



**Market Research & Brand Recommendations
Executive Briefing Package**

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Branding, Communications and Outreach Maryland Workforce Investment System

Executive Summary

The Challenge

Full Capacity Marketing, Inc. (FCM) was retained by the Department of Labor, Licensing and Regulation (DLLR) to develop a brand strategy for Maryland's Workforce Investment System (System). FCM's first step was to conduct market research to provide an objective SWOT analysis about the current market position of the System which included 1) a random high growth sector employer survey; 2) job seeker mystery shopping; 3) interviews with the 12 local workforce investment areas (LWIA); 4) reviews of the LWIA strategic plans; and 5) a comprehensive communications analysis of Maryland's business outreach approaches, local and state websites, and use of social media. In light of Maryland's current high unemployment rates and the economic outlook, the analysis examined the System's effectiveness in informing employers and job seekers about the available resources and service locations throughout the state.

While there are pockets of communication and outreach success throughout the state, the results indicate poor awareness levels and a lack of understanding about the System and its benefits. The bottom line is that job seekers should know where to go to find jobs, and companies should know where to go to connect to workforce talent.

Maryland has deployed three "top-down" attempts to develop a collective brand strategy which have been unsuccessful to date. FCM uncovered the reasons for these failed attempts that include a lack of local buy-in, no sustainability strategies for building brand equity, and undefined brand architectures [naming and structuring of brands within the product portfolio of an organization] that would be costly and disruptive at the local level.

The Solutions

FCM recommends the development of a statewide brand strategy that will build the collective market position of the System and result in a) improved awareness among customers, key stakeholders, and funders; b) a deeper understanding and comprehension; c) a higher perceived value in the work and services; and d) higher market penetration and engagement of customers and partners.

This is first accomplished by identifying the optimal brand architecture option. Maryland currently has a decentralized brand approach with its 12 LWIA unique brands. Because Maryland's LWIAs are housed within very complex configurations (city, county, joint powers agreements), it is not surprising that there have been three failed attempts to implement a monolithic structure (e.g. using only one brand name). FCM is recommending two alternative options which have buy-in among Maryland's LWIAs, and proven track records in building market position in other states.

One is a holding company architecture that is similar to Proctor and Gamble (P&G)], where P&G is the parent company and marketed in specific instances when communicating and promoting the totality of its unique brands [Crest, Tide, Bounty, Charmin]. P&G's individual brands maintain their unique identities. In this structure, there would be a formal umbrella "P&G" brand/name that represents all of the unique LWIA brands when promoting the totality of the system (e.g. via statewide media campaigns, statewide advertising). Local and state stakeholders have developed a list of formal names and the top choices that emerged are Maryland Workforce Network, Maryland Workforce Partnership and Maryland Workforce Enterprise, with one of the tagline options "It's all about jobs" linking directly to the Governor's clear focus on jobs and the economy.

The second is an endorsed architecture structure that would function in a very similar manner as the holding company model described above, but instead of developing a formal brand name, a visually-appealing, well designed moniker could be used to identify local areas as part of the network of providers, offering a method to keep local brands intact while developing a visual linkage to a statewide brand. The symbol would signal job seekers, businesses and youth across Maryland that services are available in locations throughout the state.

Sustaining the brand would include capacity-building communications tools for LWIAs to implement the architecture, and an ongoing statewide workforce campaign modeled after the national campaign Workforce Investment Works that would showcase Maryland's unique brands and locations, workforce innovations, customer testimonials, and written and video customer success stories.

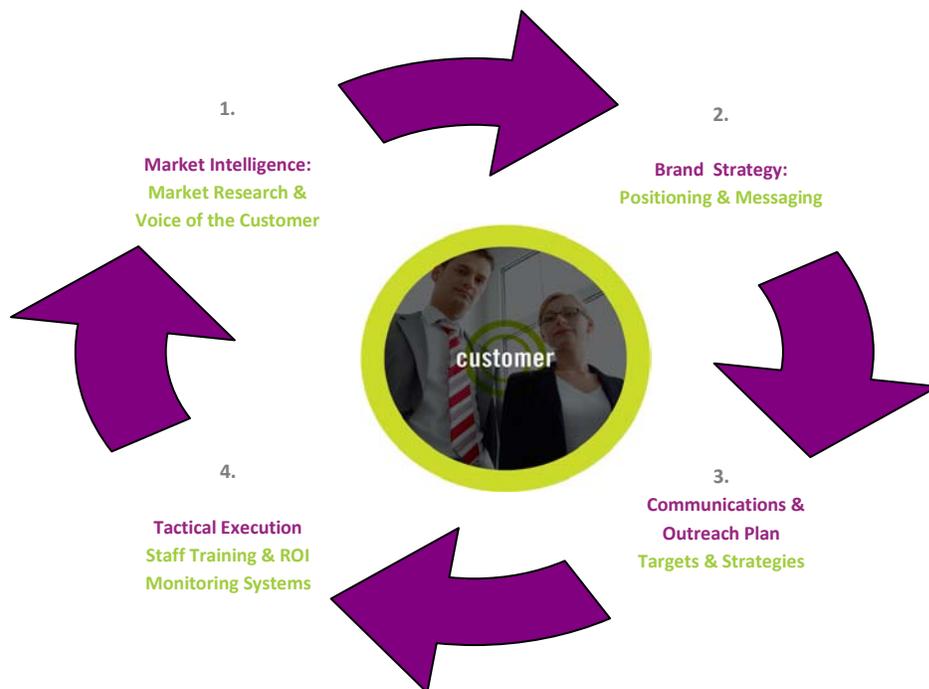
Project Background

Currently, the Workforce Investment Act (WIA) is the largest federal funding source for workforce development activities, and authorizes nearly 550+ local business-led workforce investments boards (WIBs) that cover all fifty states, Puerto Rico and the U.S. Territories to oversee and coordinate employment and training services through a network of 2,000 One-Stop Career Centers. Despite strong and historic bipartisan support, the fate of WIA is currently being heavily debated in Congress and is “front and center” in the news media. Critics from *The Wall Street Journal* and *The New York Times*, along with key elected officials continue to report that WIA programs are wasteful and don’t fill any critical need in the modern economy. Yet, over the past two years, the workforce system has provided employment and training services to more than 8.5 million job seekers; more than half (4.3 million) found jobs through the system during that time. In order to protect taxpayers, WIBs have done more and more with less and less. Since 2008, enrollment in WIA programs has increased by 234 percent, while funding has remained virtually unchanged. Given these numbers and results, what causes this bifurcated view of America’s workforce investment system?

One of the critical challenges centers on the lack of thoughtful and research-based brand strategies among the more than 47 different programs that represent the workforce investment system. To overcome these issues, some states have adopted a unified monolithic brand architecture using one brand only to represent the system (North Carolina, Nevada, Michigan). Others use a modified holding company approach like Procter and Gamble where local areas maintain their unique identities and states utilize an overarching brand for system communication (Florida, Colorado). California and South Carolina, to name a few, leave branding to the discretion of the local workforce investment areas (LWIAs).

Maryland currently has a decentralized brand approach with its 12 local workforce investment areas (LWIAs) developing unique brands within the local communities. Of the 12 LWIAs, six are administered by County governments (50%); one by City government (8.3%); two operate under a joint powers agreement (16.7%), and three have nonprofit status (25%). While these architectures can be effective, the configurations can also create missed opportunities, in terms of collectively leveraging and communicating the innovations and successes of the entire workforce system in Maryland.

Maryland has deployed three “top-down” attempts to develop a collective brand strategy which have been unsuccessful to date. To alleviate these challenges and include LWIAs in the process, FCM used a collaborative customer-centric model (below) in which objective data and the voice of the customer drives discussions and assists all of the stakeholders with making informed decisions about the most appropriate brand architecture that can maximize efforts at both the state and local level.



The market research phase included capturing the voice of the customer through: 1) a random employer survey targeting Maryland's high growth sectors; 2), job seeker mystery shopping to determine customer service aspects of the workforce investment system; 3) interviews with the 12 LWIA executive directors to ascertain opinions about implementation of a statewide brand; 4); reviews of the LWIA strategic plans; and 5) a comprehensive communications analysis of Maryland's business outreach approaches, local and state websites, and use of social media. Noted below are the identified strengths, weaknesses, opportunities and threats (SWOT) of the brands that currently represent the Maryland Workforce Investment System.

Strengths Summary

The Maryland Workforce Investment System has several areas of strengths that can be used to fuel a coordinated branding, communications and outreach effort among state and local stakeholders. These include interface with the job seeker market, pockets of success in deploying a coordinated employer outreach approach, and the strategic focus on business services and economic development linkages. A summary of system strengths is noted below.

Job Seeker Market

- Centers responded quickly to incoming phone calls with little wait times overall.
- Job seeker shoppers believed that Center staff is genuinely courteous, professional, respectful, helpful and friendly which are all customer-centric qualities that were deemed important by the 12 LWIA executive directors.
- A majority (70%) of Career Center staff asked probing questions to make sure that fulfillment occurs.
- Approximately 64% of job seeker shopper requests were fulfilled by the Career Centers.
- Calls to action are recommended by Career Center staff with a heavy emphasis on the Maryland Workforce Exchange (MWE).
- About 61% of shoppers indicated that they would become a job seeker customer at the conclusion of the mystery shopping call.
- The majority of Center staff (79%) let shoppers know that there are other Centers across the state when asked a direct question.

Employer Market

- There are pockets of success within business services teams utilizing a coordinated, consultative sales model that is proactive with employers.
- LWIA executive directors believe that a well coordinated employer outreach process is critical for success.
- Approximately ½ of the business services teams proactively contact businesses, with ½ of those using a consultative selling process.
- Teams that use proactive outreach methods conduct cold calling and face-to-face visits to garner new business customers.

Strategic Focus

- The National Association of Workforce Boards (NAWB) has indicated that in today's funding environment, high performing workforce boards should focus broadly beyond WIA; approximately 58% of Maryland's WIBs have a broad-based focus beyond WIA, many of which address high growth sector initiatives.
- All of the WIBs are focused on some aspect of partnership with economic development, an important linkage in garnering support and cross referrals for the workforce system.
- The Governor's Workforce Investment Board is focused on high growth initiatives.
- There is an agreement that it is important to build coordinated systems between state and local stakeholders that will improve market position and enhance the outreach capacity of staff and partners.

Weaknesses Summary

The Maryland Workforce System has several areas of weaknesses that can be addressed by implementing FCM's recommendations. Market position among high growth sector employers is particularly weak, and is reinforced by unclear messaging that fails to "connect the dots" for customers and prospects in understanding the system and its value propositions.

Current Market Position: Employer Market

- The majority of survey participants (70%) stated that they are not familiar with any local or state public organization in their area that provides business with employment related services at no cost.
- When provided with the name(s) of any organization(s) within their county, 63% of respondents indicated that they were still unfamiliar.
- Most of the organizations that are familiar with the focus of a local Career Center reported that they provide 'employee training', whereas the majority of organizations who are not familiar with such Centers believe they would provide 'job postings'; the Centers provide many more services than these two categories.
- Eight out of ten businesses report that they have not received any employment related services from one of the Career Centers, stating that this is mostly because they "didn't know it was available" or were "unfamiliar with [the] services" available.
- One third of the respondents (33%) who haven't utilized workforce services stated that it was because they "didn't know it was available" or were "unfamiliar with services" available.
- Overall, the few respondents who have received services are "Somewhat Satisfied" with their local center.
- Most teams only track process outcomes, and there are currently no ongoing systems in place to monitor market penetration rates at the local or state level which is a key measure in monitoring market position.

Customer Interface: Employer Market

- In general, business services' teams are comprised of small numbers of staff without a coordinated approach among funding streams.
- Teams struggle with not having a customer relationship management (CRM) tool that tracks customer visits and relationship-building activities.
- Without appropriate CRM tools, it is difficult to track conversations with employers, and use and/or aggregate the data to help make informed decisions.
- Business service team goals are loosely defined, and none of the organizations have a true objective understanding of how they are impacting the market.

Center Communications: Job Seeker Market

- Personal names are used only 30% of the time in a staff greeting.
- Approximately 35% of incoming calls to the Workforce Centers are answered by a Recorded Answering Service with some mailboxes not working properly and/or too full to accept messages.
- A transfer is not seamless in that a customer has to explain the purpose of the call again to the next staff person.
- Approximately 29% of shoppers indicated that staff could do a better job of explaining the benefits of using the Center versus just explaining the services offered; this caused shoppers to have a neutral response around the desire to become a customer at the conclusion of the phone calls.
- 54% of Centers do not offer compelling elevator speeches, but rather communicate a laundry list of services.

Overall Messaging: Disconnects

- One of the key calls to action for job seekers is to register on the MWE website; however there is no messaging to explain the focus of a Career Center, or a listing of Centers, on MWE.
- There is not a connection at the state or local level in terms of communicating via websites, videos or collateral materials that there is a network of organizations that comprise Maryland's Workforce Investment System.
- Outreach efforts are very fragmented with no standard communication tools for key customer groups.
- Web-based analytics are not used or monitored as a general practice.
- Most websites do not use effective communication platforms, are text heavy and do not showcase customer testimonials/success stories or WIB innovations which are missed opportunities in building third party credibility and brand value.

Opportunities Summary

The weaknesses noted above are typical of what FCM experiences across the country in working with state and local workforce investment systems. The Maryland Workforce System has many areas of opportunities that can be leveraged in building a coordinated branding, communications and outreach system.

- Approximately 58% of WIBs have a broad-based focus beyond WIA; showcasing these innovations in a systematic way would build market position among funders, stakeholders and customer groups.
- All of the WIBs are focused on some aspect of partnership with economic development. Communicating how the GWIB and LWIAs are focused on economic development can be highlighted in communication strategies to build value and garner more support for the system.
- A coordinated cross linking website strategy would improve search engine optimization.
- The GWIBs employer connections could be used to generate more support across the state on behalf of the business services teams.
- The GWIB could be better leveraged and connected as a champion of the system through statewide outreach and communication strategies led by the Governor.
- While approximately one-third of employers that responded to the survey are ‘Somewhat Interested’ in receiving services from their local Workforce Center, there is ample opportunity to explain the breadth and depth of how Centers can help businesses thrive in a downturn economy.
- Local WIBs have been meeting to discuss how to better connect and coordinate regional strategies, including business services.
- There is agreement among all stakeholders that there is a need for strategic and coordinated communication approaches that will improve market position, and to create systems and capacity-building tools; focusing on these high value-added agreed-upon areas will help overcome past failed attempts at branding and coordinated communication and outreach efforts.

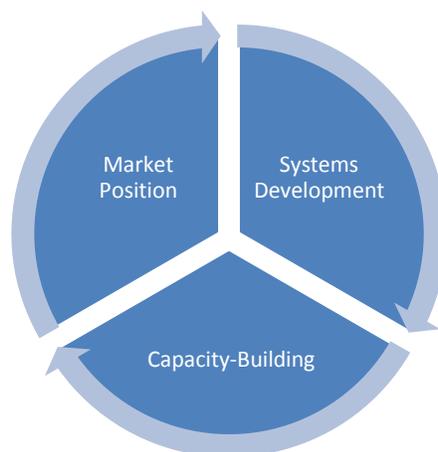
Threats Summary

In any SWOT analysis, the “threats” are the items that can cause the most angst, as they are out of immediate control. However, the Maryland Workforce System can build a proactive plan to be in a better position to diversity funding streams and garner support, in spite of the funding environment and the threats noted below.

- There is a year-over-year trend in decreased WIA funding.
- There have been statewide leadership changes within DLLR.
- The state election is two years away that will lead to a change in Governors.
- WIA reauthorization may not occur in this election year.
- If WIA reauthorization is passed, it will likely restructure WIBs.
- Negative media reports from all areas of the country continue to surface touting the “wastefulness of WIA and the system”.
- Negative GAO reports continue to be released.
- There is an environment in Congress to cut spending.
- Loss of market share may occur, along with missed opportunities for strategic partnerships, if there are continued fragmented outreach efforts.

Recommendations

Given the SWOT results, FCM recommends addressing the weaknesses in the analysis, and capitalizing on the strengths and opportunities. There are three areas of recommendations based on the desired outcomes of stakeholders noted in the figure below that include 1) Market Position; 2) Systems Development; and 3) Capacity-Building.



Market Position

FCM recommends the development of a brand strategy that will build the collective market position of Maryland's Workforce Investment System and result in a) improved awareness of the workforce investment system among customers, key stakeholders, and funders; b) a deeper understanding and comprehension of the workforce investment system and its important mission among these audiences; c) a higher perceived value in the work and services of the workforce investment system by these target audiences; and d) higher market penetration and engagement of customers and partners. Job seekers should know where to go to find jobs, and companies should know where to go to connect to workforce talent.

The U.S. Department of Labor's (USDOL) is realizing the importance of building market position of the workforce investment system to funders. In July 2012, it released its Training and Employment Guidance Letter (TEGL) 36-11 that aims to create a national brand for the One-Stop Career Centers across the country which is one component of the workforce investment system. States have the option of adopting the brand for its One-Stops or utilizing the tagline, "*part of the American Job Center Network*". This new directive will need to be implemented as part of Maryland's brand strategy.

Maryland has attempted to implement a statewide brand three times, and all three efforts have been unsuccessful. In interviews with workforce stakeholders, FCM uncovered the reasons for these failed attempts that include a lack of local buy-in, no sustainability strategies for building brand equity, and undefined brand architectures that would be costly and disruptive at the local level.

Brand Architecture Options

Brand architecture is the naming and structuring of brands within the product portfolio of an organization. Brand architectures may be **monolithic** (one corporate name is used on all products and services, e.g. General Electric); **endorsed** (sub-brands are linked to the corporate brand by means of either a verbal or visual endorsement, e.g. Apple iPod, Apple iPhone); or **freestanding/holding company** (each product or service is individually branded for its target market with or without linkage to the parent company, e.g. Proctor & Gamble and its various brands). FCM has implemented all three architecture options in the workforce investment system with sustainable success; the key success factor is garnering the support of the system's brand ambassadors, especially at the local level. The advantages and disadvantages of these three options for the Maryland Workforce Investment System are noted below.

Architecture Option	Advantages	Disadvantages
Monolithic – Uses only one name	One name for the entire system	No local buy-in; disruptive and costly
		75% of WIA administrators are embedded in County/City governments that are governed by unique brand guidelines.
		Requires complete rebranding of the system
		Sets unrealistic customer expectations as One-Stops are not "franchises" with identical services & initiatives in each area
		No long-term success without local support for brand management and implementation
Endorsed - Sub-brands are linked verbally or visually to corporate brand	Identifies local areas as part of a network of providers but allows local brand flexibility	Must include national tagline & logo in the architecture
	Keeps local brands intact while developing a visual linkage to statewide brand	
	Secured buy-in from 70% of LWIA directors on this option; waiting for call-back on remaining 30%	
Holding Company – Formalize statewide brand name with local brands	Formal name can be linked to a defined URL for outreach purposes including statewide campaigns	Must include national tagline & logo in the architecture
	Buy-in secured from 100% LWIA directors on this option	

Brand Architecture Recommendations

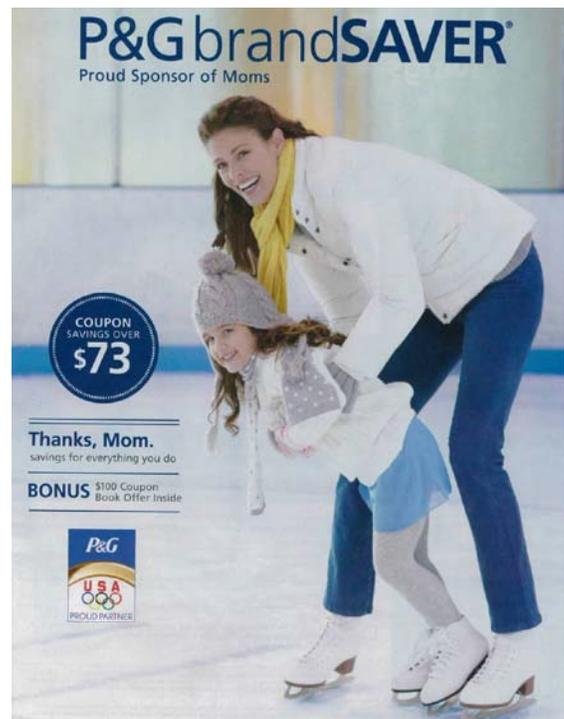
Because Maryland's LWIAs are housed within very complex configurations (city, county, joint powers agreements), it is not surprising that there have been three failed attempts to implement a monolithic structure. FCM is recommending two of the three options detailed in the summary grid including either a holding company or the endorsed architecture. Both of these options have buy-in among the LWIAs.

Holding Company Model

A holding company architecture is similar to Proctor and Gamble (P&G), where P&G is the parent company and marketed in specific instances when communicating and promoting the totality of its unique brands [Crest, Tide, Bounty, Charmin]. P&G's individual brands maintain their unique identities. In the recommended brand architecture, there would be a formal umbrella "P&G" brand/name that represents all of the unique LWIA brands (Crest, Tide, Bounty) when promoting the totality of the system (e.g. statewide media campaigns, statewide advertising). Here are the key points about the recommended architecture that stakeholders need to understand.

- 1) An umbrella brand (logo/tagline/name) would be developed to represent and communicate the collective LWIA brands within Maryland during times of strategic collective outreach.
- 2) The umbrella brand is a neutral entity as it represents all system stakeholders.
- 3) The umbrella brand is a communications tool to reinforce the message that there is a network of local brands that serve their unique labor markets and customers.
- 4) The umbrella brand can showcase and leverage all of the innovations and successes occurring within the 12 LWIAs.
- 5) Just as P&G promotes their unique individual brands in the ad below, the umbrella brand is used in statewide promotions of the system.

P&G = Umbrella brand
Individual Brands Below = LWIA Brands



Local and state stakeholders have developed a list of formal names and the top choices that emerged are Maryland Workforce Network, Maryland Workforce Partnership and Maryland Workforce Enterprise, with one of the tagline options "It's all about jobs" linking directly to the Governor's clear focus on jobs and the economy.

Endorsed Architecture Model

An endorsed architecture structure would function in a very similar manner as the holding company model described above, but instead of developing a formal brand name, a visually-appealing, well designed moniker could be used to

identify local areas as part of the network of providers, offering a method to keep local brands intact while developing a visual linkage to a statewide brand. The symbol would signal job seekers, businesses and youth across Maryland that services are available in locations throughout the state. The LG symbol (right) is an example. A visually appealing design for the system could reflect the Governor’s focus on jobs and the economy (e.g. MJ – Maryland Jobs).



Brand Implementation

No matter what brand architecture is selected, the most challenging aspect will be consistent implementation of the brand at the local and state level. Since the umbrella brand is a neutral entity that is not owned by any state or local organization, FCM recommends housing the brand via a standalone website that models the National Association of Workforce Boards’ (NAWB) national ongoing workforce campaign called Workforce Investment Works (WIW).

The WIW campaign is a storytelling website that showcases workforce innovations, customer testimonials, and written and video customer success stories about all of the brands that represent the workforce investment system. The campaign 1) helps America understand the value proposition of workforce-funded programs and services; 2) generates support of workforce funding through social media; and 3) builds the capacity of workforce stakeholders to utilize consistent messages with their local elected officials and the news media to bring awareness around the repercussions of cutting workforce funding. With nearly 4,000 entries from across the U.S. and around the world, WIW was selected for a 2011 Davey Awards by the International Academy of the Visual Arts (IAVA) in the integrated campaign category, and continues to serve as a powerful outreach tool.



Since the Davey Award announcements, WIW has built substantial momentum, and garnered interest from state and local stakeholders. The NAWB currently allows organizations to tailor the award winning website to a state-specific campaign. Any success stories, innovations and customer testimonials that are published on the state campaign websites automatically flow to the national WIW site, so that there is no duplication in entering data. This allows the NAWB to continually build the national database of successes and innovations, which in turn, builds a stronger business case collectively for workforce funding while showcasing state successes.

For example, California adopted the WIW campaign and tailored it to meet its unique needs. This particular campaign is “owned” by the California Workforce Association with the tailored tagline “Working for California”. The Association and its members now have a central repository for showcasing industry and sector partnerships, workforce innovations and customer success stories and videos. It has a unique ‘Find Workforce Experts’ section that identifies all of California’s unique brands at the local levels with contact information and web links. This model would work exceptionally well for Maryland as a neutral collaborative site to build market position among customers, partners, funders and key stakeholders. It would serve as an additional customer touch point for building awareness along with DLLR, MWE and all of the local websites.



Example: “CWA” would be replaced by Maryland’s “Umbrella Brand” – either the formal brand name if using the holding company architecture, or the moniker if using the endorsed architecture.

Brand Toolkits: Consistent Messages

FCM recommends the development of a brand toolkit to help state and local stakeholders understand how to communicate key messages about Maryland’s umbrella brand when appropriate. Additionally, FCM recommends developing key messages that can be used to explain the workforce system components and the connection of its network of partners and stakeholders. These key messages can be translated to local and state websites, press bylines, and collateral materials.

Capacity Building

The SWOT analysis uncovered several critical areas around customer interface and communications that can be addressed in a series of capacity-building webinars and toolkits for state and local stakeholders.

FCM recommends the topics noted in the following grid.

Capacity-Building Webinars

Webinar	Description	Toolkit
Brand Toolkit & Storytelling	Overview of the umbrella brand, how to submit successes & innovations on the new umbrella brand campaign website	Key Brand Messages & Storytelling Tools
Customer Communications	FCM will facilitate teams in developing standard protocols for customer communication including phone, FAQ, elevator speeches, sales processes	Live Your Brand Toolkit
Effective Workforce Websites	How to evaluate a website for effectiveness and implement industry benchmark practices to reinforce branding	Website Audit Toolkit
Social Media Applications in Workforce Development	Guidelines on how to best leverage social media and use it effectively as part of an overall communications plan	Social Media Toolkit & Guidelines
Speaking the Language of Business	How to meaningfully engage employers using an action plan based on market research, targeted prospecting and concise communication with businesses	Business Engagement Toolkit

Systems Building

FCM recommends the immediate creation of a statewide Communications Taskforce that will serve in an advisory capacity to the Project Taskforce. It would be comprised of a representative from each LWIA, along with state workforce stakeholders. The purpose of the Communications Taskforce is to manage the brand consistently and collaboratively, and discuss strategies for leveraging various grant opportunities, communication strategies and statewide communication efforts. FCM designed a similar integrated marketing system to bridge the gap between state and local efforts and improve brand awareness and market penetration for the Colorado Workforce Development Council which has been sustained successfully by the Council since 2004. Because travel budgets are limited, the Taskforce would meet via online meeting technology and use the newly designed website for the umbrella brand as the repository to post documents, grant opportunities and innovations in the back-end. The Project Taskforce would remain intact providing project oversight, while the broad-based Communications Taskforce would serve to inform the Project Taskforce as the project moves into implementation. There are several topics that need to be addressed with the Communications Taskforce including: a) statewide campaign launch; b) methods for how business services processes and protocols will be coordinated; c) engagement with economic development; and d) sector strategy initiatives.

Next Steps

DLLR members of the Project Taskforce will be briefing the Governor's staff on the recommendations in this report. FCM will present the options to the GWIB on 9/19/12 for input. DLLR is assembling a brand committee that will work with FCM to implement the selected brand architecture and move through the necessary design tasks.