

# Exhale Initiative Marketing Plan Development



Prepared by Crowley Webb



# Nice to meet you!



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## Crowley Webb 101

125 communications professionals.

Partners with Exhale since 2021.

Brand experts.

Generalists, not specialists.

Local and national experience.

Fully integrated.





# exhale

THE FAMILY  
CAREGIVER INITIATIVE



In 2020, the National Alliance for Caregiving estimated there were **53 MILLION INDIVIDUALS** in the US caring for a parent, spouse, or loved one! These family members watching over older adults play a vital role in our communities, health system, and workforce. However, their duty comes at a cost.



Family caregivers are at a higher risk for stress, depression, and money problems<sup>2</sup> – a situation that's only been exacerbated by the COVID-19 pandemic.<sup>3</sup> And with 61% of caregivers holding down jobs outside the home,<sup>4</sup> it's very likely that many of your employees are carrying this extra responsibility in addition to their work.

### **We're here to help.**

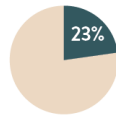
Relief or respite care can play a key role in reinforcing caregiver well-being. In fact, simply knowing respite services are available can lower caregiver stress by 70%.<sup>5</sup> But caregivers need support to find time to rest, clear their minds, take a breath, and take care of their own health and well-being.

### **INTRODUCING EXHALE.**

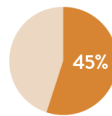
November is National Family Caregivers Month, and in recognition of this milestone we are proud to launch Exhale, the Family Caregiver Initiative. Exhale is an opportunity for businesses and organizations to work together to find innovative solutions that give caregivers an opportunity to breathe a little easier. In a short series of virtual workshops, those interested in developing an innovative respite initiative will receive free training in creative problem solving and project management, as well as a stipend of \$500 for participation and a chance to explore this opportunity for further funding.



In 2020, the National Alliance for Caregiving estimated there were **53 MILLION INDIVIDUALS** in the US caring for a parent, spouse, or loved one<sup>1</sup>. These family members watching over older adults play a vital role in our communities, health system, and workforce. However, their duty comes at a cost.



CAREGIVERS WITH  
HEALTH IMPACTS



CAREGIVERS WITH  
FINANCIAL IMPACTS

With 23% of the US reporting that caregiving has made their own health worse and 45% citing negative financial impact<sup>1</sup>, it's no surprise that family caregivers are at higher risk for stress, depression, and money problems<sup>2</sup> – a situation that's only been exacerbated by the COVID-19 pandemic.<sup>3</sup>

## We're here to help.

Relief or respite care can improve caregiver well-being and effectiveness, leading to better health, better social-emotional outcomes, and even lower costs of care.<sup>4</sup> But caregivers need support to find time to rest, clear their minds, take a breath, and take care of their own health and well-being.

Simply knowing respite  
services are available  
can lower caregiver  
stress by

70%



ExhaleForCaregivers.org

Source: [archangel.me/night](https://archangel.me/night)

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61%

of US caregivers  
have jobs outside  
their care  
responsibilities



ExhaleForCaregivers.org

Source: [aarp.org/content/dam/aarp/research/public\\_policy\\_institute/ltc/2012/understanding-impact-family-caregiving-work-AARP-ppi-ltc.pdf](https://aarp.org/content/dam/aarp/research/public_policy_institute/ltc/2012/understanding-impact-family-caregiving-work-AARP-ppi-ltc.pdf)

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69%

of US caregivers  
have no paid help  
in caring for their  
loved one



ExhaleForCaregivers.org

Source: [aarp.org/content/dam/aarp/ppi/2020/05/full-report-caregiving-in-the-united-states.doi10.26419-2f9pp.00103.001.pdf](https://aarp.org/content/dam/aarp/ppi/2020/05/full-report-caregiving-in-the-united-states.doi10.26419-2f9pp.00103.001.pdf)

exhale

**What goes into a  
marketing plan?**





# Situation Analysis

Based on the information available, a situation analysis is developed and should include, state of the respite category, target audience information, industry/competitive landscape, budget parameters, and any relevant information.

The situation analysis may also answer these kinds of questions:

- What are the strengths, weaknesses, opportunities, and threats?
- What are your projects key differentiators?

# Target Audiences

Paint a vivid picture of your audience using demographics (age, race, gender, income level) and psychographics (values, desires, goals, interests, and lifestyle choices).

Try to answer these types of questions:

- What keeps caregivers of older adults up at night?
- What are their pain points?
- What are their hopes?
- How do caregivers search for information?
- What media do caregivers consume?
- Who do caregivers of older adults trust for information?



## Persona Example

Nina lives in Amherst, NY. She's 51 years old and is married with teenage children at home. Her mother is deceased, and her father recently began showing symptoms of early-stage dementia. Nina is an accountant and works full-time. Although Nina has a brother and younger sister, she has been the primary caregiver for her father for six months now. She feels honored to take care of him but at the same time, she can't help but resent her brother and sister as they have not offered to help.

Nina's father lives 20 minutes away from her office. During lunch, Nina swings by and checks in on him. Following work, she brings him dinner and makes sure he is settled in for the night. Around 7:30 PM, she heads home, makes dinner for her family, and catches up on her work emails. She worries constantly throughout the night.

Nina hears about the Exhale Initiative and takes the Caregiver Intensity Index (CII). The CII indicates that she is in the red. Her top drivers of intensity are "no time for you" and "family disagreements". The top buffers of intensity are "having one person in their corner" and "feeling a sense of purpose around caregiving". Nina knows she needs relief and begins to look for opportunities within her community.





# Identify Marketing Goals

In this step, you want to define your overarching marketing goal for your initiative.

Goals are big-picture, broad, and generally long-term.

As you launch your new initiative, awareness should be your initial marketing goal.

## Example Goals:

- Build/increase brand awareness and name recognition
- Drive traffic to website
- Grow social media following
- Attract caregivers of older adults
- Obtain coverage with key media

# Identify Objectives

In this step you want to outline your short-term goals that will help you reach your marketing goal. Objectives are specific, measurable, and usually linked to specific tactics.



## Example Objective:

- Reach 1,000 caregivers of older adults within 6 months of launch



## Identify Strategies and Tactics

Once goals and objectives are set and agreed upon, an overall campaign strategy and supporting tactics can be developed.

Based on the strategy that rises to the top, think through specific tactics to support the strategy and how individual tactics can work together to form an overall plan.

### **Example Strategy:**

Leverage healthcare providers.

### **Example Tactic:**

Develop an informational flyer addressed to caregivers to be provided after doctor visits.

# Outreach Examples

A wide range of tactics can be utilized. Caregiver outreach tactic examples include:

- Distribute flyers in physician offices, eye doctor offices, rehab centers, grocery stores, churches, etc.
- Personal mailed letters
- Geo-targeted digital campaigns
- Post in local community caregiver Facebook groups
- Run targeted banners ads on caregiver resource websites
- Leverage Caregiver resources like NY Connects
- Hold presentations at local organizations
- Email blasts with a refer-a-friend offer
- Cross promote with other Exhale initiatives



# Budgeting

When you're building your plan, consider the following items for your marketing budget:

- Outside Marketing Services – determine what outside talent you need for graphic design, web development, copywriting, video, etc.
- Printing – budget for initial, as well as reprints
- Online Expenses – website hosting and domain renewals
- Postage & Shipping Fees
- Email service fee – MailChimp is an inexpensive option
- Mailing List Fees
- Advertising Fees
- Photography





## Outlining KPIs

Lastly, your plan should include Key Performance Indicators (KPIs) to assess the performance of your marketing efforts.

Example KPIs for an awareness campaign:

- Impressions
- Number of visitors to the website
- Time spent on website
- Social interactions





## Plan Activation: Creative Development

Once the plan and budget is approved, the items in the plan can be developed.

It's important to remember that your marketing and outreach materials should have a consistent look and feel and clear message keeping in mind what's important to the caregiver.

For marketing design services there are resources to consider including:

- [Catch a Fire](#) (free services)
- Design tools like [Canva](#)
- Graphic design interns through Universities (paid or free internship)
- Local advertising/marketing companies (pro-bono opportunities might be available)

**Questions?**