XYZ Health Education – Project Overview

The client for this example is XYZ Heath Education (anonymized at their request.) XYZ, a 501-C3, provides extra curricular for-fee health education courses to high school students.

The goal of this project was to support development of a strategy for post-pandemic business development, including geographic expansion and more use of online courses.

These work products were created in the fall of 2020, during 2 two-hour online workshops.
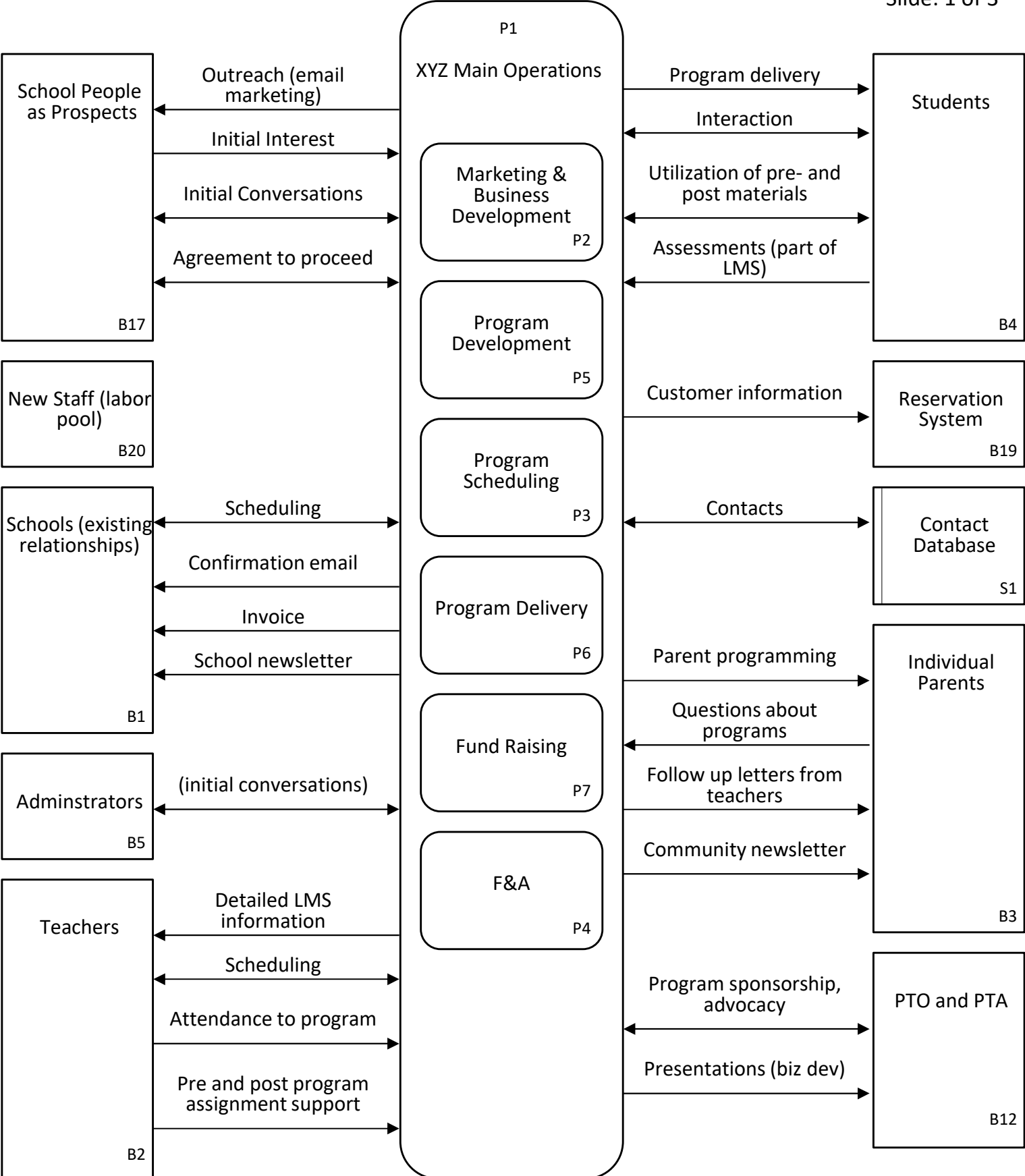
ActionMap subsequently provided additional consulting to the XYZ Executive Director around how to utilize these findings for developing a strategy.

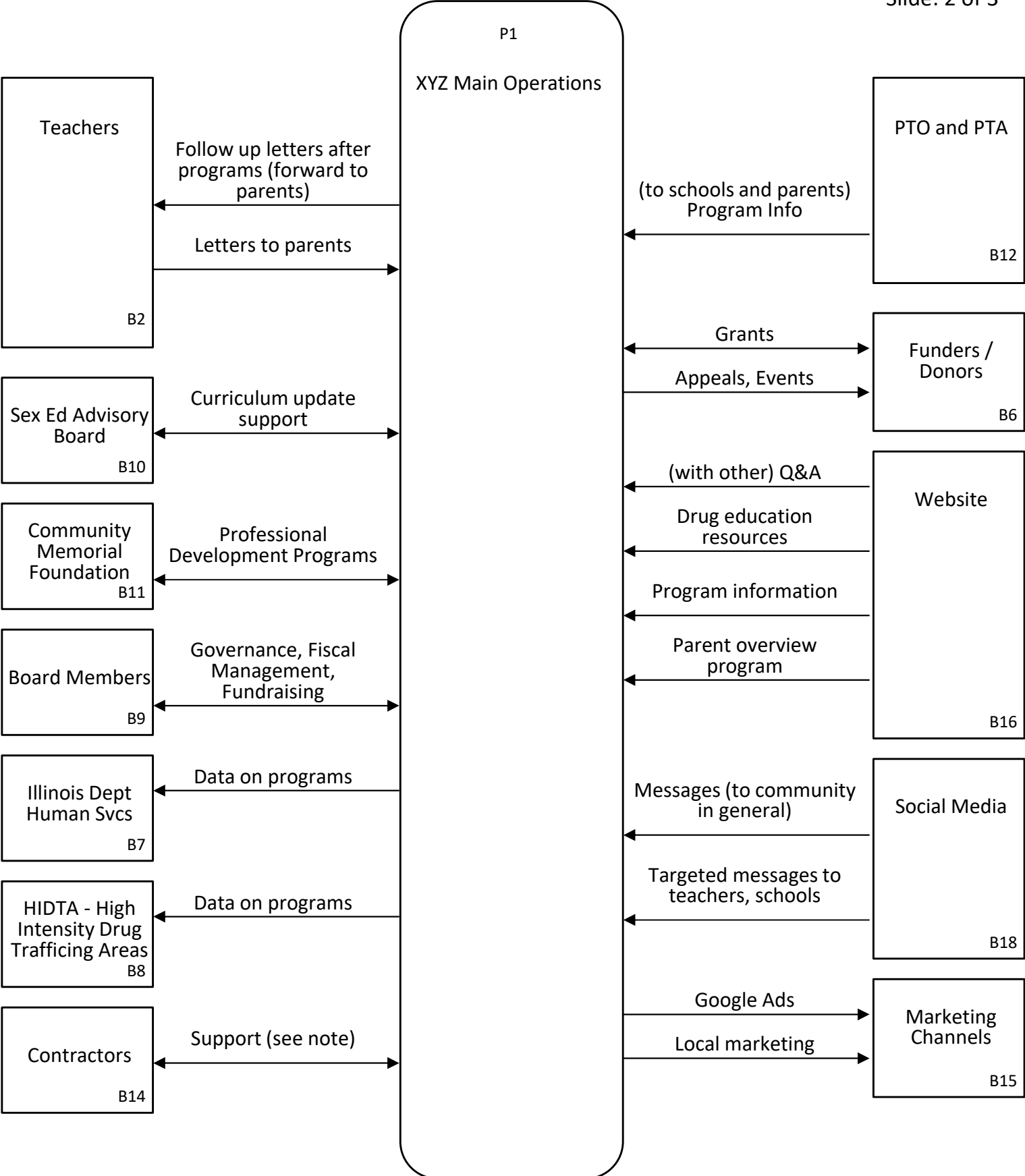The resulting plans were approved by the XYZ board of directors in the Spring of 2021.

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Area Title:	XYZ Business Development Planning (...	ID:	TW7LG19M
Map Title:	XYZ Main Operations	Map ExtID:	XV9U6RX8
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P1

XYZ Main Operations

Teachers — B2
- Follow up letters after programs (forward to parents)
- Letters to parents

Sex Ed Advisory Board — B10
- Curriculum update support

Community Memorial Foundation — B11
- Professional Development Programs

Board Members — B9
- Governance, Fiscal Management, Fundraising

Illinois Dept Human Svcs — B7
- Data on programs

HIDTA - High Intensity Drug Trafficing Areas — B8
- Data on programs

Contractors — B14
- Support (see note)

PTO and PTA — B12
- (to schools and parents) Program Info

Funders / Donors — B6
- Grants
- Appeals, Events

Website — B16
- (with other) Q&A
- Drug education resources
- Program information
- Parent overview program

Social Media — B18
- Messages (to community in general)
- Targeted messages to teachers, schools

Marketing Channels — B15
- Google Ads
- Local marketing

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Growth through Lead Generation Service

B22

Re-establishing Relationships

B21

XYZ Main Operations

P1

Misc Suppliers and Vendors

B13

Expansion Strategy

B23

Map and Plan Area:　　　**XYZ Business Development Planning (v2)**
Map and Plan Area ID:　　　**TW7LG19M**
Map Title:　　　　**XYZ Main Operations**
List Title:　　　　**Map Parts, Evaluations, Priorities**
Date/Time:　　　　**2021/10/30 07:16:14 PM**

　Flow codes:　==>[] : to Central Process;　<==[] : from Central Process;　<==> : to/from Central Process

Main Text
XYZ Business Development Planning (v2)　　Map and Plan Area Name
XYZ Main Operations　　Map Central Process
Note　Organization or Group
Note　Current/Future Exploration
Note　Main Operations
Note　Staff
Major Goal　Expand into new markets
Major Goal　Expand current programming to current schools
Major Issue　Every district, different decision makers
Major Issue　Identifying other schools that might be interested
Major Issue　Schools lack funding
Major Issue　Programs are mostly 90 minutes, most classes are 45 minutes
Major Issue　Getting the time with the right administrator is difficult
Major Issue　Programs are seen as "nice to have" not necessity
Major Issue　Sex Ed and Drug Ed are non mandated
Major Issue　Canot market to kids, or individual teachers, and parents cannot make the decision, so...complex, narrow decision path
Major Issue　Complex, narrow decision path
Major Issue　Very little brand awareness for new market - furthest reach = 30 / 45 miles
Major Issue　Some perception of many changes - field trip, then in-house, then digital, then home (pandemic), and new brand, some customers see "too much change"
Major Change Idea　Recently created Digital Platform
Major Change Idea　Complete program overhaul - more educational time available, more robust program
Major Change Idea　With "Priority Partners" - Use data to show learning growth, make programs evidence based
Note　"Priority Partner" = receives comprehensive programming, personalized planning, parent meetings, access to data
Major Change Idea　Move up to the District level to create relationships
Marketing & Business Development　P2
Program Development　P5
Program Scheduling　P3
Program Delivery　P6
Fund Raising　P7
F&A　P4
Left Side Column
School People as Prospects　B17
Issue　Impact on organizational work volume
Note　Supported by virtual delivery
Goal　Hypothetical Case: Add one school per week

Note	New programs per year (existing schools): 2018: 2047 programs, 2019: 2282 - # of schools went down
Note	Don't normally add new schools
Note	Currently in almost all schools in local geography
Note	Decision: density in current schools vs new schools

<==[] Outreach (email marketing)

Issue	Identifying prospects
Change Idea	Lead generation service
Goal	If outside current delivery area, message should be about only virtual delivery
Issue	How to get them to open, read and respond to the email
Note	Not proactive, they mostly come to XYZ

==>[] Initial Interest

<==> Initial Conversations

Issue	Need to discuss cost; sometimes assumed to be free
Note	Topic: explanation of how it works;

<==> Agreement to proceed

Note	Mostly verbal agreement, rare to have written agreement

New Staff (labor pool)   B20

Issue	Long training time
Issue	Need to re-enlist staff to support Learning Management System
Change Idea	Current approach: estimate from projections from prior years

Schools (existing relationships)   B1

Issue	Issue: getting schools that dropped program during pandemic to come back

<==> Scheduling

<==[] Confirmation email

<==[] Invoice

<==[] School newsletter

Adminstrators   B5

<==> (initial conversations)

Teachers   B2

<==[] Detailed LMS information

Note	LMS = Learning Management System = within 2 weeks of program dates

<==> Scheduling

==>[] Attendance to program

==>[] Pre and post program assignment support

<==[] Follow up letters after programs (forward to parents)

==>[] Letters to parents

Heath Ed Advisory Board   B10

Note	Educators, area teachers and admin, health & ed depts

<==> Curriculum update support

Community Memorial Foundation   B11

<==> Professional Development Programs

Note	Staff and Board; "Capacity Building" for staff and board

Board Members   B9

Goal	Board wants organization to expand
Note	Not doable in FY 20, reset for FY 21

<==> Governance, Fiscal Management, Fundraising

Illinois Dept Human Svcs   B7

<==[] Data on programs

Note From reservation system

Note Staff time, etc.

HIDTA - High Intensity Drug Trafficing Areas   B8

<==[] Data on programs

Note Student oriented

Contractors   B14

Note Marketing, IT, Program Evaluation (data, surveys, follow ups, piloting, alignment with objectives) Curriculum Development

<==> Support (see note)

Growth through Lead Generation Service   B22

Issue Internal Biz Dev capacity

Issue Increased volume for reservations, invoicing etc.

Change Idea Hypothetical Target: 10% growth in 1 FY: approx. 1 per week

Goal Increase response rate

Issue Capacity Planning

Note They can target specific geographical areas

Note What are marketing options

Note "Ed Week" magazine

Right Side Column

Students   B4

[]==> Program delivery

<==> Interaction

<==> Utilization of pre- and post materials

[]<== Assessments (part of LMS)

Reservation System   B19

Note Customized a few years ago

Note CRM - ZOHO

Note Working on a Dashboard to make information more usable for marketing

Note Number of reservation: 2282 programs, 621 schools, 77,462 students

[]==> Customer information

Note Conversations, names, etc.

Contact Database   S1

Note Segmented by School, Parent, Community

Note Constant Contact

<==> Contacts

Individual Parents   B3

[]==> Parent programming

Note Community presentations

[]<== Questions about programs

Issue Can be time consuming

Note Website is helping

[]==> Follow up letters from teachers

[]==> Community newsletter

Note Can opt-in from the letters from teachers, or on website

PTO and PTA   B12

<==> Program sponsorship, advocacy

[]==> Presentations (biz dev)

[]<== (to schools and parents) Program Info	
Funders / Donors B6	
<==> Grants	
[]==> Appeals, Events	
Website B16	
Note No capture of information on individuals, beyond newsletter opt in	
[]<== (with other) Q&A	
[]<== Drug education resources	
[]<== Program information	
[]<== Parent overview program	
Social Media B18	
Note Facebook	
[]<== Messages (to community in general)	
[]<== Targeted messages to teachers, schools	
Note Advertising	
Marketing Channels B15	
[]==> Google Ads	
[]==> Local marketing	
Misc Suppliers and Vendors B13	
Expansion Strategy B23	
Issue Need to establish identity and presence "Who is XYZ?"	
Change Idea Strategy alternatives: 1) expand programs in current schools, 2) expand to new geographies, 3) some kind of restructuring and/or reprogramming	
Note Restructuring = how? what? why? No reason to	
Note Reprogramming: already did that, to digital, that was the motivation for expansion	
Note Seems pretty clear to do 1 AND 2, but ramp them in phased manner	
Note Be sensitive to existing workloads, and support them as needed	
Change Idea With enough lead time, XYZ can acquire teaching resources as needed	
Change Idea Move up to district level relationships	
Note To integrate program impacts across class years	
Note Next step: Exec Dir and Jim assemble general plan then meet with whole group to assess that	
Re-establishing Relationships B21	
Goal Re-establish program volumes	
Note Long term relationships, should be easy to restart: maybe 90%	
Note When transition from "center" to "school" delivery, did not lose relationships	
Note When will that occur	
Change Idea Develop and implement specific program for reestablishing relationship	
Note Will compete with new relationships for staffing	