JUNE 21, 2022

AGENDA ITEM 6
INFORMATION ITEM

CALIFORNIA ABLE ACT BOARD

CalABLE Marketing Plan Update: Program 11

Information Item

Background:

The California ABLE Act Board will receive an update from CalABLE's marketing agency, Program 11. The update will include:

- An overview of 2022 and key accomplishments
- CalABLE marketing campaign

Attachments:

- Program 11 Marketing Update

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Program 11

CalABLE Board Update.

June 2022

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TIMELINE OF ACTIVITIES

JUL 2021

ENGAGED WITH CALABLE

DISCOVERY AND MARKETING PLAN

SEP-OCT 2021

WEBINAR REWRITE AND REDESIGN

SOCIAL MEDIA DAY TO DAY MANAGEMENT

NOV-DEC 2021

DELIVERED CAMPAIGN AND DISTRIBUTION STRATEGY

RAN HOLIDAY EGIFT CAMPAIGN

JAN 2022

RAN TEST ADS USING WE ARE CALABLE MESSAGING

BEGAN CAMPAIGN PRE-PRODUCTION

MAR 2022

COMPLETED PRODUCTION OF ALL ASSETS

RAN GEOTARGETED CAMPAIGN DURING ABILITIES EXPO LOS ANAGELES

APR 2022

KICKED OFF AUTISM TREE PARTNERSHIP DURING AUTISM AWARENESS MONTH

POST-PRODUCTION OF CAMPAIGN ASSETS

MAY 2022

ROLLED OUT CALABLE AMBASSADORS

PRODUCED 8 MINUTE "INSPIRE" ANTHEM VIDEO

JUN 2022

CAMPAIGN POST-PRODUCTION COMPLETE

SPECIAL OLYMPICS GEOTARGETED CAMPAIGN

JUL 2022

FULL CAMPAIGN ROLL OUT IN HONOR OF ADA ANNIVERSARY

Where we started

Product-Market Fit Research

1. CalABLE immersion
   - Program goals
   - CalABLE offerings and differentiation
   - Compliance and regulations
   - Strategic marketing to date

2. Audience research and identification
   - Goals
   - Pain points
   - Opportunities
   - Intersection of CalABLE offerings and audience needs

Identified audience opportunities

LIVING WITH A DISABILITY

PARENT/CAREGIVER

ADVOCATE/INFLUENCER/PARTNER

Conceptualized the “We are CalABLE” campaign

What we've learned

Partners are the flywheel

Direct to consumer (D2C) campaigns are one-to-one. Partner campaigns (B2B2C) are one-to-one-to-many.

The best bang for our marketing dollar is working to find and partner with the right organizations so we reach and harness their audiences.

ADVOCATE/INFLUENCER/PARTNER

We can use geotargeting to reach potential partners

We already have the tools to digitally target audiences by interest and affiliation.

We can use geotargeting – location-based advertising – to deliver targeted ads to people at physical locations.

We can give partners the tools to succeed

We determined the need to give marketing tools to partner organizations and allies to evangelize CalABLE to their own constituencies.

Their own audiences, because of our positive association and affiliation with these trusted organizations, share CalABLE with their own networks. The flywheel effect.

What we’ve done

We partnered with Autism Tree as a pilot program

- About the organization:
  - Autism Tree (ATPF) assists with mentoring, advocacy, research, education, and screenings for families impacted by autism.
  - For 20+ years, it has offered programs and services that are designed to engage children with autism.
  - Their early Intervention Preschool Screening Program has provided screenings to 20,000+ preschoolers in San Diego County and the Bay Area.
  - More than 6,500 people are served by the organization yearly.

We worked with Autism Tree to identify needs and create our first toolkit

The assets included:

- Email marketing (copy and image for a dedicated announcement)
- CalABLE sponsorship inclusion in each newsletter (blurbs, links, and images)
- Ambassador stories in each newsletter (blurbs, links, and images)
- Social content and cross-promotion (images and approved text)
- Custom webinars (hosted at their Lunch and Learns)

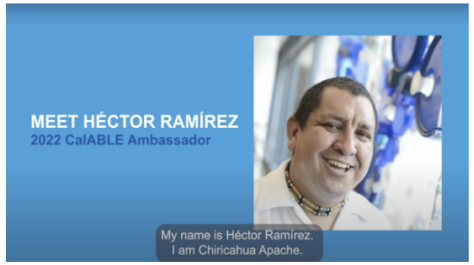
THANK YOU TO ATPF LUNCH & LEARN SPONSOR: CalABLE

CalABLE is a groundbreaking financial and investment state program that helps you save money – tax-free – to pay for disability-related qualified expenses. Anyone whose disability occurred before age 26 is eligible to open a CalABLE account.

Meet the 2022 CalABLE Ambassadors; each Ambassador shares their own story and CalABLE experience.

Hector Ramirez
Hector Ramirez, who is an adult with autism, hearing loss and a psychiatric disability. Héctor shares his story about how he was able to use the funds in his CalABLE account to purchase a mobile home.
Watch here: https://bit.ly/3PmbI5M

Stephen Bell
Stephen is a father to Bradley who has autism. Stephen shares his story about how CalABLE helps Bradley pursue his goal of independence.
Watch here:
https://bit.ly/3I8UhYU



Now that we have a system, there are many more partners to approach

- 150+ State and Regional partners identified in California
- A dozen potential California-based corporate partners include Access Adobe, Google's Othering and Belonging Institute, and Oracle's Embracing Diverse Abilities initiative
- Social and allied organizations include the Disabled Techies Slack Channel, the Blind Institute of Technology, and Illimitable.

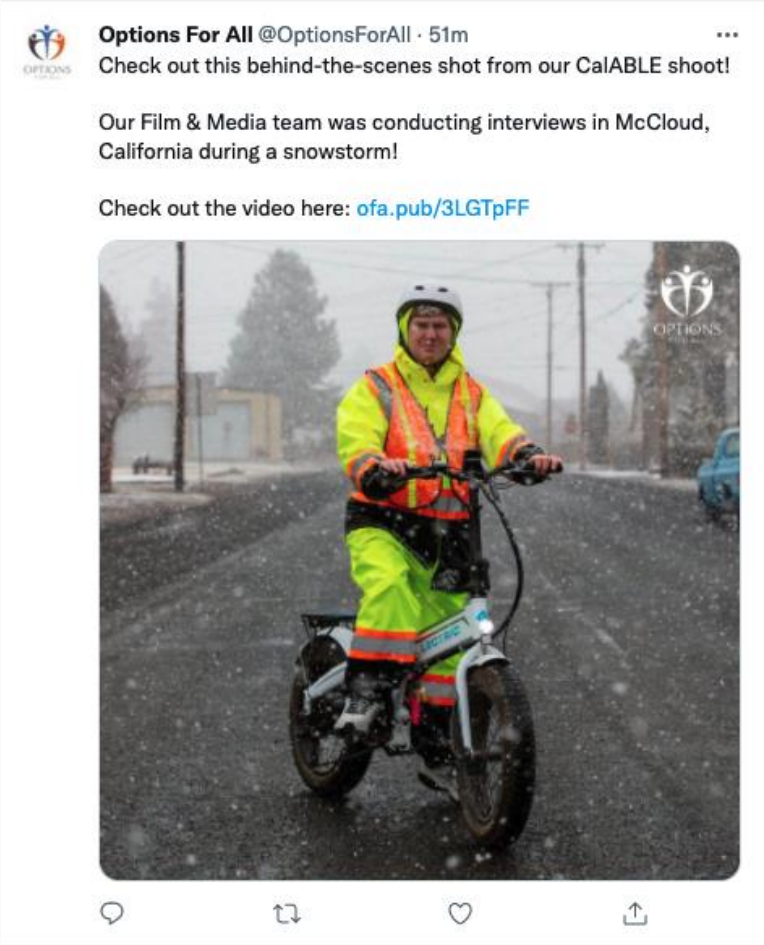
We can share our list and welcome your input on any additional organizations that we should focus on.

We're expanding our pilot and creating multiple partner toolkits

- Developed an **outreach plan to reach allied organization**s and partners to amplify messaging
- Developing a **toolkit for board members** to reach out to your networks about CalABLE and your work supporting the program
- Developing a **custom 30-minute workshop to train** influencers, ambassadors, and partners to help enroll the people they serve
- Working with CalABLE to create **"CalABLE Basics"** – a 20-30 minute version of the one-hour webinar for distribution by ambassadors, partners, and other advocates (potentially customized by partner type and need).
- Developing **handy printable resources** that partners and influencers can easily disseminate in person
- Scripting an **explainer video** for partners to share (in pre-production)

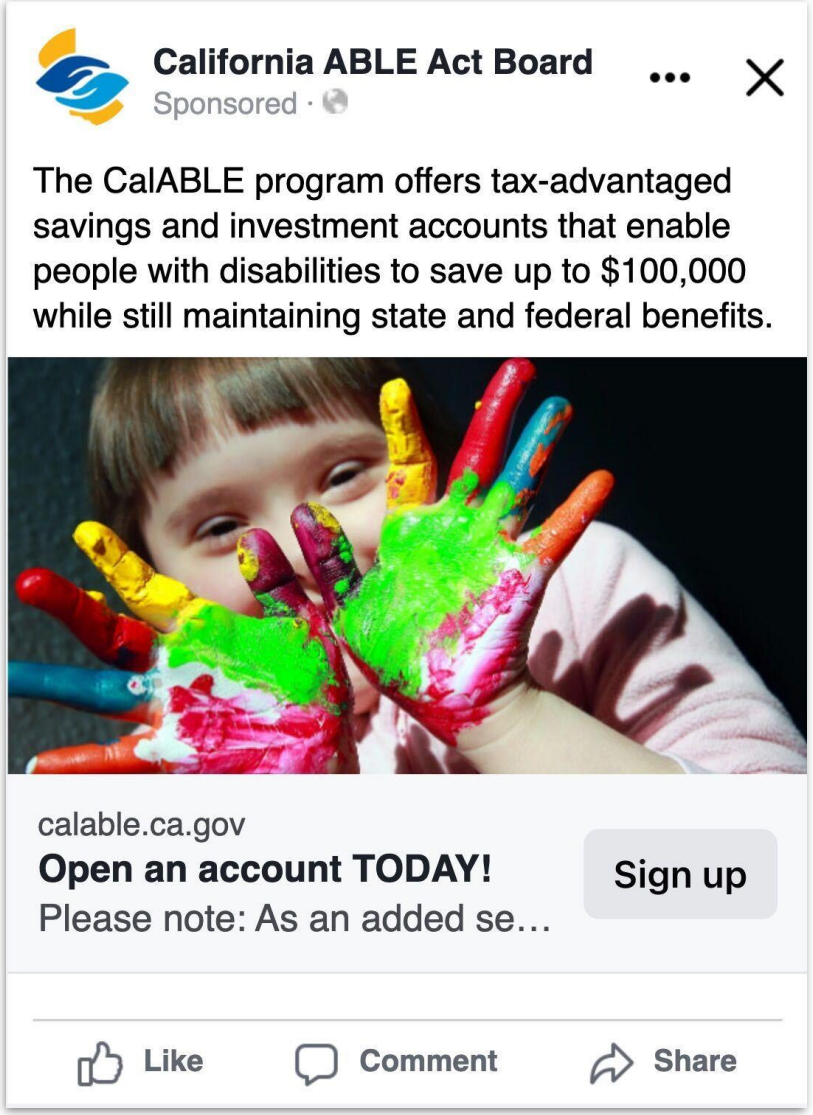
We're developing and previewing the We Are CalABLE creative assets

- Conducted a 4-day **video shoot**
- Developed a **distribution plan** based on content captured and audience opportunities
- Created a **master campaign 8-minute "inspire" video** with the following cut-downs:
  - Short social videos (15-30 seconds) featuring CalABLE account users
  - Short social videos (15-30 seconds) featuring family/caregivers of CalABLE users
  - Foreign language edits
- Developing **ads for social and programmatic media**



And we kicked off conversion campaigns

- Ran a **geo-targeted ad campaign** during the Abilities Expo (March 2022) in Los Angeles
- Running an **“always-on” social campaign** driving clicks and engagement to the CalABLE site
- Promoted all **9 Ambassador videos by boosting and encouraging re-engagement** for broader reach (including links to the sign-up page)
- Beginning our **programmatic ad push focusing on relevant websites** – targeting those living with disabilities and those who support them
- Developing a **lead generation campaign** to capture user info for webinars, newsletter signup, and potential deeper partnership.



By the numbers January - June 2022*

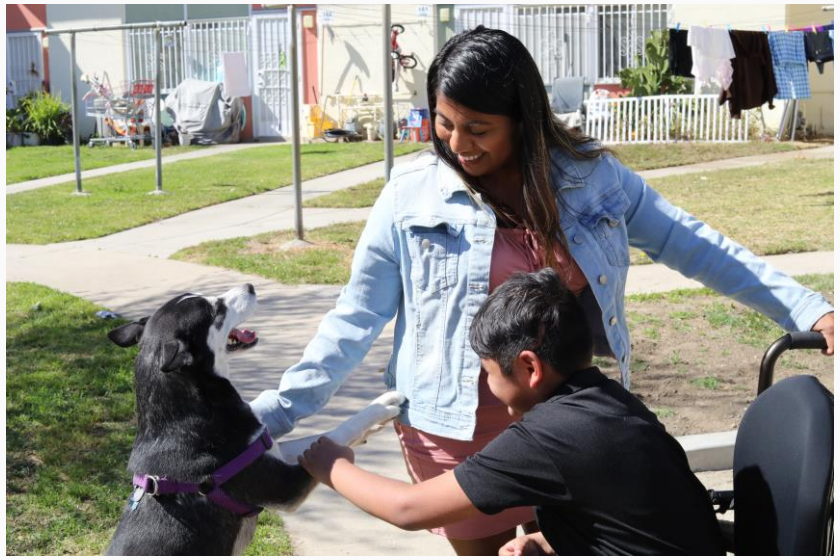
ACTIVITY AND ROI CHART				
Activity	**Cost / Investment (some earmarked through June)**	**# Reached / # Impressions**	**Engagement**	**Clicks into CalABLE****
Autism Tree Partnership	$5,000	5,542 weekly newsletter subscribers 15 lunch and learn attendees 4,471 social post reach	1,996 email opens weekly	149
Boosted Social Posts for 9 Ambassadors	$2,700	172,082	57,888	4,477
Holiday eGift Campaign	$1,480	15,053	835	488
Abilities Expo Geotargeted Social Campaign	$1,200	40, 312	503	245
“Always On” Demand Gen Social Media Campaign	$600	31,825	387	368
CalABLE Organic Social	N/A	34,442	1,516	N/A
Public Relations (via external affairs)	N/A	2,600 (total social impressions)	81	573 (email opens for press release)

*All reach, engagement, and results are through June 16, 2022 (our deadline to lock down this presentation for Board Review).

**Please note that we cannot attribute new accounts to any campaigns due to privacy restrictions. Although we can track clicks and engagement from campaigns and partners, user behavior and activity, once they have clicked on the CalABLE website (through the open an account process), is not trackable.

What’s next

In July, we are fully rolling out the We Are CalABLE campaign



- Full campaign plan to be distributed to team
- Launching the campaign associated with the anniversary of the passage of the ADA
  - Press release
  - Partnership materials for campaign
  - Paid media strategy activation
- Running a geotargeted “Open an Account” campaign during the Special Olympics in mid-June using some language and assets from the campaign

We'll work closely with TIAA and CalABLE on website navigation improvements

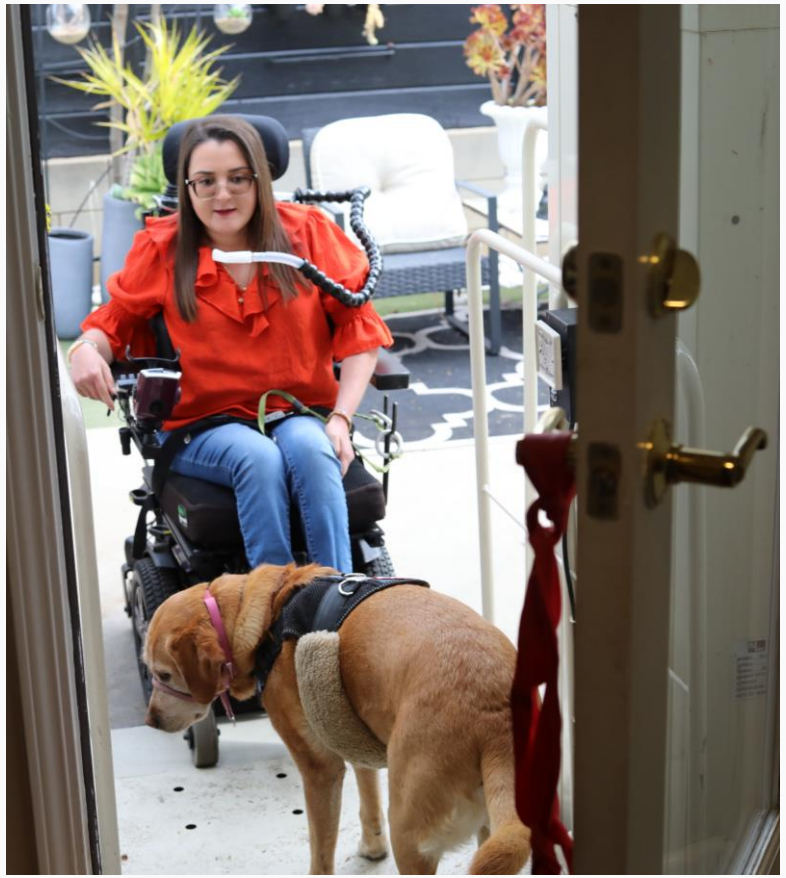
- Updating home page messaging
- Updating home page look and feel (what you see above the fold)
- Account enrollment navigation
  - Reducing the steps
  - Removing barriers
  - Clearer and more persuasive language

We’ll produce and distribute additional informational assets

- We’re developing a 3-5 minute animated explainer video
- We’ll develop additional digital and print outreach materials and resources requested and needed by the CalABLE team and TIAA

We'll continue lead generation efforts

- Begin nurture campaigns (follow up emails, outreach) based on feedback and data
- Identify and partner with influencers who can support and amplify our work
- Continue paid campaigns, broaden geofencing and retargeting to more organizations identified as potential partners
- Pursue earned media with stories that have developed from our work
- Analyze and measure performance and data, optimize



Top takeaways

The most impactful ways we are growing CalABLE:

- Partner toolkits
- Geotargeting and interest-based paid advertising
- Lead generation and retargeting over time

Thank you.