

NDIS Success Round 2 webinar 5 script

Slide 1

Welcome to the fifth webinar as part of the NDIS Success Roadmap: Strategies for Success. Today, we are going to talk more about marketing your new or expanded NDIS services.

Slide 2

Community Business Bureau acknowledges the traditional owners of country throughout Australia. We recognise their continuing connection to land, waters and community. We pay our respects to them and their cultures, and to elders past, present and emerging.

Slide 3

The NDIS has completely changed the business models of disability service providers in recent years. The old market was one where service providers were block funded and individual clients (participants) had to come to the provider. Now, the individual participant has choice and control over the service provider that **they** engage. The power is in their hands! In response, disability service organisations now have to:

- 1/ attract new clients to cover lost clients through attrition, and in order to grow; and
- 2/ have a greater focus on the customer journey and experience.

Initially, most participants stayed with their existing service providers, however, as new services and ways of service delivery are available, people make more informed choices and choose more flexible, responsive and diverse services. More innovative services are emerging.

From the organisational perspective, many longstanding disability providers will have started out with a mission that was predefined by the existing beneficiaries of the organisation, and this may need to evolve with the market changes too.

Welcome to the Strategies for Success webinar. My name is Andrew Ellis and on behalf of the CBB business consulting team I would like to welcome you to this NDIS success webinar.

Slide 4

In today's webinar we will talk about strategies for success with improving your marketing strategy and customer journey/experience to have a sustainable business. We will speak about both attracting and retaining clients.

This is the fifth webinar in our NDIS Success Series.

In the **first** webinar, we provided insights into the fundamentals for success within the NDIS market and who gets an NDIS plan, what is funded and how the money can be spent.

The **second** webinar was about the importance of understanding the market you want to operate in. We looked at the people that you support, what they need and want from their NDIS provider and who else is already providing NDIS services in your area.

In the **third**, we spoke about how to design new NDIS services for people with disability.

In the **fourth**, we looked at NDIS compliance requirements for registered providers but also for unregistered providers – that is, quality, compliance and risk.

In the **last** webinar of this series we will explain the importance of understanding and analysing your potential revenue and associated costs. Financial viability and sustainability is critical when operating in the NDIS.

If you haven't had the opportunity to watch the earlier webinars, you can find them on the CBB website. Watching all webinars will maximise your learnings. We also recommend you work through the Activity worksheets. There is an Activity worksheet for each webinar and we have compiled a template which will help you to develop a Business Plan. Additional information and links are available on our website.

We cannot cover every detail in depth in a short webinar and you will surely have questions after watching the webinars. Please use the LinkedIn forum to ask questions or to give us some feedback. You can access LinkedIn online or you can download the LinkedIn app onto your phone and there is no cost involved. If you have trouble accessing the LinkedIn Group please give us a call or email us at NDIS@cbb.au.

Slide 5

There are five parts to today's webinar.

- Firstly, we will talk about the connection from your business strategy to marketing strategy
- Secondly, we will talk about the marketing strategy
- Thirdly, the marketing plan. This includes the marketing mix which involves the P's of marketing: Product, Positioning, Price, Place, Promotion.
- We also want to spend some time talking about promotion; and then
- Lastly we will look at the customer experience and journey.

As we go through today's webinar, I encourage you to have the Activity worksheet close to hand. You might find it useful to pause the webinar so that you can complete the exercises as you go.

Slide 6

We are going to start off today looking at connecting the business strategy to the marketing strategy.

If you have been following along all of the webinars, then you would recall having done some exercises in the activity workbook and perhaps even with the business plan template that will prepare you for what we do in this webinar.

Slide 7

Our second webinar Understanding the Market asked you to think about such things as: What is your strategy? Who are the target markets? Who are your competitors and what mitigation strategies do you have to compete against them? What differentiates your organisation?

The third webinar on Service Design had you thinking about: What does your service (product) look like? What markets and locations are you serving?

All of these elements are critical in setting the basis for your marketing strategy, plan and activities.

Slide 8

The marketing strategy needs to align with the business strategy and your marketing strategy will help you achieve your business strategy – or the overall strategic plan.

Marketing goals or objectives need to link to the overall business goals and objectives, since the purpose of marketing is to support the overall organisation's vision and strategic direction.

Slide 9

Many or even most organisations working under the NDIS will have growth as some part of their goals and strategic plan. Some many want to grow quickly and significantly.

But maybe you are a sole provider and in a small regional market and don't plan to grow but do want to maintain consistent customer numbers – and that's ok. Strategies within this webinar will help you with attracting new clients, because that is important to ensure that your business doesn't go backwards if a client relocates from your region to somewhere else or was to pass away.

If you are looking to grow your overall business and your NDIS business, you need to be realistic about what growth to target. How much growth do you want? How much growth can your organisation handle? How will you scale to achieve growth?

In Australia 20% year-on-year growth puts you into the fastest growing businesses, so doubling in a year is well beyond the norm and carries major risks and challenges.

What does your strategic plan say about growth? It's important to understand your business strategy before you do your marketing strategy. Plus the methodical build-up in your strategy development (and market analysis) like we spoke of in earlier webinars will normally include exercises like SWOT/SOAR and PESTEL that can be used to inform your marketing strategy and goals. If you don't have a current organisational strategic plan, then you should start here as it will inform marketing strategy and provide a framework for decisions.

If you have inefficiencies in your organisation at the moment, and then scale up and grow under the NDIS, then you will also be scaling up those inefficiencies – so it may be worthwhile addressing internal growth constraints before pursuing major growth in services. One organisation I know some years back had a two year strategic plan where the theme of the first year was “building for growth” and the theme for the second was “going for growth”. They knew that they wanted to grow, but needed to address some key systems and processes before they got too far.

Slide 10

We've seen from earlier webinars that the NDIS market continues to grow with still another 100,000 participants to be added to the NDIS before it reaches maturity. And we also know that utilisation rates across the country are still quite low, and there are opportunities to serve more customers with more services from both these perspectives.

Under the NDIS business model, it is critical that you be able to secure enough client business to make your NDIS product or service financially viable. Whether that is about sustaining a consistent client load (replacing any lost customers) or growing will depend on your strategic plan and vision.

How well you attract new clients will have a significant impact on your success as an NDIS business – and this comes through marketing. It is important to understand how do (potential) customers know to come to your organisation.

Marketing is about generating leads and potential new customers.

Slide 11

We all like to think that we do a good job of what our organisation's main purpose and services are. But, marketing can force us to ask the hard questions about how good are we *really*? How good are we at ensuring a consistent delivery of service that every customer goes home valuing? And how good are we when compared to our main competitors?

It's important to find a sweet spot between the following:

- Purpose – specialist or generalist? The purpose points to the strategic plan and strategic direction. It also relates back to the Objects of the organisation found in the Constitution – and the reasons that others (perhaps before your time) started the organisation.

- Commercial viability – will you focus only on services that deliver a minimum x% margin, or will you loss-lead on some services?
- Principles – are there services you specifically will not provide?
- Values – are there customer goals that you specifically will not cater to?

Slide 12

Our next topic today is to look at the marketing strategy.

Slide 13

We will come to see through the rest of this webinar that marketing is the activities and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

It's a process for exchanging value between humans for benefit.

Slide 14

The marketing strategy involves looking at the brand, target segment or segments, positioning for each segment and marketing objectives for each segment.

We'll talk more about each over the next few slides.

Slide 15

Starting with the Brand, what brand will you use? Will it be the company name or a different name? For a sole trader, your brand might be built around your own name.

A lot of the time, the brand will be the same as the business name but it doesn't have to be.

For example, if your company name is 'XYZ Incorporated', then do you just want to be known as XYZ?

If you are a large organisation, or work across a number of different markets (e.g. disability and aged care) then do you want a different brand for your NDIS services?

When adding new services, is it a natural fit to your current brand that customers know you as, or would it be worthwhile setting up a different brand / sub-brand?

Slide 16

Who is your target audience or target segment/s? Not the same as CUSTOMERS.

The target audience for your marketing activities are POTENTIAL customers – those who may interact with your organisation in future.

Slide 17

Who do you want to target with your marketing efforts? Each segment should be unique with no cross over.

For example, it might be that you are a physiotherapist practice specialised in working with people who have neurological conditions. You might have clients with MS, acquired brain injury and Parkinson's disease. Each could be a different target segment for your promotion.

You would recall we spoke about target markets and segments in the earlier webinar Understanding the Market. From the data analysis in that webinar, you would have some good definition of your potential customers and target segments.

If you haven't watched the second webinar, then it would be worth going back and doing so – even stopping this one now to watch that first.

Slide 18

Defining your target segment will help with other decisions you need to make with the marketing plan.

Who are your most important customers? Who are the beneficiaries that the organisation was set up to provide services to? These are your target markets.

Marketers have many different ways of segmenting or breaking down the target market of potential customers. When you define this, there's no right or wrong, as it depends on the market. Each target market or segment should be unique. It could be based on demographic information, type of disability, geographic, behaviour or psychographic factors. The more accurate you can define this, the better it will help when setting out your marketing plan.

We've talked about your market position in webinar 2 Understanding the market, but: What value do you offer your customers? How does this address their needs? How is it different or better than your competitors? Instead, it might be that you are in a rural or remote area where there aren't any competitors.

Slide 19

There might be a range of different issues which your target segments have as drivers and barriers that you need to consider in marketing and selling services to them.

What drivers are there that prompt consideration of your service? For example, is it driven by the needs and funding in their NDIS plan for daily supports, or is it related to achieving a goal?

Are there barriers that prevent your target segments from accessing your services? This might be physical in the case of access limitations or the distance from your premises to their home. It could relate to thoughts or beliefs about your organization. The market might

prevent you from working with the customer depending on the content of their NDIS plan or local competitors. Life circumstances with the other supports the participant has, could act as a barrier in choosing your service; and there might be other issues.

Slide 20

When it comes to positioning your organisation based on the different market segments, you should recall the core competencies (strengths) and market understanding (including market size and competitors) that we spoke about in webinar 2.

Positioning: this is your brand, how you compare against competitors and your unique strengths.

For each target market segment: review what they want and what would their motivators be.

From here you can develop your positioning: What you/we want to be known for each segment? Whilst unique, don't want to make them too different. There's a difference between positioning and messaging.

As an example: think of an organisation whose overall purpose is to work with people with visual impairment. They have a part of the business working in disability employment services. The purpose of this business unit is twofold: firstly in supporting people with visual impairment with finding and keeping employment, and secondly, they are a generalist provider with a broader client base, and this work creates a surplus which is applied to the other charitable purposes of the organisation working with people with visual impairment.

In this example, the disability employment services business has two market positions:

1/ to the customers who have a visual impairment – they want to be seen as a specialist provider which is the best business of its kind working with people with visual impairment. They want to position as a specialist and an expert.

2/ to customers with other forms of disability – they want to be seen as an employment services business capable of supporting anyone to get and keep a job.

The messages are important to not get mixed up – e.g. if a potential customer with a physical disability just considers that they are focused on people with visual impairment, then they would not know to go there.

Slide 21

One way to think about the Positioning is to look at what author Simon Sinek refers to as the golden circle.

The golden circle starts first by asking Why? And then you move out to the how and the what.

Why means starting with your organisation's purpose but also looking at your Brand. Your brand is part to do with your logo and colour scheme but the more important, though less tangible part, is the Values behind the Brand.

Toyota has long been known for quality and reliability. When people think about The Body Shop, you think of their work and values in protecting the planet and not testing on animals. When you think about Apple – you think innovation and simplistic design.

What do people think about when they think about your brand and organisation?

Brand starts with the organisation values and the 'why' – why your organisation exists. After establishing that, do you have a consistent visual style for your brand – colours, shapes, fonts? Is it used consistently? If you have a tagline or slogan, does it accurately reflect your unique products/services? Is your signage up to date and easily recognisable at a glance? Are all of your physical assets consistently and distinctively branded across everything that a customer might see, including vehicles, uniforms, and premises?

After knowing the WHY, you can move out to the HOW which includes your positioning and target markets; and then the WHAT which gets to the marketing activities and tactics.

Slide 22

It helps when building your marketing strategy, to think about the objectives for each of the target segments. We will talk about activities in the marketing plan next, which is how you go about achieving the objectives.

What are the goals (or what are you trying to achieve) from the marketing activities? Ensure you include activities related to the launch of any new programs/services as well as ongoing new clients to existing services.

Writing out your objectives is a way to define your goals for each target segment – and relate these back to the overall business' strategic objectives and strategic plan.

Too often, organisations end up writing objectives that are sweeping statements which are impossible to measure against. Using the SMART acronym will help create a better objective which can be measured.

This means having objectives that are: Specific, Measurable, Achievable, Relevant, and Time-bound

Slide 23

The table here is included in the Activity worksheet which you can use to develop your own marketing objectives.

For example, with the target segment of people aged 24-55 with a psychosocial disability in a particular location, you might want to reach 100 potential new customers with an aim that five of them enquire about a new service.

Slide 24

Our next topic today is to look at the marketing plan – and we will include talking about the marketing budget.

Slide 25

Stepping back before we dive in to the marketing plan.... The steps to building a marketing plan involve understanding the market that you are operating in (we discussed this in webinar 2), the strategic plan for the organisation (you may have an existing strategy, or this could be built up using the Business Plan template provided through this program on the NDIS Success part of the CBB website), your marketing strategy (brand, target segments, objectives) and now we are going to look at the P's in the **marketing mix**.

Your **Product** (or service if you are a service based business) was the subject of the third webinar where we worked through the design of your service. This includes the: resources, systems and processes, technology, setup costs, ongoing costs and capital expenditure. You should think about this product or service both in terms of what existing customers want (what makes them happy and come back again and again), and what new customers might want.

The maximum **price** is set by the NDIS Price Guide. The NDIS also set the categories and structure around which you structure your services and price charged. If you need a reminder or more information about this, then please go back and review webinar 4 (Quality, Compliance and Risk). The NDIS intend that at some future point in time, they will do away with the price guide and allow providers to set the price themselves so you might also want to think in future about what you would do in future if/when the price list ends.

The **place** where you deliver services was also a part of webinar 3 (Service Design), and to a lesser extent we also spoke in webinar 2 (Understanding the market) about how you might consider expansion options, for example, based on geography. Place includes how to get your product or service to your market and how people can buy it.

So you will see from this, that we have already thought a lot about the elements that make up your marketing mix as part of all the different webinars – and the place we started from was in Understanding the Market – to ensure that your NDIS services are what your existing and future customers want, and are not in an area already saturated by the services of competitors.

We will speak more about **promotion** shortly.

Explanation of funnel

1. Reach your target audience (potential customers) with your message, brand, value proposition – NDIS provider list, advertising, direct marketing, digital marketing, social media etc. You need the right mix of paid, owned and earned media to drive a response, and a clear 'call to action'.
2. Engage your target customer. The customer reacts in some way to your message e.g. click ad, visit website, sign up for e-News, register interest, share your message.
3. Enquiry – a prospective customer decides to reach out and make an enquiry – could be phone, email, walk into office, face to face in community or via social media.

-latch onto that prospect the instant they make contact – treat them like gold from the very first interaction

-give the prospective customer a surprise/delight 'moment' during the initial interaction

-even if they don't reach the 'propose' stage, make sure you have a system to maintain regular contact with them in case they are simply tardy, or not happy with the service they chose

4. Propose a solution for the prospective customer – provide a quote
5. Sell – convert from a prospect to a paying customer – execute service agreement and conduct on-boarding activities.
6. Retain

-deliver (or over-deliver) on your proposal to ensure customers stay with you

-cultivate the relationship and let the customer know how appreciative you are of their business

-aim for the customer to stay with you for their life-time (dependent on your service and target demographic), or at the very least, for the

-up-sell to other services – via partnerships with complementary providers if it's not your core business – repeatable 5-step process in some cases

Slide 26

These elements that you can draw on in the marketing plan are known as the **Marketing Mix**.

Like an iceberg, some of the marketing elements are more visible above the water than others.

Customers or potential customers will see and notice some aspects of your organisation more easily than others.

The marketing mix includes your:

- Promotion – how you advertise and promote the organisation: for example, website, public relations (e.g. newspaper and media), advertising, signage and word of mouth.

- The Product – what the customer gets which is the tangible product or intangible service
- The Price – what it costs and the way in which customers pay.
- The Place – where and how you can get the product or services.

Like the iceberg, the visible parts of what we often think of as marketing can only be done well if you have the marketing strategy and plans in place, otherwise you risk wasting resources with poor messaging to the wrong people.

Slide 27

Place involves where and how you deliver the services – it might be at your location, rather than driven by the NDIS participants home.

Place also includes how the service is purchased. Is it exclusive to NDIS participants or is an NDIS plan just one way to pay for it?

Is this a direct purchase? i.e. is the user of the service or their guardians going to purchase the product, or will the product be made available through third parties such as another disability service provider with complementary services?

Slide 28

The next P is Price.

If you are a registered provider, then the maximum prices you can charge – and the structure of how you charge – has been set in the NDIS Price Guide.

It is worth thinking at this point in setting up the new service about what you would do if there was no longer a price guide in place and price caps are lifted. The NDIS have spoken about their intentions to do this when the market reaches maturity, so you should have a plan for this.

Likewise, with continual changes to the Guide and pricing, it may be that previously nonviable services you want to provide could become viable.

Slide 29

The next P is Product. This is where the research we talked about in webinar 3: Service Design will help you, so if you haven't watched that already please go back and watch that webinar.

In summary, look at the 3Cs of the product:

- What do **customers** want or need?
- What wants/needs do **competitors** already meet – where are the gaps in the market?
- What are your core **competencies** – which services can you deliver and deliver them well?

Slide 30

Below the surface, are the:

- People: who you serve and what they need; and the
- Purpose: which is why the organisation exists. We've talked about the vision and mission before and this is the purpose.

You also need to understand your Position in the market, relative to competitors and other options that the customer has. We discussed this in the second webinar Understanding the Market when we looked at a Competitor analysis.

Slide 31

A marketing plan that works relies on: understanding the customer context, your competitors and competencies – this was part of webinar 2.

It also involves Strategy which is about your people, purpose and position. We've talked about the service design which involves your people and market position within webinar 3.

And then when it comes to marketing, there are different marketing tactics as part of the marketing mix with: product, price, place and promotion. You can think about these each as levers to pull on to market and grow your NDIS business.

Slide 32

In looking at an example, let's think about a (hypothetical) business in Central Queensland that is focused on providing support coordination services.

The Product is that this provider is focused on delivering support coordination services within the Central Queensland area. Given the relative small size of the market in this regional area, they have decided to be a generalist provider to people living with any form of disability rather than being specialised based on one particular type of client.

The Price is set by the NDIS Price Guide at about \$98 per hour. There are several different categories of service but all at this same price point.

The Place or places are that there is an existing office in Rockhampton and a new office in Gladstone. As part of following these webinars through, the organisation has identified a growth opportunity to build their business in to another regional town in Mackay.

Now with Promotion, the organisation is focused on consolidating its strong position and growth in Rockhampton, and positioning for new growth in the Gladstone area. Rockhampton office's strategy involves building partnerships with potential referral agencies. In Gladstone, there is a focus on some Facebook ads and boosts of posts which targets residents in and around the town who have interests on Facebook that relate to disability and disability services. In future, the organisation wants to have a business in Mackay and so

is just starting to do some work to build brand awareness – through a newspaper editorial on a successful client experience.

You can see from this example, that there might be different priorities and focal areas as part of the marketing mix and promotion – let's now dive a bit deeper in to this subject of Promotion.

Slide 33

Your marketing plan involves bringing together these P's: Product, Positioning, Price, Place, Promotion.

After identifying what's in the marketing plan, you need to figure out how much it will all cost! Some of this we will think about in the financial sustainability in webinar 6. But at this stage, you will want to start to build up a marketing budget.

Creating a marketing budget is identifying an estimate of the expenditure that you will need to make on marketing activities in order to achieve the marketing objectives that support overall business objectives.

CBB wrote an article in one of our Foreword blog posts recently about How to create a marketing budget – so you might like to look this up on our website.

Slide 34

Coming to an example here...

List out the key activities you are going to do in order to promote the organisation to potential new clients. Make an assessment of what you think each will cost and include that in the table as well. Some may be a one-off cost (that can be included in the Sub-total column), and others might be something you do on a monthly or quarterly basis, such as advertising.

Following our previous example, we might estimate that to run campaigns on Facebook to boost posts with an aim of attracting new clients will cost us \$200 each time with a plan to do so quarterly and an annual budget of \$800.

Slide 35

The next section of our webinar is focused on Promotion – which is a key area of marketing, and an element that many disability focused businesses did not have to think too much about prior to the NDIS.

Slide 36

From an organisational perspective, the activities you perform need to take potential customers from a place where they might not have even heard about you to a place where

they become clients, repeat clients, and hopefully even refer their friends and family to become your clients too!

Thinking about this from the (potential) customer's perspective – they need to go on a journey discovering more information about you/your organisation, whether they can trust you, and ultimately in getting to a point of making a decision to do business with you.

In thinking about this journey, it can be helpful to think of this process like a funnel.

Just because someone calls your office to enquire about a service doesn't guarantee they will end up using your services or becoming a regular customer. Depending on your business model, you might need five or 10 such enquiries before you end up with a new customer. In other words, it might take 5 or 10 potential clients at the top of the funnel for one to fall out the bottom and become a client.

Explanation of funnel

1. Reach your target audience (potential customers) with your message, brand, value proposition – NDIS provider list, advertising, direct marketing, digital marketing, social media etc. You need the right mix of paid, owned and earned media to drive a response, and a clear 'call to action'.
2. Engage your target customer. The customer reacts in some way to your message e.g. click ad, visit website, sign up for e-News, register interest, share your message.
3. Enquiry – a prospective customer decides to reach out and make an enquiry – could be phone, email, walk into office, face to face in community or via social media.

-latch onto that prospect the instant they make contact – treat them like gold from the very first interaction

-give the prospective customer a surprise/delight 'moment' during the initial interaction

-even if they don't reach the 'propose' stage, make sure you have a system to maintain regular contact with them in case they are simply tardy, or not happy with the service they chose

4. Propose a solution for the prospective customer – provide a quote
5. Sell – convert from a prospect to a paying customer – execute service agreement and conduct on-boarding activities.
6. Retain

-deliver (or over-deliver) on your proposal to ensure customers stay with you

-cultivate the relationship and let the customer know how appreciative you are of their business

-aim for the customer to stay with you for their life-time (dependent on your service and target demographic), or at the very least, for the

-up-sell to other services – via partnerships with complementary providers if it's not your core business – repeatable 5-step process in some cases

Slide 37

If you want or need to use the media to reach your potential customers, then think first about what type of media will be most effective (in terms of return on investment) for you.

PAID promotion is advertising in all its forms. You pay to control the message and to whom it is sent.

OWNED promotion is the communication you control directly. Your website, product experience, staff, vehicles all communicate.

EARNED promotion is all the communication you cannot control. It's word of mouth and journalist publicity, including your influencers.

All three kinds have a place. Without Paid media it's hard to reach enough people; without attention to Owned media the people you reach might not turn into a sale.

If you fail to properly set up channels to encourage people to share information and generate Earned media, then you miss an opportunity to grow your reputation and perhaps gain extra reach too.

Slide 38

In reaching your target audience of potential customers, it is best to start off by looking at all of your existing assets that can be used.

It's really important to think from your customer's perspective not the media perspective. If you know what problem you are solving, suddenly you have a whole world of things you can use to connect with them. (reveal remainder of list)

Before you get to looking at what advertising options you would do I'd recommend having a look at what assets you have so you can try and use as many assets as possible – effectively and efficiently – before needing to spend money on media.

Your assets include:

Marketing – Collateral, Website/Platforms, Advertising, Content

Brand/product – Reputation, Awareness/value, Product/service experiences

Physical – Space, Merchandise, Vehicles, Office

Intellectual – Professional know how, IP, Customer knowledge, History, Content

Human – Staff, Customers, Champions/spokespeople

Partners' assets – Collaborators, Competitors, Funders, Media

Slide 39

In looking at an example, let's think about a (hypothetical) business that is focused on a particular type of acquired disability. The organisation is well known as a reference point when people are first diagnosed with this disability and so many potential customers come to them at this point in their life journey. However, they don't always stay long term as a client meaning that the organisation now has a database of 1,000 potential customers but only 300 are using existing services.

Besides the database, the organisation has some other existing assets with a contact centre, quarterly newsletter, website and good followings on social media channels.

They have two target audiences: firstly the existing customers, and then need to find a way to reach out to the 700 people living with the type of disability that the organisation is focused on, but who are not well engaged.

Potential customers usually need to hear about your organisation a number of times before they will purchase services from you. They also want to know they can trust you and build some relationship – finding a way to connect with the 700 potential customers through the social media and newsletter would ease them back in to knowing your organisation, build trust and likely develop new customer transactions.

In this organisation's case, I would suggest it is pointless focusing on a paid ad buy when you already have a good idea who the potential customers are through your database. Utilising the contact centre or reception/admin staff to reach out and check contact details would be a more cost effective way to build new customers than paid media.

You can see from this example, that there is a need for a number of different marketing activities to better utilise existing assets.

Slide 40

And now our final section – the customer journey and experience.

As we speak about the customer journey and experience, you should think about this in the context of the previous webinars and the whole ethos of NDIS.

The NDIS is about giving individual participants choice and control over their needs/goals and the services they buy. Instead of the old model of block funded organisations helping individuals, the NDIS has the participant as the customer with the power to choose a provider that best suits them.

To be successful in the NDIS business model, you need to understand your customer segment/s, including what's important to them and what they value about your service (and it may not be what you think it is). You need to be customer focussed – having person centred approach about meeting the participant's goals, not about what's operationally convenient for you as the service provider.

Slide 41

It is important to consider the customer experience as this will contribute to customer retention and your brand reputation. This includes every step of the way from when they phone you or come in to your office, to how the service is delivered, to how it is invoiced after.

Making sure that the customer experience meets the marketing promise is so important – and sets the basis for customer satisfaction, or otherwise.

With low utilisation rates for NDIS plans across the country – and even lower in regional and remote areas – there remain strong opportunities for organisations to achieve growth simply by providing more of the same services to existing customers in spending a higher proportion of their plan. It makes sense, therefore, that a satisfied customer will continue coming back to your organisation to ensure that they max out the services that they can get from you within their NDIS Plan in support of their disability and goal achievement.

Some strategies to help keep existing customers happy include to:

- deliver (or over-deliver) on your proposal to ensure customers stay with you
- cultivate the relationship and let the customer know how appreciative you are of their business
- aim for the customer to stay with you for their life-time (dependent on your service and target demographic)
- Focus on an end to end customer experience from onboarding through service delivery to transition from service – making sure you are hearing the voice of the customer (more than cultivating and appreciating)
- up-sell to other services, providing additional value to them.

Slide 42

You can have all the right systems and processes in place.... But it is still up to people to implement these!

You can build a customer centric culture by:

- Recruiting for customer service values

- Measuring/reporting customer service indicators
- Integrating into performance management and role modelling the right behaviours.

As one of my managers said some years ago, “every role in the company is either directly working with customers or supporting someone else who is”. Defining all roles in terms of the customer creates a conscious focus on the impact of a process or system change on the customer experience.

Slide 43

The picture on screen is an example of how you can do a Customer Journey Map. This model shown comes from an organisation called *Designabetterbusiness*, and they have other examples on their website of other different models you can use to analyse other elements of your business. There is a link in the Activity worksheet to this model so you can find out more.

To use this model...

1. Persona – Start with defining the Customer Personas that you are creating the journey for. Be specific (e.g., name, age, occupation, skills, interests). This should be the same as your target market and audience – that is, work and thinking you would have done in watching Understanding the Market webinar 2.

2. Touch Points – What are the different moments of interaction with the customer (e.g., in your office/medical suite, a customer’s home or group at a community centre, online, via webinar, by phone, mail, or in service agreements)? Some moments may be important to the customer, but are currently not touch points: map these moments as well! The customer is the primary focus.

3. Mood – What is the customer’s mood at that very moment? Are they happy, frustrated, angry? What in the moment makes it so?

4. Timeline and Stages – Define at least 5 moments in the journey. What is the step-by-step experience for the customer? Start from their initial inquiry to your organisation, your intake process, getting to a signed service agreement, service delivery and invoicing afterwards.

5. Customer Needs – What is the job the customer wants to get done in each of the stages? For example, if your customer seeks to identify the company they want to work with, we need to understand the various touch points. What are the questions customers have at each point?

One option is to have someone actually go through key points as a customer (either mystery shop or role play) – and you may find unexpected frustrations e.g. form filling.

You might like to think of some of the ‘invisible’ touchpoints as well, e.g. interacting with any online systems, completing forms etc.

Slide 44

The customer journey map provides insights into how customers experience a product or service, as well as how they might be better served or even delighted.

Customer journeys are not linear. A customer can jump from one phase to another. The process can be used to identify where customers get stuck, where they have great experiences, and why.

It helps to look at products/services, and your organisational processes, through the lens of the customers.

One outcome of writing out a customer journey will be to identify quick wins to act on immediately.

The customer journey is relevant for everyone in the organisation. Everyone on the team, and in your company, must understand what your customer's experience: how they feel, what they struggle with, and how you can improve the experience.

Slide 45

We can apply the example of a customer journey map for a speech pathologist practice which is an unregistered provider. In this example, we consider the customer as a self-managed NDIS participant who is seeking the speech pathologist services.

The participant (customer's) touch points with the organisation might be to: make an enquiry and booking via the website, then enter the speech pathologist's office or medical suite, receive the services, get the invoice and make payment before leaving.

When enquiring and making a booking via the website, the customer needs up to date information, knowledge that the NDIS services can be provided and timely responses to the requests.

When arriving at the speech pathologist, the customer needs accessible parking, a friendly reception including somewhere comfortable to sit, and a short waiting time.

In receiving the services, the customer wants to be listened to, have choice and control, and receive a quality service.

After the service, the customer needs to pay, and so will require an accurate invoice and details of how to pay.

Slide 46

All NDIS providers need to have a complaints management systems in place, no matter if they are a registered or unregistered provider – this was part of what we included in Webinar 4 (Quality, compliance and risk). The complaints management system needs to be:

- relevant to supports delivered in your registration group
- compliant with NDIS Complaint Rules 2018 and follow principles of fairness and natural justice
- relevant to the size and scale of the provider & scope and complexity of supports
- accessible, advice on access to advocates, and how to complain to the NDIS Commission

Whilst this is an important part and relates to times when a customer has a bad experience, many providers have also found value in having a broader customer feedback system which is customised to your organisation, and can be used to provide feedback on what is working and what needs to be improved.

Maybe you already have an NDIS complaints management system and other forms of customer surveys and are thinking about how to further improve your customer feedback. In that case, I would suggest looking in to Net Promoter Scores as a more advanced way to measure your customer satisfaction over time. The net promoter score uses the question of 'would you recommend?' as the most significant single indicator of customer satisfaction. You could find more information about this model on the internet for examples of how it is calculated.

Slide 47

As we reach the end of today's webinar, we want to summarise the outcomes you should have reached if you have been following along and completing the exercises in the Activity worksheet.

Slide 48

We started out today looking at the marketing strategy in the context of and alignment to the business strategy.

We looked at the marketing strategy, marketing plan and provided an exercise in the Activity worksheet to start thinking about a marketing budget.

We spoke about your organisation's marketing mix and lead generation process to identify the gaps and shortfalls in your marketing process and ensure this is a smooth process for all new customers.

Under the NDIS business model, we have also seen how important it is to keep existing customers happy, nurturing them through the customer experience and journey.

Being successful under the NDIS involves growing new customers to replace lost ones and adding new ones if your plans are to grow.

Slide 49

So what should you do after watching this fifth webinar?

Please review the questions in this week's Activity worksheet and the Business plan template.

To find the resources and more please also visit the NDIS success tab on our website.

Please join the Facebook page and post a question or like a question so we know which questions to address first.

Slide 50

We trust that you have found value in today's webinar.

The Q&A session for Strategies for Success will be released on 6 October and we would value you contributing a question via email or the Facebook group.

The next webinar in the series is on Sustainability in the NDIS. In this webinar we will look at the financial sustainability of NDIS businesses.

The Sustainability in the NDIS webinar will be available on 13 October, followed by the Q&A session a week later on 20 October.

Slide 51

Thanks for watching our fifth webinar 'Strategies for Success'.

Bye for now.