats for your organization. For instance, the changing role of women in the economy and society creates new training opportunities. These women form a large market segment of potential new clients with need and demand for SIYB training. In turn, the same force of change can pose a threat; for example, if your training courses are not gender-sensitive, customers and training sponsors might turn away.

Therefore, you have to monitor these forces in the market environment for training:

- Read the local newspapers and magazines.
- Watch the main news on television and listen to the radio.
- Discuss with your colleagues.
- Talk to the small entrepreneurs on the ground.  

To filter out the relevant market information from the sources listed above, be highly selective. Don’t pay too much attention to fads and fashions but rather concentrate on the identification of trends. Trends are an expression of a fundamental change in the basic patterns of society and economy. One example for a trend is the phenomenon of Globalization. The growing integration of national economies in the world market as a result of, among others, liberalized trade regimes and trans-border communication systems translates into multiple market forces pushing and pulling small-scale entrepreneurs. For example, small-scale entrepreneurs face competition from cheap imports or are forced to communicate in English; the need to adapt and innovate results in market opportunities for training.

Observe the trends in your local market and ask yourself if they might result in a market opportunity for training. If you feel that they do, specify that training opportunity in a brief statement and write it down. If you identify several market opportunities for SIYB training, list them all and prioritize them. Repeat the same exercise for market threats; if you identify any market threats SIYB training, list and prioritize them, with explanation. The illustration on the next page shows how you can list and prioritize the market opportunities and market threats for SIYB training.

### Opportunities and threats analysis form

<table>
<thead>
<tr>
<th>Market opportunities for SIYB training services</th>
<th>Description of the opportunity</th>
<th>Score</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Market threats</th>
<th>Description of the threat</th>
<th>Score</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
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<td></td>
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</tbody>
</table>

3 For a list of more information sources and market research techniques, please refer to page 12 of the IYB Basics Marketing Manual.
2. **Assess the Strengths and Weaknesses of your organization**

In the second step of your SWOT analysis you have to determine the competitive edge of your organization. To determine the competitive edge of your organization, you assess its strengths and weaknesses both internally and with regards to other suppliers in the market.

**Institutional self-assessment**

Your internal institutional strengths and weaknesses analysis should focus on:

- *Training capacity.* The training capacity of an organization is both a function of physical infrastructure (like the number of office branches and training facilities, training equipment) and the qualification and commitment of its training staff.

- *Market reputation.* The ability of your organization to successfully market the SIYB training product is also a function of your reputation among clients and sponsors alike. The awareness about and perception of your organization in the mind of these two groups can “make or break” the market exchange for training.

- *Financial situation.* Your organization will likely need investing some resources to consolidate or expand its market position; accordingly, the availability of such resources is a measure of the likely pull of your marketing effort.

Listed below are selected assessment criteria performance benchmarks linking back to the three main parameters above; you can use these criteria, and any other criteria you deem relevant, to conduct your institutional self-assessment.

**Institutional self-assessment form**

<table>
<thead>
<tr>
<th>Criteria/Indicator</th>
<th>Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>High/excellent</td>
</tr>
<tr>
<td></td>
<td>✓ = tick where appropriate</td>
</tr>
<tr>
<td>Track record in training</td>
<td></td>
</tr>
<tr>
<td>Training impact</td>
<td></td>
</tr>
<tr>
<td>Full-time training staff (less than two=low, 2-5 average, more than 5 high)</td>
<td></td>
</tr>
<tr>
<td>Experience of these trainers</td>
<td></td>
</tr>
<tr>
<td>Outreach of the training distribution system (e.g. through district offices)</td>
<td></td>
</tr>
<tr>
<td>Current market reputation</td>
<td></td>
</tr>
<tr>
<td>Customer awareness about the organization</td>
<td></td>
</tr>
<tr>
<td>Customer perception of the organization</td>
<td></td>
</tr>
<tr>
<td>Existing linkages to training sponsors (e.g. donor agencies, government)</td>
<td></td>
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<tr>
<td>Regular budgetary resources for marketing</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
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</tbody>
</table>
Competitor analysis

The competitor analysis focuses on the strengths and weakness of your organization by comparison to other training suppliers in the market. To conduct a competitor analysis, use the institutional self-assessment form that you have completed earlier, and screen the strengths and weaknesses of other organizations supplying management skills training to small-scale entrepreneurs. Fill in one assessment form for each competitor.

If you lack the information to qualify a particular question on the form, conduct some market survey about your competitors. Talk to friends in the business community, study the promotional materials of your competitors, order a copy of their annual reports, inquire about a price list and make a snap survey in your target market about the awareness of your potential customers about other training packages and competitors.

3. Choose the market opportunity for SIYB training that matches the competitive edge of your organization

In the final step of the SWOT analysis you compare the results of you opportunity and threats analysis, and the institutional strengths and weaknesses assessment, including the institutional self-assessment and the competitor analysis. Find out whether your organization has the effective training capacity and the resources to meet a particular market opportunity, and whether it is strong enough to penetrate and/or defend that market under competition from third parties. Begin with your top market opportunity, and work your way down the list. Choose the market opportunity that matches best with the competitive edge of your organization. Then look again at the market threats listed earlier. Do these threats pose a serious challenge to your organization, as far as that particular market opportunity is concerned? If not, then you have found the market opportunity most suitable for your organization. If yes, repeat the same analysis with the next market opportunity on your short-list and until you are satisfied with the result.

Business Consult carefully analyzes the trends in their local market. It pays particular attention to the ongoing structural adjustment programme of the government, and the opportunities emanating from it. Business Consult lists three possible market opportunities and two threats:

**Opportunities**
- The ongoing public sector reform with retrenchment of civil servants
- The privatization of a large-scale parastatal mining company and the resulting job losses for hundreds of workers
- The liberalization of producer prices for agricultural products, resulting in new production incentives for small-scale farmers

**Threats**
- Both corporate customers and small-scale entrepreneurs attribute low priority to basic management skills training
- Customers are often not willing or able to pay the full costs of training.

Next, Business Consult carefully analyzes its institutional strengths and weaknesses and makes a competitor analysis:
It's assessment is as follows: Full-time training staff is limited by staff members are highly qualified. The market outreach of the company, particularly its customer-support network, is limited due to lack of branch offices. The company is not well known to the wider public. Small-scale entrepreneurs usually don't recognize the brand name ‘Business Consult’. The company is, however, recognized by a small group of corporate clients. Business Consult offers its services with a profit interest and thus tends to be more expensive than its competitors. The company has a small budget allocation for marketing.

Based on its institutional self-assessment and the competitor analysis, Business Consult decides to focus on the parastatal mining company and its employees posed for retrenchment. Business Consult feels that it has the capacity to link up with these retrenches, by marketing the SIYB programme to the management of the mining company. More in particular, Business Consult plans to persuade the management of the mining company to sponsor business start-up training for redundant labour, possibly as part of their retrenchment package and financed through a commission on the terminal allowance payable.

Business Consult plans to use its existing network linkages to other corporate businesses to access the management of the mining company. According to its competitor analysis, there is no other company with a similar or superior competitive edge in the target market.

In the estimation of Business Consult, the market threats to SIYB training posed by low priority attributed by clients to business management skills training and their lack of purchasing power, seem to be limited in the target market. They expect many of the retrenched workers to be highly interested in the perspective of self-employment; they also assume that the mining company has some resources to sponsor training and that donor agencies might have an interest to sponsor a social adjustment programme.

Follow these four steps to select your own SIYB market opportunity:
1. Scan the local market for training opportunities. Conduct an internal assessment of the strengths and weaknesses of your own organization, particularly with regards to training of small enterprises.
2. Compare these market opportunities with your competitive edge as a training provider and choose the market opportunity that matches best.
3. Write down and describe the chosen market opportunity in the blank marketing plan in the back of this manual, and explain why you have decided for it.
3. Select the SIYB Target Group

Introduction

Once you have selected the SIYB market opportunity that best matches the institutional training capacity of your organization, your next task is to zoom in on the spectrum of customers within the target market and to select a prospective segment.

Where necessary, you will also have to identify a training sponsor agreeing to subsidize training services for the chosen market segment. To that purpose you must segment the spectrum of training sponsors to identify institutions with a mandate for enterprise development and a particular focus on that market segment.

What is market segmentation

Market segmentation relates to the process of dividing the spectrum of customers in the target market into different segments with clear and distinguishable characteristics and to choose the market segment that your organization can serve best.

Market segmentation offers several benefits. Market segmentation
- increases the targeting precision of the marketing efforts of your organization, ie. to avoid segments that are heavily competed or to choose a segment of customers that are likely to be able to pay all costs of training
- helps your organization to collect the market information necessary to fine-tune and tailor-make SIYB training and to offer your customers what they want and need.

How to segment the market

Marketing segmentation comprises of three steps:
1. Survey the target group spectrum
2. Develop profiles of the resulting market segments
3. Evaluate the attractiveness of each market segment and select the most attractive market segment.
1. **Survey the target group spectrum**

In the surveying stage, you conduct market research to gain insight into the needs and wants of all your potential customers in the chosen target market. Focus on information that is likely to determine the needs and wants of your potential clients. Find out

- which demographic characteristics your potential clients have and where they live
- what their preferences and perceived needs are (particularly if they feel they need business start-up and management training)
- if they are aware of SIYB (where applicable).

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**Business Consult** has identified the restructuring process in a large local parastatal mining company as their market opportunity for SIYB training. Within that market, Business Consult considers all workers and employees laid off in the restructuring process as potential clients.

Business Consult conducts market research about that target group spectrum. For that purpose, they design a questionnaire and then interview a sample of their potential clients, after having sought the agreement of the management of the company. They ask their potential clients the following questions:

1. How old are you?
2. What formal education do you have (primary, secondary, tertiary)?
3. In your own estimation, which income group do you belong to (choose between high income, medium income, low income)?
4. What is your current occupation?
5. Are you already running your own business?
6. If not, would you be interested to start your own business?
7. Do you already have a concrete business idea?
8. Do you have any collateral to access a business loan?
9. Do you have (access to) technical skills relevant to the planned line of business?
10. Do you know the SIYB programme?
11. Have you passed through business start-up and management training before?
12. What would you expect from a business start-up and management seminar, both in terms of venue and contents of training?
13. How much would you be ready to pay for/contribute to a training seminar?

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2. **Develop profiles of market segments**

When you have completed your market research you move on to the profiling stage. In the profiling stage, you distinguish main sub-groups or segments in the target market and develop profiles of the various segments within your target group spectrum.

You will usually choose one key segmentation criteria or indicator to distinguish main market segments. For example, you can use

- geographic criteria (where people live)

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demographic criteria (age, gender, education)
access to financial resources (income, savings, collateral)
psychographic criteria (personality life-style, personal values)
behavioral criteria (i.e. benefits desired, usage rate of a product or service).

Always make sure that the key indicator used is verifiable. For instance, your potential customers might hesitate to reveal their net monthly income to you but few of them will refuse to reveal their education status attained. Also make sure that your key segmentation criteria is relevant for the purpose of your planned marketing effort. For example, if your main interest is to identify market segments that can pay the full costs for training, you will likely focus on segmenting criteria like income and savings. On the other hand, if you plan to focus on a particular social group or age group, your main focus will be on demographic indicators.

Business Consult has analyzed the results of the market research and knows now that the spectrum of potential clients in the mining company consists of several groups of people with varying qualifications, perspectives and financial resources available. Business Consult chooses professional background of these clients as main segmentation criteria and distinguishes three main segments:

- Segment 1: Senior professionals and executive managers. This group of retrenches has an excellent education (tertiary education), highly specialized skills and long experience on the job, they will receive the “golden handshake” (that is a highly attractive retrenchment package) and they are looking for a new work challenge. Self-employment as an entrepreneur is one opportunity to them. They will expect quality business start-up training in a top-class training environment. They are able (not necessarily willing) to pay in full for services rendered. They know about business management

- Segment 2: Skilled workers and junior professionals. This group of retrenches has a good or excellent education (secondary education or higher), specialized skills but (at least in the latter case) less experience on the job. They will receive a significant retrenchment package. They know that formal job opportunities are few on the labour market and they are seriously considering starting and running their own businesses. They have not run their own business before, but they have often thought about the possibility of doing it. They are looking for technical assistance from a qualified training provider that is delivering cost-effective services; they are ready to meet part of the costs of training. They have some knowledge of business management.

- Segment 3: Support staff and unskilled workers. This group of retrenches might have only had access to basic education. They will receive a small retrenchment package. They are interested to start and run their own businesses, but they lack the relevant technical skills and the business start-up capital. They can not pay for training. They have no knowledge about business management.

3. **Evaluate the attractiveness of each segment**

In the third step of the market segmentation process, you evaluate the attractiveness of the various market segments or sub-groups.
The objective of the comparative analysis is to identify the market segment that can fully benefit from SIYB training and matches best your competitive edge as a service provider.

To facilitate the evaluation process, you might want to list first the characteristics of an “ideal” target group of high-potential customers and then compare profiles of the existing market segments with that best-case scenario. The market segment that comes closest to your ideal target group is likely to be your final choice.

If you have identified more than one market segment with a clear potential for SIYB training and you don’t know which one to choose then you might decide to take them both. In fact, your organization has various possibilities how to proceed: It might choose only one segment (single segment-concentration) or select a number of segments, thus diversifying risk and reaching out for a larger number of clients (selective specialization).

Your final choice is likely to be determined by the institutional training capacity of your organization and access to the resources needed to finance training. For more details how to source funding for training refer below to the next sub-chapter.

To evaluate the attractiveness of the three market segments of retrenchees, Business Consult first defines the characteristics of their ideal market segment. Their ideal market segment would:
- be able to read and write in the language of training
- be able to make basic calculations
- have a concrete business idea (and the commitment to pursue it through)
- have the technical skills relevant for the planned business (SYB only)
- have been in business for more than a year (IYB only)
- have, or have access to, business start-up capital
- be able to pay the full training costs
- have an explicit want for (SIYB) training.

Next, Business Consult compares the three existing market segments of retrenchees with that best-case scenario. Their results are highlighted below.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Segment 1</th>
<th>Segment 2</th>
<th>Segment 3</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Able to read and write in the language of the training materials</td>
<td>↑</td>
<td>↑</td>
<td>➤</td>
<td>Simplified SIYB training materials for lower ranks?</td>
</tr>
<tr>
<td>Able to make basic calculations</td>
<td>➤</td>
<td></td>
<td>➤</td>
<td></td>
</tr>
<tr>
<td>Has a concrete business idea</td>
<td>➤</td>
<td></td>
<td></td>
<td>Segment 3 would need GYBI workshop first</td>
</tr>
<tr>
<td>... and the commitment to pursue it</td>
<td>➤</td>
<td></td>
<td>➤</td>
<td></td>
</tr>
<tr>
<td>Has, or has access to, technical skills relevant for the planned business</td>
<td>➤</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Has been in business for more than a year (IYB only)</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Has, or has access to, business start-up capital</td>
<td>➤</td>
<td></td>
<td></td>
<td>Segment 3 would have to be linked to credit providers</td>
</tr>
</tbody>
</table>

Key:
- = Yes
- = No
- = maybe
Able to pay all training costs |  |  | Are they also willing to do so?
--- | --- | ---
Want training |  |  |  |

Comparing the profiles of the three market segment of retrenchees, Business Consult decides to opt for the market segment number 2. Business Consult feels that this target group can fully benefit from SIYB training. Furthermore, they are likely to have strong demand and real need for training. The only weakness of that target group is their likely incapability (or unwillingness) to cover the full costs of training. Business Consult, therefore, decides to search for a potential training sponsor

**How to identify a training sponsor**

Often, the chosen market segment is either not able or not willing to meet the full costs of training. Typically, they will be asked to cover part of the training costs; a training sponsor is needed to subsidize the market exchange.

A sponsor can be a governmental agency, a multi-bilateral development cooperation agency, a private company, an NGO, or even an individual. In marketing terms, training sponsors are considered agents or agent middlemen. They do not acquire ownership of the service - they merely broker access to a service for the customers.

The relationship between the training supplier (your organization), the training sponsor and the customer is illustrated below:

**Who pays for training?**
To identify a potential training sponsor, you use the same segmentation techniques that you used to segment your customer market:

1. Conduct market research about the potential training sponsors in your local market, i.e. along the following research parameter:
   - type of organization
   - mission statement
   - main target groups of the organization
   - service portfolio
   - programmatic focus
   - budget to sponsor training activities
   - history of sponsoring your (training) activities
   - current status of your bilateral networking relations.

2. Develop a standard profile form, based on the parameters listed above, and complete one form for each potential training sponsor

3. Evaluate the attractiveness of each profile and choose the sponsor that is most likely to support training interventions for your selected target group.

When you segment the spectrum of training sponsors, always keep in mind that the training sponsor should match your customer segment of choice, not vice versa. In a true marketing approach, you put the needs and wants of the customer in the center of your attention. The training sponsor should assist in the initiation of, but never predetermine a sustainable market exchange for SIYB training.

Finally, always aim to keep your dependence on subsidies low and to recover as many of your training costs as possible directly from your clients. Strong reliance on training sponsors bears many risks.

One risk is that training suppliers strongly relying on donor subsidies tend to be fixed on the needs and wants of these so-called “institutional clients” and not on the needs and wants of their actual customers. Customers might not complain because they received training for free but they often attribute low value to such training events. As soon as the subsidy dries up, the market exchange collapses. Another risk is that the organizations exclusively or strongly relying on subsidies are highly vulnerable to sudden policy shifts and changing funding patterns of the donor agency.

In both cases, the market exchange for training is effectively determined by the training sponsor, and not by the suppliers or their customers. Such a set-up offers not prospects for long-term sustainability.

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5 Most of these parameters are also relevant for collecting information about individuals regarded as potential sponsors
Business Consult collects data about all potential training sponsors in the market, using as information sources annual reports, promotional brochures, newspaper reports and magazine articles, among others. Business Consult then develops a standard profile card and fills in one card for each potential training sponsor.

Business Consult uses these standard profiles to compare the attractiveness of each potential training sponsor, and to come up with a ranking of prospective partners. The comparative analysis of the attractiveness of these potential training sponsors results in a short-list of three candidates, namely

- Sponsor 1: The World Bank
- Sponsor 2: UNDP

The table on the next page illustrates how Business Consult has conducted the comparative analysis, and why the World Bank comes out first on the list.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Sponsor 1</th>
<th>Sponsor 2</th>
<th>Sponsor 3</th>
<th>Comments</th>
</tr>
</thead>
</table>
| Match between their objectives and our training priorities | +         | 0         | +         | World Bank explicitly promotes 
|                                                     |           |           |           | privatization of state enterprises                     |
| Focus on the same target group                      | +         | 0         | +         |                                                       |
| Focus on SME development, particularly with view on training | 0         | +         | 0         |                                                       |
| Funds for training                                  | +         | +         | 0         | WB: Social dimension of adjustment fund 
|                                                     |           |           |           | UNDP: private sector dev. programme                    |
| History of supporting our (training) activities     | 0         | +         | 0         | UNDP sponsored one training seminar 
|                                                     |           |           |           | last year                                             |
| Status of current bi-lateral network relations       | +         | 0         | 0         | Direct contact with WB delegation established 
|                                                     |           |           |           | UNDP contact currently down                           |

For Business Consult, the World Bank is the most attractive partner, since the organization explicitly supports the privatization drive of former state enterprises and recognizes the need to cushion the most affected social groups against the negative impact of structural adjustment. While Business Consult has no history of sponsorship through the World Bank, it has recently managed to establish a direct contact with the organization. Business Consult decides to use this contact to approach the World Bank for financial support.
Exercise 3

Follow the six steps described below to identify a prospective SIYB market segment and a potential training sponsor.

1. Collect information about your target spectrum.
2. Classify the major market segments within your target group spectrum.
3. Compare these market segments and select the most attractive market segment for SIYB training.
4. Collect information about potential training sponsors in your local market.
5. Compare the institutional profiles of these sponsors and select a prospective collaboration partner.
6. When you have identified both your SIYB market segment and the potential SIYB training sponsor, please write the results down in the SIYB Marketing Plan Booklet in the back of this Manual and explain in detail your decision.
4. Develop the SIYB marketing plan

Introduction

Once you have defined the overall objective of SIYB training within your organization, selected a market opportunity for the SIYB training package, chosen a specific market segment of clients and identified a potential training sponsor (where applicable), then you can proceed and map out a marketing plan of how to reach out for your target group.

What is a marketing plan

A marketing plan is a concept paper that outlines the objective, target group, main pillars, implementation strategy and cost implications of your marketing effort.

How to complete your marketing plan

Follow these steps to complete your marketing plan

1. Set the objective of your marketing effort
2. Define the four P’s of marketing
   - Product
   - Place
   - Price
   - Promotion

1. Set the objective of your marketing effort

As the starting point for the development of the marketing plan, you have to define the objective of the marketing effort. The objective of the marketing plan specifies what you want to achieve with your marketing effort.

To define the objective of the marketing plan, you have to refer back to the objective of SIYB training for your organization. You formulated the objective of SIYB training in the first chapter of this manual. Ask yourself the question: How can the marketing effort contribute towards the achievement of the overall objective of training?

The objective of your marketing efforts should be spelled out in a SMART manner, meaning they must be
A SMART objective usually consists of one short sentence that specifies the goal in a clear and specific manner. The aim, here, is to make sure that all people involved in the implementation of the objective related activities can understand what they are supposed to eventually achieve. Avoid listing too many objectives, or worse, mixing various objectives in one sentence. It adds to confusion and might result in an unrealistic and non-achievable objective. Remember, while ambition is a virtue, over-ambition can backfire seriously on your eventual performance.

SMART objectives should quantify or qualify the expected change so that progress and eventual success or failure can be measured along objective criteria. Finally, SMART objectives have to be time-bound, so that one can verify whether progress is towards the achievement of the objective within a set time corridor whether the set goal was eventually achieved as planned.

2. Define the four P’s of marketing

Next, you detail what you want to do to satisfy the needs and wants of your clients with the SIYB training product. To plan and structure your marketing effort, you will typically focus on four issues, often called the four P’s of marketing:

- Product
- Place (Distribution)
- Promotion
- Price.

Product: Adapt SIYB training to the needs of the customer

The product variable refers to activities that you develop to offer the customer a product or service that is needs-based, customized and clearly distinguishable from other products and services.
It is not easy to say whether SIYB training is a service only, because, invariably, services are marketed in conjunction with goods and goods require supporting services. For example, in the case of SIYB, the training service is sold together with a product, here the training materials. Therefore, it is helpful to think of SIYB training as a mix of goods and services located on a continuum ranging from mostly goods to mostly services. On the service-product continuum illustrated below, SIYB training would be classified as mostly service (management skills training) but sold together with a key training product, (the SIYB training materials).

The Service-Product Continuum

The distinction between the training product and the training service is very important from the point of view of a marketeer: First, you have to customize both training service and training materials to the needs and wants of your customers. Then, you can market SIYB training services by using the SIYB training materials as the main selling point to position your offer!

Customizing the training service

As outlined in detail in the SIYB Trainers Guide, the SIYB training interventions are highly flexible by nature: The training interventions have a modular setup and can be delivered, among others, in a compact unit and over a period of five days, or alternatively on evenings one day a week or on weekends. Training can be delivered at many physical locations – in a classroom, in a public meeting place, at the workplace of your clients, or even in their residences.

But caution: Certain limitations and rules apply when customizing the training interventions: Here, the SIYB Trainers Guide is a useful source of reference to decide how to customize the training. You should never compromise on the quality of training e.g. by breaking up individual modules or allocating insufficient time to particular session. Market these quality standards as a set of norms to ensure maximum training impact.

Customizing the training product

ILO has come a long way in assisting you to offer a truly needs-based training product in the form of the SIYB training materials. The design of the SIYB training materials was, in fact, based on a thorough needs-analysis of the target group spectrum.
The ILO, furthermore, constantly monitors the relevance of the SIYB programme for small-scale entrepreneurs; the results are fed into the development of new, and the adjustment of existing, training materials.

However, the SIYB training materials are standardized. This is necessary to ensure its relevance to a wide target group spectrum in developing countries all over the world. The ILO welcomes the adaptation of the training materials to your local situation. It is your task to adapt these training materials to the specific needs of your target segment while ensuring that the quality standards of the overall training package are not compromised.

The SIYB training materials can be customized in many ways and along its various tangible and intangible attributes. Typically, the following attributes are distinguished:

**Attributes of the SIYB training product**

![Diagram showing various attributes of the SIYB training product]

Again: Certain limitations and rules apply when customizing the training materials: The SIYB Trainers Guide will help you to decide how to customize the training materials. In case of doubt, you can always contact the local SIYB project office. The office has a department for training programme and material development and will counsel you, on request.

The SIYB project office might also provide you with a copy of one of the numerous adaptations of the training materials that already exist, i.e the IYB training package for construction businesses and an SYB training package for non-motorized rural transport. Furthermore, the SIYB project office might put you in touch with other SIYB training providers facing a similar task and eager to share their experience in and the costs of the material adaptation.
Positioning your training offer

You have to pay special attention to giving the SIYB training package clearly distinguishable characteristics and/or to develop an image projected in relation to competitive products or your organizations’ other products. The process is called positioning. The aim of positioning, here, is to allow the customers a clear choice between different products and services offered by your organization and by your competitors and to enable them to choose the product or service he or she can benefit from most.

As indicated above, positioning of the SIYB training package has two dimensions: It refers both to the process of

- integrating the package into the product mix (the overall range of products) and the product line (the range of products with similar uses and characteristics offered by your organization)
- placing the package in relation to competitive products on the market.

Positioning strategies often applied by partner organizations are

- Positioning in relation to a competitor. Positioning in relation to a competitor means to market the SIYB training package as superior to competitive products. Head-to-head positioning (as this approach is also called) is not always the option to choose, especially when the competitor has a strong market position. Here, it is often preferable to stress the complimentary nature of products and to accentuate gradual differences
- Positioning in relation to a product class or attribute. This approach relies on associating (or distancing) the SIYB training package with a particular product class or attribute. For example, a typical attribute often used by partner organizations to associate the SIYB training package with is the label “developed by the International Labour Organization”.

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Business Consult studies the profile of the chosen market segment and concludes that the training beneficiaries:

- need a short high-intensive training course with clear output orientation (enabling participants to start their own business), preferably in the evening or on weekends since all of them are still working for the mining company
- want cost-effective training, rather compromising on training venue and food, but not contents.

Business Consult also analyzes the institutional profile of the prospective training sponsor and concludes that the World Bank will want:

- a detailed project document explaining what Business Consult plans to do and how it would relate to the World Bank’s programme objectives and target groups
- transparent accounting procedures
- a concise approach to monitoring and evaluation
- cost-effective training.
Looking at the list of needs and wants of both the intended training beneficiaries and the prospective training sponsors, Business Consult opts for a flexible and customized training programme. Business Consult plans to offer a full 40-hour business start-up training course but spread over three consecutive weekends, plus a one weekend follow-up seminar about two months after the initial training intervention.

**Place (Distribution): Reach your target market**

The distribution variable relates to what you as an SIYB training provider do to make the SIYB training package available in the quantities desired to as many clients as possible while keeping the distribution costs down.\(^6\)

As a (training) service provider, direct contact with your clients is of great importance for you. To maintain direct contact, your clients might either come to your office or you might go to your clients, or both. The larger part of your potential clients will not have the mobility and flexibility (and the resources) to easily come to your place for technical assistance. Therefore, it will usually be your task to go into the field to deliver your training services; sometimes, you might meet halfway, i.e. in a training centre.

The fact that, in most cases, you have to go to your clients to deliver your training services has clear cost implications. If you do not restrict yourself to your immediate local environment but want to focus on target segments in different locations you have to allocate time and money for travelling, food and accommodation. Also, you have to consider the opportunity costs; you are far away from your own office and can not attend to other duties.

The main challenge, therefore, will be to organize your distribution system in a way that allows you to save on costs while, at the same time, maximizes your physical outreach.

These two goals are not easy to match:

- Some SIYB training providers maintain a cost-intensive network of provincial delegations to be as close as possible to their clients. In many cases, these provincial delegations have an SIYB trainer on their payroll and often these human resources are under-utilized. The trainers are often left alone and lack financial and logistical back-up from headquarters.
- Other SIYB training providers have opted to only maintain one main office. The training staff are located in that office and travel to the training venue to deliver the training services, if and when the need arises. While that approach saves significantly on the fixed costs, these organizations tend to be physically under-represented in potentially lucrative provincial markets. Also, any training course in the provinces requires a major logistical effort and the short-term costs of sending a trainer from the capital might inflate the budget.

\(^6\) The IYB Basics Manual about Marketing describes in detail the different distribution channels for all types of businesses.
To match both goals, cost effectiveness and direct customer contact, you as an SIYB trainer or training coordinator might consider:

- seeking logistical synergy effects with other SIYB training providers by jointly organizing training. The one training provider brings in the network of provincial delegations to stay in close contact with the clients and offer customized follow-up after training. The other training provider brings in a second trainer for the training course and provides logistical back-up; income from training is shared according to costs incurred and type of services provided.
- flexibilizing distribution channels, for example by organizing “training on wheels”, in public places or where the clients live and work (i.e. close to digging sites if your train small-scale miners).
- opening up un-conventional distribution channels, i.e. by transmitting SIYB training sessions over the radio.
- focusing on non-traditional distribution channels, i.e. by developing an interactive SIYB training CD for mass-production.
- “piggy-backing” on the distribution channels set up by other types of Business Development Services providers, i.e. linking up to training courses offered by vocational training centers, or counseling sessions provided by credit institutions to their clients after loan disbursement.

You are encouraged to be creative and use your network with other SIYB training providers to flexibly respond to the changing distribution requirements of your varying market segments. Consider the other SIYB training providers not only as competitors but as a potential resource to tap for the benefit of all parties, the training providers and the target group in the field.

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**Business Consult knows that it lacks the field staff to individually follow up on the seminar participants after training. Therefore, Business Consult decides to hire local SIYB trainers from another SIYB training provider. These local SIYB trainers will be sub-contracted by Business Consult to conduct the follow-up activities.**

**Both sides profit in the process: Business Consult is able to expand its training distribution network and the other SIYB Partner Organization makes better use of its existing training capacity. In fact, Business Consult even makes a small profit in the process, since it charges the training sponsor the equivalent of 50 US Dollars per work-day but only pays out the equivalent of 40 US Dollars to the sub-contracted SIYB trainers.**

**To be as close as possible to their clients, Business Consult decides to approach the mining company to use their in-house conference room as a training venue. The mining company agrees to rent out the conference for 30 US Dollars a day. The costs for the training venue are listed as a separate item on, and recovered through, the training budget.**
Promotion: Get your message across

The promotion variable comprises everything you do to inform selected target groups about the SIYB training package and to attract them to exchange their money for your training services. The major focus of promotion is on communication among the parties involved in the market exchange.

Communication, in the context of promoting SIYB training, relates to an exchange of information between you, the SIYB training provider, and the training beneficiaries and the training sponsor.

A number of conditions apply for successful communication to take place between you and your customers and a training sponsor. A major determinant of successful communication (actually a pre-condition) is that both the sender and the receiver are willing to communicate. The willingness to communicate is usually determined by the expectation of benefit, i.e. the hope to satisfy a want or to solve a particular problem. Remember, your customer market segment(s) of choice should be able to fully benefit from, and have at least a latent demand for, SIYB training. Also, your training sponsor of choice should be generally open to the idea of subsidizing SIYB training because doing so is consistent with its policy guidelines and funding criteria. Accordingly, and if you have done your market segmentation properly, both parties should be generally willing to receive your promotional message – provided it is coded correctly, “wrapped” nicely and delivered through appropriate channels or media (see below).

Other elements determining successful communication are the communication channels or media chosen and the communication code selected by the sender of the message. In addition, the “noise” or interference with other promotional messages sent by the sender or its competitors, has to be kept at sustainable levels. The elements in the communication process are illustrated and further described below:

Elements in the Communication Process

A communication channel is any media used to transport your promotional message. You are well advised to use different media for customers and training sponsors:

- Small-scale entrepreneurs are best reached either through a mass media like radio or, alternatively, through a personal selling effort, i.e. by means of a promotional workshop, or during a fair or exhibition). In both cases, you will aim to reach them in the place where they live and work.

- Training sponsors usually have access to computer e-mail, telephone, fax and mail. In most cases, they are closely linked to the information network within the urban sector. Training sponsors interact during meetings, workshops, and conferences. If you want to communicate with training sponsors you might opt for direct mailing or personal selling. The focus of your efforts will always be on bi-lateral contacts.

The communication code is the language that you use to formulate your message. Training sponsors and entrepreneurs use different language codes to communicate:

- Small-scale entrepreneurs are usually not receptive to a long and complicated message. In most cases, their prime interest in listening to your message is to find out whether and how they can approach training at affordable rates, in the shortest period of time, yet rendering maximum training impact. They might simply not wish to know about the institutional set-up of the programme and how you measure training impact. Therefore, your message has to be short and clear.

- Training sponsors can usually be expected to want detailed background information. While they support the idea of training for small-scale entrepreneurs, they usually also want to know more details about the programme. They will expect you to cluster the information around certain concepts, follow a certain logic and use a particular terminology. If you want to communicate with potential sponsors about the SIYB training package, and convince them to subsidize training, you will have to know a number of these concepts and use the relevant terminology. Some of these concepts and aligned terminology are:

  - **Sustainability**: How does your organization plan to maintain the training programme once sponsor support has phased out? Will the training beneficiary contribute to the costs of training?
  - **Cost-effectiveness**: Is SIYB training cost-efficient compared to other programme (e.g. costs per participant, costs per job created)?
  - **Training impact**: Does SIYB training have a significant impact? Is the impact documented?
  - Poverty alleviation: Does your training programme contribute to the alleviation of poverty?
  - **Gender sensitivity**: Does the training programme balance the specific needs of both genders?
  - **Environment and development**: Does the training programme emphasize the aspect of conservation of the environment and sustainable economic development?
  - **Peace and stability**: Does the intended training intervention contribute to a more stable and peaceful environment
  - **Project vs. Programme**: Is your proposed training course isolated or is it part of an integrated development programme? Does it come in a package with other components like technical skill training and access to finance?
The noise refers to the interference of other promotional messages with your own message. If the noise level is high (read: if your senders receive many interfering promotional messages), the attention of your customers is likely to be distracted. As a result, they might not comprehend the contents of your own message, or, they might not be induced to respond to it. To maintain the noise level at sustainable levels, carefully plan the point in time when to deliver your message, and avoid targeting customer segments that are too heavily competed for, or actually dominated, by other service providers.

Finally, another factor often determining successful communication are the communication tools or “packaging” or “wrapping” for the promotional message. Small entrepreneurs and training sponsors have different preferences for communication tools:

- Small-scale entrepreneurs often are more susceptible to information that is wrapped up in a simple, colourful and highly suggestive manner, i.e. in a poster or an illustrated brochure. You run the risk of technological overkill if you use too sophisticated communication tools to get your message across.
- Training sponsors often make use of, and expect others to make use of more sophisticated means of wrapping information, i.e. with overhead transparencies or with a multi-media presentations. To increase the impact on your audience, you might want to adapt to these standards.

To assist you in the process of communicating with the training beneficiaries and the training sponsors, your local SIYB project office you a wide range of customized communication tools and opens various communication channels, on request.

You can choose from the following communication tools:

- SIYB promotional flyers targeting small-scale entrepreneurs
- SIYB posters targeting small-scale entrepreneurs
- SIYB flyers targeting organizations (e.g. training sponsors)
- SIYB Bulletin targeting organizations and trainers
- SIYB presentation package with colour transparencies targeting entrepreneurs, training sponsors and other organizations.

Your local SIYB project office offers you to customize these tools to the needs of your organization by working out tailor-made layouts, personalized contents and by programming them with an appropriate communication code.

The same project office, on request, facilitates access to the following communication channels:

- Promotional workshops. Promotional workshops are major events jointly organized by the SIYB Regional Project Office and local Partner Organizations. They are meant to promote the services of these Partner Organizations to the local small enterprise support community.
- Information stands at fairs and exhibitions. The SIYB project office sets up information stands at fairs and exhibitions to promote the SIYB programme. You are invited to man these stands and represent the local community of SIYB Partner Organizations.
- Bilateral meetings with potential sponsors. Under certain circumstances, the SIYB project office facilitates contacts with potential training sponsors.
In some SIYB country projects, the local SIYB project office has also been involved in the design of radio shows and provided access to other mass media.

Looking at the range of promotional tools and activities available, you might be tempted to plan for a whole bonfire of marketing events. Be careful, promotion comes at a cost, notwithstanding the technical support from the SIYB project office. You will have to calculate your inputs for promotion carefully and recover them at a later stage through your training budget.

### How Business Consult does it

**Business Consult, after thorough analysis of the cost implications of the various promotional efforts, decides on the following strategy:**

- **The intended training beneficiaries will be targeted with promotional workshops.** For that purpose, Business Consult liaises with the management of the mining company to organize the promotional events *during* working hours – assuming that the company would support such an initiative as one way of encouraging a pro-active approach of their employees to upcoming retrenchment. The objective of the workshop is to attract the interest of the potential clients in the SYB package and to establish a direct contact with them. During the workshop, Business Consult plans to circulate a name list, asking all participants with further interest in the programme to fill in their contact address. After the workshop, Business Consult plans to follow up these participants individually.

- **The prospective training sponsor will be approached through bi-lateral talks.** For that purpose, Business Consult plans to approach its contact in the local World Bank delegation and seek an individual meeting with the officer in charge of Small Enterprise Development. On the occasion of that meeting, Business Consult plans to introduce its organizational objectives, target groups and the programmatic focus and then to present a draft project proposal, together with a detailed budget. Two weeks after the meeting, Business Consult plans to follow up in writing on its proposal.

Business Consult makes use of the following promotional tools: SIYB posters and flyers, the SIYB programme presentation package with colour transparencies during the workshop and a promotional flyer about Business Consult. To carry out the planned promotional activities, Business Consult budgets for the following costs: The equivalent of

- 100 US Dollars for two half-day promotional workshops for retrenchees on the business premises of the mining company.
- 50 US Dollars for the critical meeting with the prospective training sponsor
- 100 US Dollars on the printing and distribution of promotional materials
- 100 US Dollars for follow-up both on the training beneficiaries and the training sponsors (mailing campaign, telephone and fax, follow-up visits).

Business Consult plans to recover the total costs of 350 US Dollars for promotion through the training budget. Expenses for promotion will be factored into the overhead costs of the company and charged to the customers (see below).
Price: Set the price right for SIYB training

The price variable relates to activities associated with establishing SIYB pricing policies and determining a price for the training package. Most companies establish their prices using one of the following methods:

- Prices are based on total cost plus a desired profit
- Prices are based on marginal analysis – a consideration of both market demand and supply
- Prices are based only on competitive market condition.

Translated into the environment of an SIYB partner organization, you will usually calculate the price for the SIYB training package by looking at three factors:

- the total costs of SIYB training or lower ceiling of the selling price: The selling price for training should not be lower than the total costs of providing the service (exceptions from this rule apply, though. see below under pricing strategies)
- the price your clients and the training sponsors are willing to pay; the price your clients and the training sponsor are willing to pay marks the upper ceiling of the selling price
- the price charged by your competitors; in a market economy, the prices charged by your competitors (should) act as a market corrective likely to force you to eventually settle your final selling price somewhere in between the lower and higher ceiling of the price range

To calculate the total costs of SIYB training, you have to factor in all costs you incur when setting up and running a training course and related follow-up activities. These costs include:

- salaries for trainers
- training materials
- costs related to the training facility, hire charge for the room, OHP, electricity
- food (and accommodation) for participants, e.g. lunch, tea, coffee and snacks, water
- stationery, like pencils, pens, flip chart paper, notepads, copies and others
- communication, e.g. telephone, fax
- contingency costs or provisions for unexpected expenses (e.g. for emergency transport). Usually, contingency costs are budgeted with a small flat fee
- overhead costs which are a small portion of total operational costs of your organization. Through charging for overheads, you aim to recover a fraction of these costs through each and every training activity. Operational costs are incurred, among others, for:
  - office rent
  - energy
  - communication
  - insurance
  - marketing of the training product.
Business Consult lists all cost items related to the planned training course and quantifies these items. Having quantified all costs, Business Consult adds a 5% profit margin. The profit margin is not expressed as a separate item, but included in the trainer fees.

From the outset, Business Consult plans for a scenario where the sponsor negotiates cuts in the draft budget. To accommodate for these cuts, Business Consult adds a small extra to each cost item. Business Consult makes sure that the total costs of training do not (largely) exceed the price charged by the competitors in the market. The draft budget of Business Consult for a non-residential five-day seminar and related follow-up activities is illustrated on the next page.

All items are quoted in US$. Business Consult plans for 15 participants. All participants are expected to meet their own transport costs to and from the venue. The overhead costs include, among others, all expenses incurred by Business Consult for marketing activities related to promotion. Business Consult recovers part of the total promotion costs of 360 US Dollars with each seminar conducted.

1. Trainer fees
   1.1. One trainer @ 50 US $ per day for 8 hours (or one day) to conduct selection interviews and Training Needs Analysis 50.00
   1.2. Two trainers @ 50US $ per person per day for 40 hours each (or five days) to conduct an SYB TOPE seminar 500.00
   1.3. One trainer @50 US $ per day for 16 hours (or two days) to conduct SYB follow-up interventions 100.00

2. Training materials
   2.1. 15 SYB material kits @4 US $ each 60.00

3. Training room
   3.1 Boardroom hire for 56 hours (or seven days) @ 25 US $ per day 175.00

4. Food
   4.1. Tea and lunch for participants @ 1 US $ per participant For two tea breaks a day) and 3.5 US $ per participant per lunch per day for seven days 210 315.00
   4.2. Soft drinks @ 0.50 Cents each for 15 participants for seven days 52.50
   4.3. Bottled water and sweets for 15 participants for seven days @40 US $ flat fee 40.00

5. Stationery, Copies
   5.1. Pens and Pencils, Notepads, Flip chart paper, Transparencies, photocopies and other @ 70 US $ flat fee 70.00

6. Communication
   6.1. Telephone, fax @ 20 US $ flat fee 20.00

7. Contingency costs
   7.1. Provisions @ 100 US $ flat fee 100.00

8. Overheads
   8.1. Overheads at 5% of total costs 74.123

Total costs: 1558.13*

*excluding NSL and applicable government taxes
How much your customers are willing to pay depends on two factors:

- The total income of your customers, and – out of that – the “disposable” income that they might spend for training. The market segment profile will provide you with the baseline information to estimate roughly how much your customers earn and how much many they might have left a the end of the months to spend for non-essential commodities like a training service.

- The overall appreciation of the value of a training service in the mind of your customers. The ability to spend money for training is not to be confused with the willingness to actually do so; customers have many choice how to spend their money and training is often not considered the most desirable option because the immediate benefit of the service is intangible. In fact, and not at least due to the distortion of the training market with subsidies, customers often do not appreciate the real value of a training service and basically expect to access it for free or almost for free. That consumer attitude complicates any pricing strategy significantly.

How much a training sponsor is willing to contribute is mainly a function of its budget allocation for training. While it is often very difficult to seek reliable information about the training funds of a potential sponsor in the current budget year, you might extrapolate the amount by studying the resource allocation in the last two or three budget years. Figures about these past budget allocations are published in the annual reports. The figures indicate the consumption power of your market segment and training sponsor. If the prospective training sponsor has subsidized your training programmes in the past, you might take these annual allocations as a starting point.

To find out how much your competitors charge for their business start-up seminars, you will have to collect information from your local market. For that purpose, you might study their official price lists or inquire informally through your network in the development support community. It is very important to have a idea about the price structure of your competitors. Knowing these prices can give you a differential advantage during the bidding process for a training tender.

Knowing your total input costs, the price your customers and the training sponsors are willing to pay and the price your competitors enables you calculate a realistic and financially sustainable selling price. Whether or not you actually use this figure to fix your final price tag for training, is largely a question of your pricing strategy, though.

A whole range of pricing strategies are known to marketers to penetrate new market segments or consolidate and expand their existing market share for a given product or service. Not all of these pricing strategies are relevant for SIYB partner organizations. For instance, market skimming might usually not be viable pricing strategy for a training service. However, some other pricing strategies provide SIYB partner organizations with realistic options to differentiate their services from competitors and to attract customer attention.

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7 Market skimming is to set a relatively high initial price for a new product or service. The price is set at the highest possible level that the most interested customers will pay for the new product or service
Three pricing strategies with potential for SIYB partner organizations are:

- Discounts. Discounts result in a deduction from the base (or list) price for training. Various types of discounts are known, but the type of discount most often used by partner organizations is the quantity discount. Quantity discounts are usually based on the size of the purchase of a service or product, either in monetary terms or in unit numbers.
- Flexible pricing. Under a flexible pricing strategy, similar customers pay different prices when buying identical quantities of a product.
- Non-price competition. In non-price competition, seller maintain stable prices and attempt to improve their market position by means of product differentiation, promotional activities or other techniques.

Business Consult decides to provide the potential training sponsor with an additional incentive to fund business start-up training for retrenches. The company offers a five percent quantity discount provided the World Bank agrees to fund more than 10 SYB seminars in one round.

Please follow the four steps described below to set the four P’s of your marketing plan:

1. Look at the profile of your chosen market segment and the institutional profile of your potential training sponsor and assess the needs and wants of your target groups. Where feasible, adapt the SIYB training product to these needs and wants.
2. Calculate all your input costs for SIYB training and draft a budget for training and related follow-up activities. Estimate how much your clients and the training sponsor are able and willing to pay and find out how much your competitors charge for a similar training product. Based on these information sources, tentatively fix a price for your training services.
3. Establish the distribution channels for your SIYB training services.
4. Choose the communication channels and tools to promote the SIYB training product to training beneficiaries and training sponsors alike. Make sure you use the appropriate language codes to make yourself understood.
5. Mix the four P’s of your SIYB marketing effort, based on a cost-benefit analysis.
6. Once you have decided about your marketing mix, please write the results down in the SIYB marketing plan in the back of this manual. Explain why you made that choice.
5. Manage the Marketing Effort

Introduction

Once you have completed the design of your marketing plan you might be tempted to immediately proceed towards its implementation. Such a quick move carries a number of severe risks:

- Disorientation in the implementation process due to lack of clearly defined outputs and activities. While you have mapped out the objective and the major coordinates of your marketing plan, you still have to translate it into a set of concrete outputs and activities. Otherwise you will wonder where to start and what to do next.

- Ineffectiveness due to lack of time management. Defining a set of activities and outputs is one thing, putting them in a chronological order is another. Without a precise time-schedule you might be carried away by the events and merely react to them rather than set their course. Also, you are not able to check on the progress of implementation or to detect delays in time.

- No final measurement of success due to lack of indicators of achievement. While you have defined the broad goal of your strategy you have still not fixed precisely when you consider its objective to be successfully achieved. Successful achievement of your marketing strategy objective is not equivalent to successful completion of all planned activities.

Managing the marketing effort means controlling risks through a number of simple management techniques. The last chapter of this Manual will familiarize you with a small selection of these management techniques and assist you in applying them to your own SIYB Marketing strategy. The following techniques will be discussed:

- How to translate your marketing plan into concrete outputs and activities
- How to set up a time-table – and how to use it to control progress
- How to measure success of your marketing plan with Indicators of Achievement.

How to translate your plan into concrete outputs and activities

Look at your draft marketing plan, particularly at the four P’s of marketing. You have probably written down a number of things that you plan to do to market the SIYB training package to your clients and a potential training sponsor.
Every individual item on your to-do-list is considered an activity. An activity is a planned move you undertake to achieve a clearly defined output. For instance

- you might plan to customize an SIYB training session particularly to the needs of your specific market segment. The activity would be to sit down and amend the SIYB training session according to the training needs of the target group; the output of the activity is a customized SIYB training package for your future clients.
- you plan to conduct a half-day SIYB promotion workshop for potential training sponsors: the activity is to carry out a workshop for potential training sponsors. The expected output at the end of the workshop would be that you have successfully established linkages to potential training sponsors and eventually enter into collaboration with one of them.

To formulate your marketing activities, and the expected outputs of these activities, you first look at the marketing objective. What do you want to achieve with your marketing plan? The outputs of your marketing plan are a function of the marketing objective. Each output contributes to its achievement. The marketing activities, in turn, are conducted with the expectation of resulting in the specified outputs. The correlation between objectives, outputs and activities is highlighted in the illustration below.

**The correlation between marketing objective, outputs and activities**

![Diagram showing the correlation between objective, outputs, and activities.](attachment:diagram.png)

The following ground-rules facilitate the formulation of your activities and outputs:

- Outputs and activities should be short, measurable, achievable and realistic. Use only one sentence to describe each activity and output and do not be over-ambitious in your goals; it is you who is likely to suffer the pressure exerted from these goals during the implementation phase.
- The total number of activities you conduct during your marketing effort is a function of the number of outputs you need to have in place to achieve your marketing objective. Also, the number of activities you conduct to achieve one specific output varies from case to case. As a basic rule a specific output will take you more than one activity to be successfully completed and the number of activities is likely to increase with the grade of complexity of a specific output.
- To formulate an output, you always make use of the past tense, because outputs are the expected end result of one or several activities. You write: “The SIYB training product has been customized to the training needs of the target group.”
- To formulate an activity, you always make use of the present tense. You write: “A joint task force of SIYB trainers is formed to review the SIYB training product.”

It helps a lot if you visualize your planned outputs and their related activities in an organizational chart. To further structure your thoughts, group your planned outputs according to the four P’s of marketing.

To translate its planned marketing effort into concrete outputs and activities, Business Consult refers back to original objective of their marketing plan. The objective of their marketing plan reads as follows: “The objective of the marketing effort is to satisfy the needs of retrenchees for a business start-up training product.” Then, Business Consult prepares an organizational chart of outputs and related activities to achieve that objectives. The chart is reproduced below.

<table>
<thead>
<tr>
<th>How Business Consult does it</th>
<th>PRODUCT</th>
<th>PLACE</th>
<th>PROMOTION</th>
<th>PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>To satisfy the needs of retrenchees for a business start-up training product</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>The training product has been customized</td>
<td>Needs-based distribution channels have been established</td>
<td>The target group is committed to use the training product</td>
<td>The price of the training product is acceptable to all parties</td>
</tr>
<tr>
<td></td>
<td>A task force of SIYB trainers reviews the training product</td>
<td>Agreement with mining company sought to train retrenchees on the premises</td>
<td>A half-day SIYB promotional workshop is carried out for retrenchees</td>
<td>Both training sponsors and beneficiaries are individually followed-up</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other SIYB trainers are sub-contracted to conduct follow-up after training</td>
<td>A product introduction meeting is conducted for the training sponsor</td>
<td>The total input costs are assessed</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>A budget proposal is negotiated with the training sponsor</td>
</tr>
</tbody>
</table>

The price of the training product is acceptable to all parties
**How to set up a timetable - and how to use it to control progress**

A timetable is a list of outputs and activities that have been grouped in chronological order. Each output and each activity is assigned an exact starting point and an exact cut-off point in time.

The idea behind a timetable is to enable the coordinator of the marketing effort to know which activities to conduct at what time and what to do next. It puts him or her in a position to plan ahead in time, to anticipate phases of peak activity, and to allocate financial and human resources accordingly.

Furthermore, a timetable is like an early-warning system. It tells you if you are about to miss a deadline for a planned output. Read more about the early-warning function of the timetable on the next page (how to control progress).

With all the good things said about a timetable, you also have to be aware of its likely side-effects:

- A timetable enforces a fixed schedule on you. Once you have defined the chronological order of your activities and outputs, it will be difficult to change their configuration; doing so might upset the whole structure.
- A timetable makes your implementation strategy transparent to others. Everybody will have a clear idea what you want to achieve by when. Thus, others might use the time plan as a control tool. If you fall behind your own schedule, you can not hide but will have to explain the reasons.

Both side effects are likely to result in pressure, and pressure is exactly what you wanted to avoid by designing the timetable. What can you do to off-set the side-effects of transparent time-management?

To avoid pressure building up, think twice before you set over-ambitious deadlines. While it is tempting to impress your superiors with speedy strategy implementation, it is better to come up with a conservative estimate of the time needed to complete an activity. Plan for a time-reserve to catch up when something goes wrong. Nobody will criticize you if you complete an activity *before* time.

---

**Business Consult lists the outputs, and the related activities, and defines a starting-point and a cut-off date for each of them.**

**Their timetable is illustrated on the next page.**
The timetable of the Business Consult marketing plan

<table>
<thead>
<tr>
<th>Outputs and Activities</th>
<th>Year: 1999</th>
</tr>
</thead>
</table>

### Output 1: The training product has been customized

- **A 1.1:** A task force of SIYB trainers review the training product
- **A 1.2:** The reviewed training product is pilot-tested and finalized

### Output 2 Needs-based distribution channels have been established

- **A 2.1:** Agreement with mining company is sought to train retrenchees on the premises after work-hours
- **A 2.2:** Other SIYB trainers are sub-contracted to conduct follow-up after training

### Output 3: The target group is committed to use the training product

- **A 3.1:** A half-day SIYB promotional workshop is carried out for retrenchees
- **A 3.2:** The training beneficiaries are individually followed-up

### Output 4: The prospective training sponsor has agreed to subsidize training

- **A 4.1:** A product introduction meeting is conducted for the prospective training sponsor conducted for TG
- **A 4.2:** The prospective training sponsor is followed-up after the meeting

### Output 5: The price of the training product is acceptable to all parties

- **A 5.1:** The total input costs are assessed
- **A 5.2:** A budget proposal is drafted and negotiated with the training sponsor

Use the timetable to control progress in the implementation of your SIYB marketing effort. Looking at the timetable, you are able to check if you are on track with the implementation of your SIYB Marketing Strategy. You just have to compare the activities that you *should* have conducted with your actual track record. You will know that you have fallen behind schedule if one or several deadlines for your projected activities have not been met. Failing to meet a deadline does not automatically mean that the success of your Marketing Strategy is threatened; it is an indicator, however, that you are deviating from the “ideal” implementation path and might have to undertake corrective action.
Corrective action to steer the implementation process of your SIYB marketing plan back on track is one option. Alternatively, and preferably, you might want to undertake preventive measures to avoid any deviation from the ideal implementation path. To that purpose, you can again refer to your timetable – just transform it into an early-warning system. To do so, you stick it to the wall of your office and check it at regular intervals. Keep a careful eye on the deadlines for your activities as they approach in time. You will soon know in which activity implementation is not going smoothly. It is here, where you are likely to develop a time problem. You have detected the challenge in time and can tackle it through preventive measures. You might, for instance, consider allocating more time and more money to that activity area.

**How to measure success of your marketing effort with Indicators of Achievement**

To measure the success (or failure) of your SIYB marketing plan, you can make use of a simple management tool: the so-called Indicators of Achievement. Indicators are used to measure the state of something or somebody at a given point in time. For instance, you can measure a situation of poverty of an individual by measuring it against the indicator “household income”. The indicator alone will not tell you if the individual is poor or not; it only quantifies the availability of something that is deemed necessary for individual wealth. It needs the indicator and a cut-off point on its measurement scale to specify a state of individual poverty; below that cut-off point the individual is considered poor; above that line he or she is considered not poor.

You will find indicators very useful in cases when the state of something or somebody escapes easy quantification. Coming back to the example of poverty: Everybody knows that poverty exists, but it is difficult to say what it looks like. To measure success or failure of your own SIYB Marketing Strategy is almost as difficult as measuring a situation of poverty. Success is an abstract category and often people have different perceptions of it. Even more difficult is specifying the cut-off point for success. When exactly do you consider it achieved?

The quantification (or qualification) of the success of your SIYB marketing effort with one or several Indicators of Achievement will entirely depend on the objective of the strategy: What did you want to achieve when you started off?

Taking the objective of your marketing plan you have to try to find a quantifiable or measurable term to provide verifiable evidence of progress made towards the achievement of this objective, and you have to define the cut-off point at which you consider it successfully achieved.

Different types of SIYB Partner Organizations will use different types of Indicators of Achievement. For instance, if you are working for a non-profit making organization focusing on under-privileged social groups, you might not consider a profit margin to be a valuable Indicator of Achievement.
The basic concept of measuring the success of your marketing effort remains valid, though. The Indicators of Achievement are proof to the outside world that your strategy actually has made a difference, resulting in a change to the positive for your own organization and your clients.

<table>
<thead>
<tr>
<th>Indicator of Achievement</th>
<th>Cut-off point for success</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of clients registering for SYB training</td>
<td>100 clients registering</td>
</tr>
<tr>
<td>Contract volume signed by training sponsor</td>
<td>Above 12 000 US $ (equiv. to six seminars)</td>
</tr>
<tr>
<td>Net profit generated</td>
<td>1200 US Dollars (or 10% of the total contract volume)</td>
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</tbody>
</table>

Now that you have been introduced to the basic management instruments, set them up systematically for the purposes of your own SIYB marketing plan. Follow these steps:

1. Refer back to your draft SIYB marketing plan. Looking at the objective of your marketing plan, and the planned marketing effort for each P of marketing, formulate a list of activities you plan to conduct and the outputs these activities are supposed to result in.
2. Put the activities and outputs on your list in a chronological order and define deadlines for their completion.
3. Define a set of core Indicators of Achievements.
4. Copy the draft timetable and the Indicators of Achievement into the SIYB Marketing Plan Booklet in the back of this Manual.
ANNEX
OBJECTIVE OF SIYB TRAINING FOR MY ORGANIZATION

The overall objective of the SIYB training programme run by my organization is to:

MARKET OPPORTUNITY FOR MY ORGANIZATION

The local market offers the following opportunity for SIYB training:
SIYB TARGET MARKET FOR MY ORGANIZATION

The following market segment(-s) will be targeted with SIYB training:

Reason:

THE PROSPECTIVE TRAINING SPONSOR

The following training sponsor will be approached:

Reason:
OBJECTIVE OF THE MARKETING EFFORT

The objective of the marketing effort is to:

THE FOUR P’s OF MARKETING

PRODUCT

The SIYB training product will be adapted as follows:

Reason:

Cost implications:
PLACE

The following distribution system will be set up:

Reason:

Cost implications

PROMOTION

The SIYB training product will be promoted as follows:

Continued on next page
Reason:

Cost implications

Resultant total costs for marketing mix
(product + place + promotion) = ___________________
The SIYB training product will be priced as follows:
INDICATORS OF ACHIEVEMENT

The following Indicators of Achievement will be used to measure the success of the marketing plan:

Reason:
## Timetable

### Outputs and Activities

<table>
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<th>YEAR:</th>
<th>JAN</th>
<th>FEB</th>
<th>MARCH</th>
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