OCTOBER 4, 2022

AGENDA ITEM 6
INFORMATION ITEM

CALIFORNIA ABLE ACT BOARD

CalABLE Marketing Plan Update: Program 11

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

Presenters

- Miriam Bookey, Head of Strategy, Program 11
- Kelly Doherty, Program Manager, Program 11
- Kathy Brannigan, Director of Marketing, National Disability Institute

Attachments

- Attachment #1: Program 11 Marketing Update

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Program 11

CalABLE Board Update.

October 2022

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Overview of activities to date

Jul-Sep 2021	Oct-Dec 2021	Jan-Jun 2022	Jul-Aug 2022	Aug 2022	Aug-Sep 2022	Oct 2022
Onboarding, triage, research and discovery	Marketing plan development	Campaign filming and editing	Messaging tests, partner toolkit development	Anthem video and campaign launch	Paid media pilot	Partner toolkit campaign

Who we are

Program 11 is CalABLE's marketing partner. **We are a research, strategy, and creative agency based** in Los Angeles with an extensive background developing content and campaigns for both the healthcare and the financial sectors.

In order to best serve CalABLE and its audiences, **we partnered with National Disability Institute,** the first national nonprofit organization dedicated to building a better financial future for people with disabilities.

Together, **we are charged with growing awareness and adoption of CalABLE** among those nationwide who are eligible to open an account.

Where we started

1. We performed research and discovery to better understand **our audiences.**
2. From our research, **we identified partners as the big opportunity** for growth.
3. We defined partners as those who **support and advocate for the disability community.** If we reach and educate partners about CalABLE and its benefits, **they are much more likely to convince someone who qualifies** for this program to enroll.
4. We **presented our marketing plan** to the board in November of last year.
5. We **began developing our inbound marketing campaign** in January of this year.

What we've done

Signing up for a CalABLE account is a decision that requires persuasion and trust, so we needed to design and execute a plan that was equal parts informational and emotional.

1. We **defined audience needs and pain points** and the messaging and content that will reach and engage them.
2. **We created a campaign tagline and approach** aimed to build community and emotional connection: We Are CalABLE.
3. We **filmed 11 CalABLE account holders** and their families telling personal stories of financial inclusion.
4. We **produced a heartfelt 6-minute anthem video**. It includes an introduction from State Treasurer Fiona Ma and a closing statement from Executive Director Danté Allen.
5. We **created a plethora of campaign assets** including social-ready cutdowns, testimonials, and image and text shareables.

Launching the campaign

We timed the campaign to launch in August – #AbletoSave month. We developed the copy, social imagery, and an accompanying “how to” guide to launch the campaign across the following channels:

- Nationwide media outreach with a press release and media alert
- CalABLE social media
- Danté Allen’s social media
- Fiona Ma’s social media
- CalABLE quarterly Newsletter
- State Treasurer’s Office social media and website
- Ambassadors’ social media
- Partnership orgs’ social media, newsletters and other digital marketing (e.g. Options For All, Autism Tree, National Disability Institute, Program 11)

Amplifying the campaign

We wanted to ensure our paid media efforts were as efficient and effective as possible.

1. We **updated the "Open an Account" page to be a one-stop-shop**, with new copy designed to help anyone clicking to the site from our campaign.
2. We **produced a suite of digital ads** with taglines and messaging targeted to partners as well as individuals, with the call to action driving to open accounts.
3. We **ran a test ad to those who attended a Special Olympics in Northern CA** using Venue Replay – a technology that allows us to reach eventgoers after an event.
4. We then identified and gathered addresses of partner organizations, **pinpointed wifi and cellular networks tied to these street addresses**, and targeted computers and phones connected to these networks with our ads.
5. We **ran a pilot campaign to see where we're getting the most activity.** We will optimize the campaign to the most responsive IP addresses in the next phase.

Campaign results (Jul-Sep)

Channel	# Reached Total	Clicks to CalABLE
Paid Social	291,363 impressions 184,799 people reached	2,549 link clicks 0.9% link click through rate (CTR)
Ad Test - Venue Replay Geofencing (Special Olympics)	100,965 impressions	181 clicks, 0.2% CTR
Ad Campaign - IP Match	336,657 impressions	623 clicks, 0.19% CTR
Autism Tree Partnership	100-120 anticipated Lunch & Learn attendees over 7 events 4,516 total reach for Facebook posts 366 total YouTube views on recordings 2,000+ weekly newsletter views	
PR	Press release got pick up from 340+ publications (national, including Yahoo Finance, AP, and a number of financial pubs, plus news stations) Potential audience more than 208 million (take with a grain of salt)	

What’s next

Campaign optimization for holidays and events

We will continue to run the campaign, optimizing the ad copy and distribution methodology, with additional spend to reflect the following pillars on the calendar:

- Health awareness days and months (Autism Awareness, Mental Health Awareness, etc.)
- DEIB awareness days / monthly themes
- National events related to disability (Paralympics, Special Olympics, etc)
- Financial inclusion opportunities (times of year when people are spending money)
- eGifting opportunities (graduation, holidays, other)
- Events by state (Abilities Expos, conferences, conventions, institutes, film festivals, etc.)

Production and distribution of additional informational assets

We will continue to optimize the current suite of ads, and add the following creative assets to the mix to support persona needs:

- Partner toolkit for digital and physical distribution
- Full development and roll-out of a 3-5 minute animated explainer video
- Additional educational cut-downs of our video interviewees
- Development of additional digital and print outreach materials and resources requested and needed by CalABLE team, TIAA, and other partners

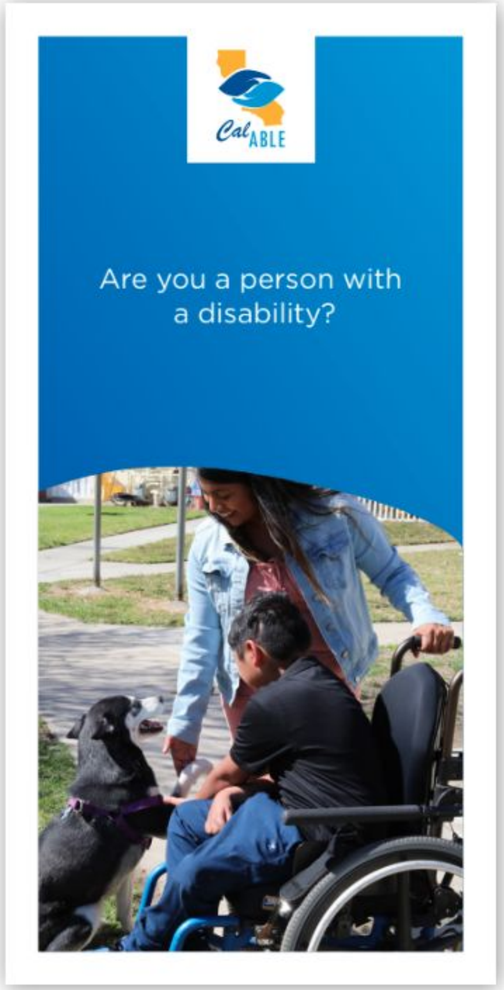
Continue lead generation efforts

Our campaigns will continue to evolve with the data we glean from each ad set's performance. Future efforts will include the following:

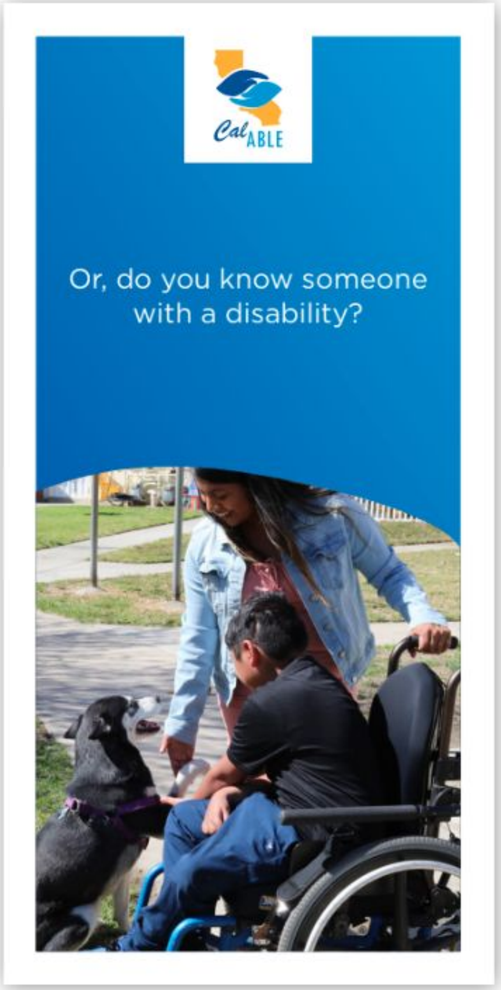
- Nurture campaigns based on response metrics
- Influencer campaigns and partnerships
- Broadening geofencing and retargeting to the organizations identified as potential partners, and retargeting visitors to specific pages of the website
- Garnering earned media with stories that have developed from new campaign launch
- Optimization based on campaign performance

Bonus: Campaign Creative

Campaign creative



SLIDE 1



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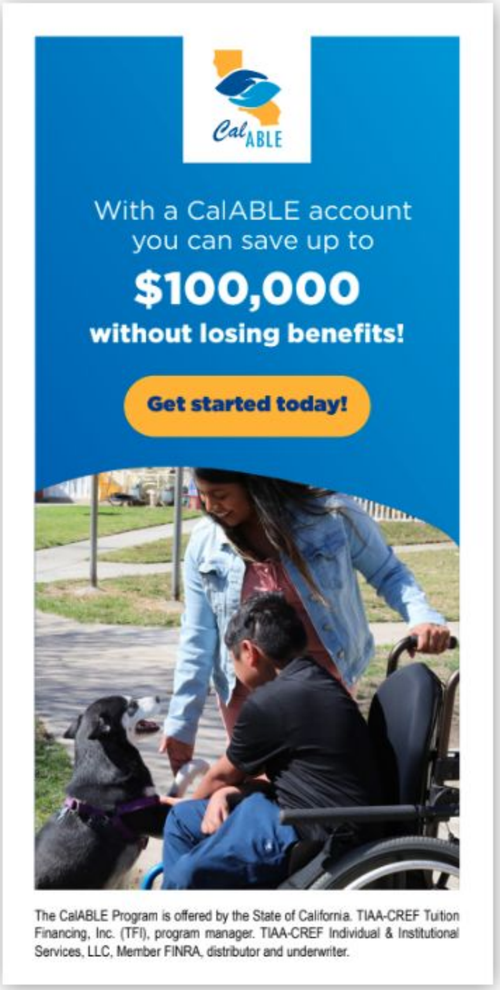

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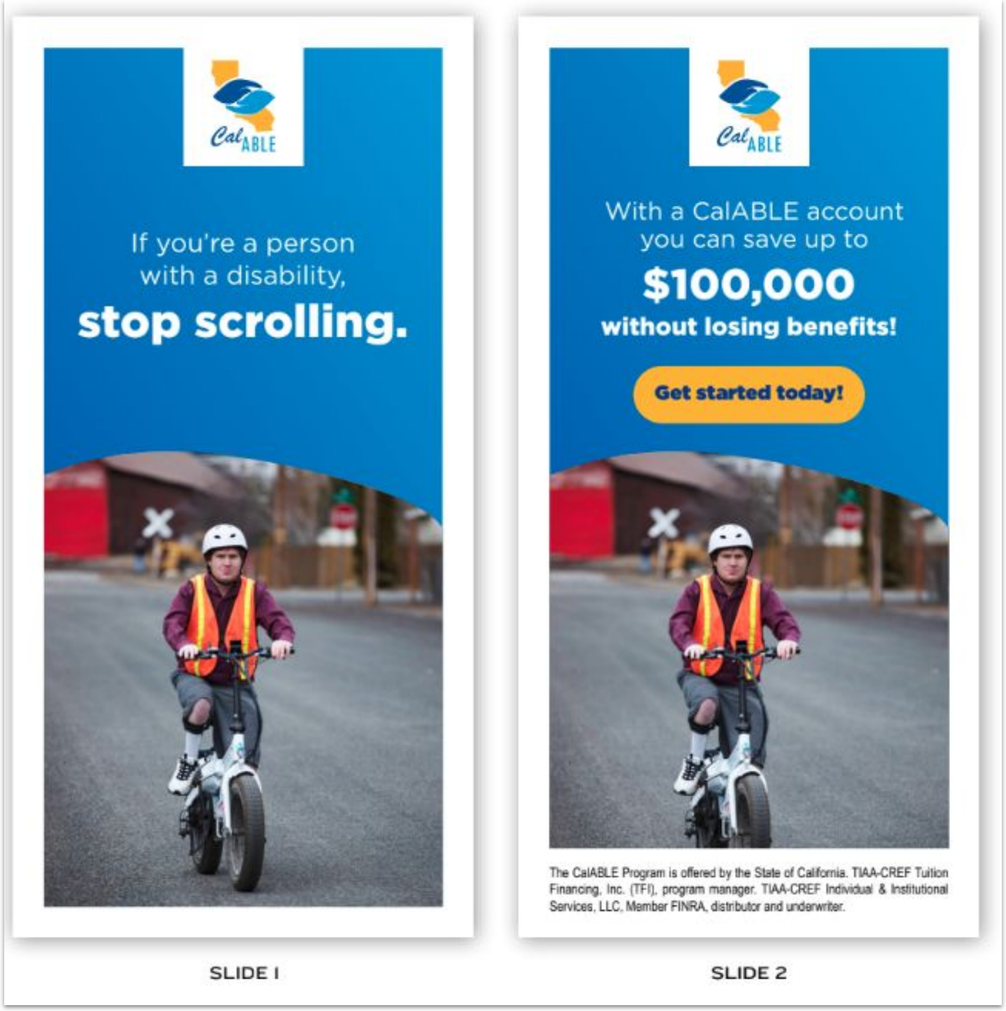
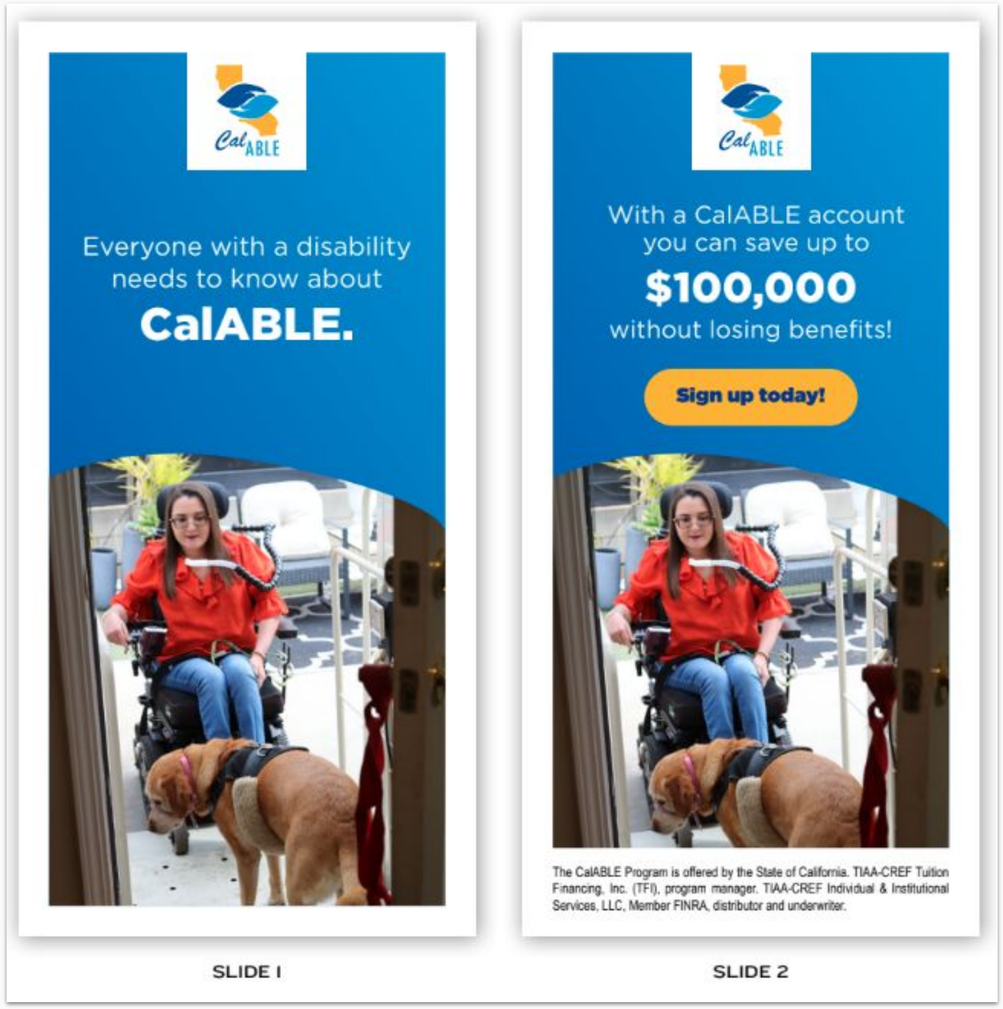
Campaign creative





Campaign creative

Videos to be played during presentation

Thank you.