



# Celebration & Promotion Guide

[cmsa.org](https://cmsa.org)

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CASE MANAGERS, ARE YOU READY?

**LET'S CELEBRATE**

National Case Management Week is October 9-15, 2022. It is a time to celebrate YOU, our field, and the progress we have made together. This past year, our field has been challenged to step up and because of you we are on our way to setting the standard for patient-centered care.



*October 9-15, 2022*

**National Case  
Management Week**

*Setting the Standard for Patient-Centered Care*

What does that journey look like for you? What accomplishments and aha moments have emerged from coordinating care and elevating patients to the best version of themselves throughout their health journey? What gaps have you bridged as you orchestrate sometimes impossible care strategies that require alliances with other healthcare professionals, agencies, and industry partners? We want to hear it! Leading up to and throughout CM Week, we invite you to share and engage with the entire CMSA Community in the following ways:



**Let's be friends!** Like, share, and tag CMSA National on **Facebook** here:

<https://www.facebook.com/cmsanational>. We will be looking at the chapter Facebook pages and doing the same!

Also, you can follow our CM Week Facebook page here:

<https://www.facebook.com/NCMWeek>

Remember to like, comment, repost, share information about your events, photos, proclamations are more!

**You tweet, we tweet!** Like, share, and tag CMSA National here: <https://twitter.com/CMSANational>.

Be sure to use the hashtag **#CMSACMWEEEK2022** when posting and tweeting!

**Use your voice!** Let's make CM Week 2022 more meaningful than ever! We invite you to encourage your chapter board and community members to create short video clips about what inspires you, what you love most about your field and what drives you forward. Share them on your local chapter social media platforms and CMSA National will share them on ours. One voice, one field, one association and one passion are what **#CMSACMWEEEK2022** is all about!

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# Celebrate National Case Management Week!

National Case Management Week is the 2nd FULL WEEK of October each year, beginning on Sunday and ending on Saturday. Through National Case Management Week, the Case Management Society of America (CMSA) hopes to educate payers, providers, regulators, and consumers about the tremendous value case managers bring to the successful delivery of health care.

The goal of National Case Management Week is to involve as many people as possible in the annual awareness celebration. Below are a few ideas to help get you started.

## IDEAS FOR CELEBRATING NATIONAL CASE MANAGEMENT WEEK

### *Individual Activities*

- Tell ten other professionals you are a case manager.
- Offer to speak about case management at community events & other organizations' meetings.
- Ask every CMSA member to wear a "Member Pin." The official member pin may be ordered through the CMSA National Office.
- Purchase promotional items for CM Week.

### *Employer Activities*

- Host a "lunch and learn" meeting for case managers.
- Display CM Week posters and banners in prominent places and have staff wear CM Week t-shirts and CMSA member pins.
- Profile case managers willing to share their stories in a company newsletter to raise awareness of the practice.
- Proclaim CM Week at your company and promote a different activity each week

during October, or each day during the week of Case Management Week.

- Encourage employers to purchase CMSA memberships for their case managers.
- Highlight different case management practice settings each day, such as acute care, work comp, rehabilitation, or elder care.
- Encourage local businesses to participate by displaying educational information and posters. Looking for some good templates? Check out [Canva!](#)
- Schedule an open house, offer free health screenings, health information and/or tours of your facility

### *Health Provider Activities*

- Recognize case managers as members of the healthcare team and teach them what they need to know to communicate more effectively with you.
- Honor case managers with a recognition day to show you appreciate how much they do for your patients.

## Community Activities

- Promote case management by sponsoring health fairs, conducting preventive health screenings in underserved areas, or organizing other services in your community.
- Work cooperatively with hospitals, nursing homes, employers and other community facilities to set up a special display for Case Management Week using promotional materials, such as pins, t-shirts, posters, etc.
- Host a celebration or reception to recognize a case manager in your community. Recognition could honor years of service to the community, exemplary acts of service, commitment to case management, etc.
- Host professional seminars and workshops for health professionals in your community.
- Arrange exhibits and displays in public facilities.

## Government Activities

- Encourage your mayor, county executive or governor to issue a local proclamation for National Case Management Week.
- Invite a politician -- local, state or federal -- to accompany a case manager or cm team at their place of employment, for a day or part of a day. Health care is a highly visible issue and important to all voters. This activity also offers a good opportunity for media coverage.
- Hold an event at the state capitol. Take the opportunity to educate state legislators about the role and value of case managers in the health care system.

## Social Media Activities

- Market Your Event Through Twitter - use a hashtag (example #CaseManagementWeek2022) in all your related tweets and encourage other people to do the same when talking about your event.
- Market Your Event Through Facebook - Certainly, you can update your status with news of your event, but don't overlook Facebook Events, a powerful tool of the platform. First create a page for the event, and then creating a "Facebook Event" from that.
- Promote business functions with LinkedIn Events to reach your professional network.
- Market Your Event Through Your Blog - Whether through an existing blog or a blog created specifically for your gathering, be sure to create posts announcing the event, following up with regular updates.
- Online Calendar Listings: There are many online calendars, and you should list your event in any that seem appropriate.
- Local papers, TV channels and radio stations' websites often host a calendar of events that offer free postings. Tweetvite is a site for promoting and learning about tweetups, and Eventful is one of many sites where you can list all types of gatherings.



## Professional Organization Activities

- Hold a case management trivia or bingo contest to educate employees.
- Honor case managers at a special recognition day.
- Decorate with banners, posters, flyers.
- Present awards to employees for outstanding service or contributions.
- Coordinate educational in-service training sessions.
- Publish special editions of corporate newsletters focusing on CM Week.
- Host a Family Resource Day, complete with workshops and community resource information.
- Build case management awareness through CMSA resources (to physicians, legislators, regulatory officials, etc.). For available resources, check out the CMSA website at [www.cmsa.org](http://www.cmsa.org), or contact the CMSA National Office at [cmsa@cmsa.org](mailto:cmsa@cmsa.org).
- Speak to nursing, social work and other organizations about case management careers.
- Invite a local celebrity (one who has spoken about health care in the past; one who has personally experienced case management services; or one whose family member has) and request his/her sponsorship of Case Management Week. Hold an event and ask him/her to speak about personal case management experience.
- Obtain support from allied health care organizations in your area by asking them to sponsor National CM Week and to host a joint event with your organization.
- Case Management – Stories that Make a Difference: Create a publication of case management stories. They are a powerful way to make case management real for

those who have not experienced it, either professionally or personally. To develop your own stories, contact other case managers management stories. They are a powerful way to make case management real for those who have not experienced it, either professionally or personally. To develop your own stories, contact other case managers through professional or personal affiliations to participate. Explain how you will be using the stories (to educate other physicians, payers, regulators, etc. about case management.)

## News Activities

- Contact local bloggers and ask them to help you promote local activities.
- Write letters or emails to your local paper.
- Contact radio and TV stations to let them know about CM Week.
- Write a guest editorial to newspapers, journals, or magazines regarding the positive impact of case management.
- Host a press conference and discuss an important health care issue in your community.
- Distribute a press release announcing National CM Week.





## FOLLOW THESE EASY STEPS TO ENSURE YOUR EVENT IS A SUCCESS!

1. Select your date, allowing 3 months lead time. Unless your event is of a social nature, choose a Tuesday, Wednesday, or Thursday for best attendance. Avoid holidays, sporting events, or other civic functions.
2. Establish your theme using CMSA materials, being sure to order ahead of time!
3. Create a Facebook page for the event, then a "Facebook Event" from that.
4. Promote on LinkedIn. Once someone RSVPs to your event, it shows up on the home profile of everyone that person is connected to, spreading the message for you.
5. There are many ways in which you can use Twitter to raise awareness. Use hashtags (ex. #CMSACMWEK2022) and encourage people to tweet out your hashtag and spread the word. Sweeten the deal with a free pass, door prize or other giveaway for one lucky hashtag-er.
6. Plan your guest list and put together a mailing and/or email list. Include a variety of guests (i.e., CMSA members, prospective members, and local media). If your event targets the public, then your guest list should include appropriate public figures.
7. Reserve your site, figuring on no more than 50% attendance. For larger groups, consider school auditoriums, hotels, churches, or community halls. Allow for booth/table space as needed, and check availability and rental fees of audio-visual equipment.
8. Arrange for catering. For daytime, consider pastries or fruit and cheese, with non-alcoholic beverages. For evening, hors d'oeuvres and punch. *Please note:* if you choose to serve alcoholic beverages, be aware of state and local liquor liability laws. CMSA does not provide liquor liability coverage.
9. Send electronic or mailed invitations at least 3-4 weeks in advance. For mailing, hand- address and send first class for greater response and follow up with a phone call a week in advance. Then keep a master list of invitees and attendance for follow-up.
10. Local papers, TV channels and radio stations' websites often host a calendar of events that offer free postings. Tweetvite is a site for promoting and learning about tweetups, and Eventful is one of many sites where you can list all types of gatherings.

11. Publicize your event using local print, radio, and TV media (refer to the Newspaper, Radio, and TV section of this guide). Your press release should state "by invitation only" if that is the case.
12. Personally, inspect the facility in advance. Check all audio-visual equipment. Request or have extra projector bulbs and extension cords on hand.
13. Get there at least 30 minutes early to meet and greet guests. Be sure to start on time.
14. Give guests "goodie bags," including CMSA logo items as they leave.
15. Follow-up promptly with an email, letter, postcards, or phone call to thank guests and send additional information to those who request it.
16. Publish an agenda.
17. Whenever possible, provide name badges, door prizes and begin the event with an icebreaker.

## HOSTING VIRTUAL EVENTS AND ACTIVITIES

Virtual events are a great way to engage a crowd! Using an everyday platform like Zoom, you can organize and engage your community in fun and meaningful ways. Here are just a few ideas!



**Host a Virtual Happy Hour!** Everyone loves an evening event where they have an opportunity to connect with friends. To make it even more exciting, send a signature cocktail recipe to attendees ahead of the event. Break the ice by asking everyone to introduce a fun fact about themselves!



**Start a CM Week Book Club!** Pick an interesting and relevant book and invite the community to read along. Host discussions about the book throughout the week. Consider various times for discussion such as over coffee, a Saturday Brunch, evening cocktail or enjoy your lunch together during the week!

**Trivia Anyone?** Have a fun time with everyone showing off their knowledge of all things CMSA and Case Management. Throw in a few random and unexpected questions that do not pertain to the field! Virtual door and winner prizes add to the atmosphere. If you are using Zoom or a similar program, you can use the breakout room feature and break large crowds into groups to play!



**Mindfulness Matters.** Case Management demands long hours and a dedicated mind. COVID-19 has impacted this demand to even greater levels. Consider hosting a virtual mindfulness session or two throughout the week. Send daily tips encouraging your community to take a breath and entertain positive thoughts!



## CREATE AN INTERACTIVE COMMUNITY THROUGH SOCIAL MEDIA!



**Facebook:** Create a Facebook page for your chapter and invite others to “like” the page. Then regularly announce our events, meetings, and special announcements; post photos and related links; create events; start about our event or record a short video of your event. photos and related links; create events; start discussions; and stay connected with individuals, organizations, and other chapters. [www.facebook.com](http://www.facebook.com)



**Twitter:** Create a Twitter account for your chapter and encourage others to “follow.” Tweet by posting your important events and retweeting interesting comments of others, news, links, etc. Follow other organizations to see what they consider news or their latest announcements. [www.twitter.com](http://www.twitter.com)



**Instagram:** Upload and share your photos of your events with this online photo management and sharing application! [www.instagram.com](http://www.instagram.com)



**LinkedIn** – If you have not already, create a LinkedIn profile for your chapter and as an individual. Search email contacts to easily way to find people you already know on LinkedIn and connect with them and their contacts. [www.linkedin.com](http://www.linkedin.com)



**Blog It!** A blog (a blend of the term web log) is a type of website or part of a website. Blogs are usually maintained by an individual with regular entries of commentary, descriptions of events, or other material such as graphics or video.

Create a blog to provide commentary or news about health care, case management, and other related news. The ability of readers to leave comments in an interactive format is an important part of many blogs. Most blogs are primarily textual. Micro-blogging, featuring very short posts, is another type of blogging. Search online free blog services, such as [Wordpress.com](http://Wordpress.com). Blogging capability can also be included as part of your website's functionality.



**YouTube** – YouTube is a video-sharing website on which users can upload, share and view videos. Create a short promotion about your event or record a short video of your event. Videos can be easily created using a smart phone or an inexpensive video camera. PowerPoint presentations can also be posted on YouTube. [www.youtube.com](http://www.youtube.com)



Consider the Internet an additional opportunity to communicate with your members and prospective members. Here are ways to combine the "high-tech" potential the Internet with the "high-touch" skills of a local chapter.

1. Whether you are building your own website or having it done for you, here are some tips to maximize your site's effectiveness.
  - Build awareness and identity of your chapter by co-branding your logo with the CMSA National Logo (request permission before using the National logo).
  - Put your website address everywhere you put your mailing address: business cards, letters, envelopes, brochures, newspaper, and magazine advertising.
  - Promote your site in your newsletter or direct mail.
  - Establish a link to the CMSA homepage, and automatically have "links" to hundreds of synergistic organizations and case management resources.

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2. Open an email account for your members and prospective members to communicate with you.
    - Email your members regularly (at least monthly) with your newsletter, news and offers.
    - Make sure your emails include a short signature. It is like attaching your business card to a letter. Include your chapter name, address, and phone number.
  3. Use your website to create an email database of prospective members who visit.
    - Emphasize that the site features special offers and is open 24 hours a day, 7 days a week.
    - Feature the new member discount (described in the membership brochure available from the National office) to encourage membership.
    - Make sure chapter members are enthusiastic about promoting the site.
    - Collect database information on your members and prospective members whenever an inquiry occurs.
  4. Match the Internet's strengths! If you don't have a website, here are some strategies to help you compete effectively:
    - Establish social media accounts and post engagement opportunities daily. Showcase a professional, but fun environment within your chapter.
    - Be very active with your prospective members. Ask questions and get them to talk about themselves.
    - Describe how CMSA can effectively help them meet their career goals.
    - Cite other member's opinions about CMSA. This "testimonial" works especially well for "experience" products like association membership.
  5. Be efficient and timely. Return phone calls promptly. Invite the prospect to attend a meeting. And most of all, ask them to join. Be available at the times your members and prospective members are available.
  6. Be visual. Share brochures have photos and samples of events to capture the interest and excitement of your local chapter activities.
    - Alert members and prospective members to special programs or events of interest.
  7. Promote the fact that you have access to CMSA products and services available at the national level.
  8. Investigate online advertising opportunities with Facebook and other social networking, online organization newsletters, websites, etc.
  9. Build your membership base by harnessing the reach of the internet!
    - Focus your efforts on promoting the personal experience of membership. Consumers are often reluctant to invest in something complex via the Internet.
    - Underscore how CMSA can help the prospective member save time (educational programs, CEs, etc.,)

# NEWSPAPER, RADIO, AND TV MARKETING

## Print Newspapers

CMSA's marketing campaign and other ongoing efforts executed by CMSA are designed to heighten the overall interest in membership and drive prospective members to you. While these marketing efforts warm the waters, you can personalize national marketing efforts to your area through local media.

- Advertise in the professional section on a regular basis.
- Promote CMSA anniversary events in the community affairs section.
- Customize the provided CMSA ad by including your chapter name, address, and phone number in the space provided. Your newspaper ad representative can help you.
- Write an article about chapter activities, events, or educational programs as an industry expert, and submit it to the appropriate feature editor.
- Submit special event news to the newspaper's "Community Calendar." It is a free listing of local events.
- Take advantage of "advertorial" opportunities. Many newspapers run special themed sections in which "advertorial" articles are written about some of their advertisers. In addition to daily publications, do not forget smaller weekly newspapers and publications

produced by local employers.

- Send press releases. Remember, press coverage is a vital part of your marketing effort and costs only minimal postage and your time.
- Use newswire services, such as those listed below, that distribute your press release to targeted outlets for a fee.
  - <http://www.prweb.com>
  - [www.prnewswire.com](http://www.prnewswire.com)

Modify the sample press releases herein.

## Local Radio/TV Stations

- Contact your local radio and TV stations and purchase airtime if a donation is not possible.
- Send local radio and TV stations press releases to be covered during local news segments.
- Offer yourself as an industry expert to discuss case management on local talk shows during CM Week.
- Use testimonials from on-air talent (disc jockeys, morning show hosts, and newscasters), whom listeners know and trust.
- Invite station personnel to a chapter event.



## Other Helpful Tips

With CMSA's help, you can spread news directly to current and new members. CMSA will provide you with a list of lapsed and prospective members. All you need to do is develop a successful mailing or emailing. Here are some ideas to spice up your direct mail efforts! CMSA can provide you a national logo to help you produce successful communication efforts.

### *Correspondence:*

- Create event themed mailings or emailing to key prospective members!
- You can use letterhead for press releases during and around activities and events. (Or visit the media outlet's website and submit your news electronically.)
- Handwritten notes go a long way! Use attractive, folding stationery cards to begin a relationship-marketing program. a. Send to prospects who visit or call your chapter as member follow-up mail.
- Send congratulations to members and prospects on birthdays, wedding anniversaries, student graduations, new births, job promotions, or any other holidays.
- Use as thank-you cards for new members who join your chapter.
- Stickers are a fun, inexpensive, and effective way to build CMSA awareness. Affix stickers to:
  - Member correspondence
  - Information packets
  - Anywhere that reminds prospective members that you are the local CMSA headquarters
- Postcards and Note Cards can be printed with the official Case Management Week slogan to send to new or prospective members to update them on special events, educational offerings and upcoming meetings. There are many sites like [VistaPrint](#) that offer affordable prices. You can also search for promotional codes for additional discounts!
- Stamp or print local chapter information on business cards and for chapter members to distribute.
- Send personal invitations for your anniversary events or thank a visitor for attending and invite them to do so again.
- Create an electronic greeting card or invitation. Many are free. Visit [Hallmark](#), [Bluemountain](#) or [Evite](#) to see what best suites your chapter and budget!

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## Advertisements

**Print:** Use CMSA's reproducible visuals and copy to create attractive flyers, chapter stationery, signage, newsletters, newspaper, and publication ads. CMSA also offers a customizable CM week poster and PowerPoint slide for your use.

**Web advertising:** Investigate website advertising on related sites. These include banner ads, sponsoring a Web site or a feature on it; advertising in e-mail newsletters; co-branding with another company and its Web site; contest promotion; and, in general, finding new ways to engage and interact with the desired audience. "Beyond the banner" approaches can also include the streaming video infomercial. The banner itself can be transformed into a small rich media event!



## Using A Newsletter

### Writing Your Newsletter

- Compile a list of topics that interest experienced, new and/or prospective CMSA members.
- Consider keeping a file of ideas for future articles.
- Keep things concise by forming a descriptive paragraph and utilizing a "read more" link. This makes the newsletter look clean and structures and gives the reader the ability to spend time reading the things they are most interested in learning more about.
- Use similar sized imaging and a consistent color palette throughout.
- Write in a friendly yet professional tone.
- Ask for "expert" help.
- Ask local case managers to write articles about their specific area of expertise.
- Invite the reader to call or visit your chapter to learn more about CMSA membership and local activities.

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## Designing Your Newsletter

- Invest in a simple desktop publishing software package or an online email marketing service (some are free or low cost) such as [iContact](#), [SendinBlue](#), or [Constant Contact](#), for professional and modern templates.
- Your nameplate (masthead) should include the group name, publication name, date, and issue number.
- Use a larger and different colored font than the rest of the text to make headlines stand out.
- Subheads (mini-headlines) give the reader an at-a-glance preview of the content that follows.
- Use no more than three typefaces: one for headlines, one for subheads, and one for paragraphs.
- Text should be "left aligned" for greater readability.
- Break paragraphs often to make your newsletter easier to read.
- Make sure that you are using royalty free or purchased images in your newsletter! Sites like [Unsplash](#) and [Freepic](#) offer free and low-cost imagery. For a curated list of sites that offer free imagery, [CLICK HERE](#).

## Producing Your Electronic Newsletter

- Set a schedule and stick to it. Quarterly publishing is realistic.
- You can hire a professional designer to lay out your newsletter. However, there are many publishing programs available, that it is easier than ever to produce it yourself! Use templates established in Microsoft Word, Microsoft Publisher, or in a low-cost web-based format with an online email marketing service.

- Length and color have no impact on pricing when creating your newsletter in a desktop publishing format.
- Easily convert your newsletter created in Microsoft Word, Publisher, or other document files to an Adobe Portable Document Format (PDF) format using Adobe Acrobat. You may then post the newsletter on your website, as well as email it to your audience. Adobe Reader is free to download at <http://get.adobe.com/reader>

## Printing Your Newsletter

We recommend a clean modern electronic newsletter, however, if you need to print a newsletter, here are some tips!

- Set a schedule and stick to it. Quarterly publishing is realistic.
- Consider hiring a professional designer to lay out your newsletter. However, there are many easy-to-use desktop publishing programs available, such as Microsoft Word and Microsoft Publisher, which make it easier than ever to produce your own materials.
- Some full-service printers also provide graphic services. Get a price quote in advance.
- Black ink is usually cheapest, but color adds impact. Here are some options:
  - Print black ink on colored paper.
  - Use one color on white or ivory paper.
  - Use black, plus an additional color if your budget permits.
- Four-color process printing is effective, but expensive.
- Digital printing is usually a less expensive option for color printing and usually refers to professional printing where small run jobs from desktop publishing and other digital sources are printed using large format and/or high-volume laser or inkjet printers.



# Creating a Communications Plan

## Build Your Mailing List

- Your current member list coupled with a prospective member list will be at the core of your communications. Use this list to:
  - Mail and/or email information on special chapter activities and events.
  - Touch base with members on birthdays and special occasions.
- Remember to ask members and prospective members about these important dates and maintain in your database.
- Build your list to reach new prospective members. Here's how:
  - As a CMSA leader, you can download a list of inactive members and request any unassigned chapter members from the CMSA National office.
  - Contact businesses and sponsors in your area whose employees may be potential members and negotiate use of that list.
  - Negotiate membership lists from similar groups.

## Create a Concept

- Develop a special offer with a time limit (e.g., "Get 16% off chapter dues during the month of October"). **Remember to contact CMSA National Chapter Services before making any changes to your chapter dues!** Contact the Chapter Services Department of the CMSA National Office to develop other ideas at [cmsa@cmsa.org](mailto:cmsa@cmsa.org).
- Offer a special gift when guests visit.
- Make it easy to respond. Provide an email address in electronic correspondence and enclose a business card, a "hotline" number, or a gift "claim card" for printed promotions.
- Keep it personal. Chances are, you will get a higher response when you address a person by name.
- For mailed material, use a real stamp instead of metered postage so your envelope does not look like "junk mail." Bulk-rate stamps are available from the post office.

## Choose a Format

- 1. Postcards:** Use postcards to:
  - Send handwritten notes to your best prospects.
  - Invite prospective members to attend a special chapter event as your guest.
  - Imprint a general message to your entire prospective member list.
- 2. Printed Direct Mail Packages:** This is a solution if you have much information to communicate. Coordinate pieces for an attractive and professional looking presentation. Elements should include:
  - On the outer envelope - include an enticing "teaser" line such as "Don't miss this Free CE offer"
  - A personalized letter that states your special offer.
  - A membership brochure or flyer.
  - A reply card, order form, etc. (as appropriate).
  - Lift note - a preprinted, handwritten note signed by the head of your organization. Lift notes are used to call additional attention to the offer and literally "lift" responses.
- 3. A promotional flyer:** To create an easy, cost-effective flyer, request a CMSA flyer with your chapter name, address, phone number, email, address, and website address in place. Hand write a message in the margin. Fold, seal, address, and mail it.



## Direct Mail Checklist

- 1. Here are the things you will want to do:**
  - Save money on direct mail by making sure your mailing is a standard post office size to avoid paying extra postage.
  - Ask at your local post office about lower cost bulk or pre-sorted rate mail.
  - Check postal code regulations prior to the design and mailing.
  - Target your mail only to those most likely to respond. For example, utilize referrals generated by CMSA national or from within your local chapter. Lapsed members are also good prospects.
  - Make your mailing as personalized as possible: use postcards, handwritten notes, and real stamps.
  - Test a variety of offers, as well as lists.
  - Keep track of all mailing details so you can compare results (sample, offer, time of year, target audience, quantity mailed.)
  - Inform your members/staff of the mailing so they can answer calls with assurance.
  - Make it easy for your readers to respond.
- 2. Here are the things you will not want to do:**
  - Use metered postage.
  - Send any mailing without an offer and a deadline date.
  - Drop first-class mail on a Friday, because if it arrives Monday (the heaviest mail day) it will have less chance of getting noticed.
  - List the features of your offer. Translate them into benefits.
  - Forget to ask them to join. Tell your readers exactly what you want them to do.

# Public Relations

You can promote your chapter without spending advertising dollars by using a variety of public relations techniques. By participating in community events and working with your local businesses and media, you can position your chapter as "the key" case management resource.

More recently, organizations are using technology as their main tool to get their messages to target audiences. With the creation of social networks, blogs, and even Internet radio public relations, organizations can send direct messages through these mediums that attract the target audiences.

Public relations means exposing your chapter or organization to the public on a non-paid basis through avenues such as special events, co-promotions, and press releases. It can result in coverage in the media, newspaper, newsletter & magazine articles, photos published in the publications interviews, mentions on websites and Facebook, trending on Twitter, or inclusion in others' blogs.

## 1. Determine Your Objectives      2. Develop Your Plan

- To establish your expertise among your peers, the press, or your potential members, attendees, colleagues, etc.?
- To build goodwill with potential members, colleagues, community?
- To create and reinforce your image?
- To inform and create good perceptions regarding your chapter, its events, or members?
- To assist you in introducing something new.
- To generate memberships or potential members.
- To mitigate the impact of negative publicity and/or corporate crisis?

What communication vehicles will you use, and in what order, to get your message to the public?

Examples may include:

- Press releases
- Articles
- Customer Success Stories
- Letters to the Editor
- Press Conferences, Interview, or Media Tours
- Radio, Television, or Press Interviews
- Seminars or Speaking Engagements
- Event Sponsorships

### 3. Select Your Publicity Tools

There are a variety of tools that can be used in the practice of public relations.

Traditional tools include press releases and media kits, which are sent out to generate positive press on behalf of the organization.

Some widely used tools include:

- Websites
- Brochures
- Newsletters
- Annual reports
- Public service announcements (PSAs) in print, radio and television.

Increasingly, companies are utilizing interactive social media outlets, such as the following, as tools in their public relations campaigns:

- Blogs
- Social media (Twitter, Facebook, LinkedIn, Foursquare social network, etc.)

Unlike the traditional tools, which allowed for only one-way communication, social media outlets allow the organization to engage in two-way communication and receive immediate feedback from their various stakeholders and public.

You may also want to utilize:

- Face-to-face or telephone contacts with editorial representatives
- Public speaking engagements, such as informational talks at colleges and with civic groups to discuss case management.
  - Bring brochures and promotional give aways available through CMSA
  - Use the CM Week PowerPoint slide template where you can.

### 4. Publicity Implementation

- Develop a targeted media list.
- Develop a list of contacts at each media outlet.
- Schedule a calendar of press release topics, such as National Case Management Week.
- Identify newsworthy events and activities.

### 5. Special Events

- Get involved in fundraising events for local charities.
- Develop a theme around case management for the event.

### 6. Co-Promotions

- Team up with local sponsors or business partners to distribute your chapter materials in exchange for promoting their establishment.
- Set up counter card displays.
- Inquire on having internal company events and rallying employees around the week.

### 7. CMSA's Press Release Shells:

- Follow these simple rules to utilize the press release shells included in this packet.
- Re-type the release and insert your chapter information and other personalized data where indicated. Copy CMSA National on press releases.
- Distribute to appropriate media.
- Include a photo if appropriate. This helps reinforce your message.
- Make sure the press release goes out in a timely manner, and follow-up with a phone call.
- Share those press releases that have been published on social media and tag the publisher.

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## 8. Creating Your Own Press Release

- Answer the four "W's" - who, what, when and where (also if appropriate, why, and how) - preferably in the first paragraph.
- Focus on what is new.
- Be accurate and craftsman like - no typos, misspelled words, or other errors.
- Make sure the release gets to the right person.
- For print and mail, use your letterhead or create special letterhead that says: "News from (your chapter)" and double space copy and leave generous margins. Keep your information brief (one or two pages).
- Let editors know when they can print information.
- Include a contact name and phone number; list address if it does not appear elsewhere.
- Summarize your main point in the headline.
- Always include a date.
- If release continues to another page, state "more" at the bottom; otherwise, sign off.

## 9. Newswire Services

- These companies offer to share your news online, increase your search engine visibility, and drive site traffic, for a fee. They include:
  - [www.prweb.com](http://www.prweb.com)
  - [www.prnewswire.com](http://www.prnewswire.com)
- Depending on the package, these services can:
  - Host your press release permanently on their site.
  - Have your news appear in search engines and news sites.
  - Send your release to thousands of news outlets.
- Utilize social media sharing technologies to assist your website



# Sample Promotional Documents

## SAMPLE PROJECT PROPOSAL

### I. Mission of Campaign:

- a. To create a greater awareness of the local CMSA chapter
- b. To promote membership in CMSA
- c. To promote support of CMSA through increased awareness of its mission and vision)
- d. To develop a foundation of support among local businesses and corporations
- e. To establish a positive relationship with the legislative community
- f. To recognize relationships with sponsors
- g. To identify and introduce/educate key contacts to the concepts of case management

### II. Goals and Objectives:

1. **Fundraising**
  - a. New member campaigns
  - b. Renewal campaigns
  - c. Lapsed Member campaigns
  - d. Corporate Sponsors
  - e. Foundation sponsors
2. **Public Awareness: Increase community awareness & involvement in case management**
  - a. Community events and activities
    1. Media involvement
    2. State general assembly
    3. Medical community

### III. Marketing Strategies:

1. **Target markets**
  - a. Prospective members
  - b. Lapsed members

- 
- c. Corporate partners
  - d. Legislative partners
  - e. Educators
  - f. Family advocacy programs
  - g. Hospital outreach programs
  - h. Community education programs
2. **Other Event Competitions – *What other events should be considered in timeline?***
- a. Local sporting events
  - b. Legislative session
  - c. Major community events (i.e., symphony)
3. **Campaign Message – *What do you want this message to say to others?***
- a. Message to convey CMSA's quality in programs & services
  - b. Theme: (check with the National office for a national slogan)
4. **Existing Opportunities**
- a. Cooperative events/collaboration with other organizations
5. **Plan Events**
- a. Kick-off with costume character visit to local hospitals and schools. End day with open house reception at sponsoring location
  - b. Chapter or organizational party
  - c. Freshman legislators open house
  - d. Day at the Capitol
6. **Promotions**
- a. Press releases
  - b. Social media (Facebook, Twitter, LinkedIn, Blogs, etc.)
  - c. Promotional kits
  - d. Outreach activities and events
  - e. CMSA exhibits at community events
  - f. Letters to mayors asking for proclamation
  - g. Letter to governor asking for proclamation
  - h. Letters to colleges and universities asking for testimonial letters of support
  - i. Letters to editors asking for editorials to run on or around the first of October.
  - j. Articles in chapter newsletter
  - k. Articles in local company newsletters
  - l. Recruit local VIPs to attend events
  - m. Invite local television stations to participate
  - n. Develop "historic minutes" to visually depict advances in case management
  - o. Write feature stories for local publications
  - p. Advertising
    - Develop display ad if funding is available.
    - Identify potential publications, websites, etc.
  - q. Press Releases

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- Identify potential publications.
  - Submit 10 days to 2 weeks ahead of deadline.
  - r. PSA
    - Proof of Performance spot on local radio/TV.
    - Identify potential sources that will assist you in developing a free public service announcement.
    - Investigate availability of local electronic billboards for community messages.

**7. Action Steps**

- a. Identify key chapter members/volunteers to be responsible for implementing activities.
- b. Identify event sponsors.
- c. Committee will provide regular reports through email, newsletters, and general chapter meetings.
- d. Develop detailed timeline with staffing requirements for each activity.

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# Sample Press Release

FOR IMMEDIATE RELEASE:

For More Information, Contact:  
John Doe, Director of Communications  
contactemailaddress@domain.com  
(XXX) XXX-XXXX  
www.cmsa.org

## Case Management Society of America Celebrates Case Managers <insert dates>

**Nashville, TN - October XX, XXXX** – The Case Management Society of America (CMSA) works year-round to increase the awareness of the essential care-giving roles that case managers play among patients, providers, payors, and the general public. National Case Management Week is the annual highlight of these efforts, during which CMSA, its members, and other organizations work to honor, celebrate, and increase appreciation for the job case managers do in the health care community. This year’s celebration is set for October XX-XX, 20XX, themed “XXXXXX.”

As the leading case management membership association with more than 25,000 members, subscribers, and followers, CMSA views case managers as an essential part of coordination and improved outcomes in health care. It works to advance the profession by helping patients, providers, and payors understand how case managers provide support to patients and families navigating the health care system. The Society supports case managers and their contributions to decreasing the fragmentation of services, as well as in their efforts to promote communication among health professionals on the patient’s team of care providers.

In honor of CM Week, case managers are encouraged to wear the “CMSA Recognition Lapel Pin,” as well as to ask their employers and colleagues to join in the national celebration of case management by creating positive events recognizing case managers and the case management industry, from theme parties, company events, and luncheons, to prize drawings that include CM Week promotional products.

### **About Case Management Society of America (CMSA)**

Established in 1990, the Case Management Society of America is an international non-profit 501(c)(6) multi-disciplinary professional association dedicated to the support and advancement of the case management profession through educational forums, networking opportunities, legislative advocacy, and establishing standards to advance the profession. It is based in Brentwood, TN., and serves more than 30,000 members, subscribers, and followers as well as over 55 affiliate and pending chapters. Since its inception, CMSA has been at the forefront of setting professional standards for the industry, which allows for the highest level of efficiency and integrity, as well as developing national and local leaders who are recognized for their practice and professional excellence. For more information on CMSA, call (615) 432-0101 or go to [www.cmsa.org](http://www.cmsa.org).

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# Sample Media Advisory

**What:** Costume characters from xxx will entertain over xx children at xx Happy Hospital, sponsored by XYZ Pharmaceutical Company, a CMSA's Case Management Week Celebration sponsor.

**Who:** Costume characters from xxx  
John Doe, Regional VP of XYZ Pharmaceutical Company

**When:** 2 p.m., Monday, October XX, XXXX

**Where:** Happy Hospital  
123 Main St.  
Anywhere, USA

## Photo

Opportunities: Costume characters from xxx  
John Doe presenting characters to Happy Hospital children

## Background:

\*All media must check-in through Happy Hospital's front desk at the main entrance, before going to the auditorium.

**Contact:** John Public, CMSA's Case Management Week Celebration Chair at (xxx) xxx-xxxx.

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# Sample Sponsorship Request Letter

John Doe  
123 Main Street  
Anytown, US 00000

Dear Mr. Doe,

On [date], CMSA is pleased to host [description of event]. This [event] will take place at [location of event] and will serve as the grand finale in a series of activities. This program is a tribute to the [sponsor or honoree] who support our local chapter.

We invite you to join us in support of CMSA and request [invitee] consider purchasing a block of ten tickets at [cost] for the event. Individual tickets are available at [cost]. [event coordinator], CMSA's Case Management Week Celebration coordinator will be in contact to discuss this exciting event. In the interim, please feel free to contact [him/her] at [number].

Sincerely,

[Chapter President/Event Chair]

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# Sample Thank You Letter to Sponsor

123 Happy Valley  
Anytown, US 12345

Dear Mr. Sponsor:

On behalf of CMSA, I offer our most sincere thanks for your generous support of our CMSA's Case Management Week Celebration.

We feel confident that as a sponsor of CMSA's Case Management Week Celebration, you will realize a more than satisfactory benefit from this association. Furthermore, we anticipate you will find a long-term relationship with CMSA promotes an image of stability and civic mindedness that will be of lasting benefit to [name of company].

Jane Chair, Campaign Coordinator, will be in regular contact to keep you apprised of upcoming activities and all publicity. Please feel free to contact her, or myself, at (xxx) xxx-xxxx should you have any questions.

Again, we thank you for taking a leadership role in shaping the future of case management.

Sincerely,

Sue Smith  
President/Chair

## Sample Sponsor Recognition

**Sponsorship recognition during CMSA's Case Management Week Celebration special events which include:**

- CMSA's Case Management Week Celebration Open House at XYZ
- CMSA Day at the Capitol
- Case Management Week, October <XX – XX>

**Sponsorship recognition in all promotional campaigns planned for each special event or program.**

- Monthly recognition of sponsorship in the CMSA chapter publication and other regularly scheduled communications published by the chapter.
- Statewide publicity through press releases.
- Certificate or plaque for sponsor.
- Ten complimentary chapter CE programs.
- Complimentary invitations to all CMSA's Case Management Week Celebration events.

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# Sample Proclamation Letter

<Date>

<Address>

Dear <Sec of State>:

The Case Management Society of America (CMSA) will celebrate National Case Management Week, October <insert dates>. CMSA has celebrated Case Management Week since 1998. This weeklong celebration serves to recognize case managers, to educate the public about case management and to increase recognition of the significant contribution of case managers to quality healthcare for the patient, healthcare provider, and payer.

Entities ranging from health care facilities, managed care organization, military installations, employer markets and care & disease management companies will be sponsoring local recognition, and educational events during this week through activities in the health care companies and efforts of the local CMSA chapters. The Case Management Society of America is an international organization of case managers, and healthcare professionals, committed to promoting the growth and value of case management, and to support the evolving needs of the case management professional. Founded in 1990, CMSA now has over 30,000 members, subscribers, and followers, as well as over 55 affiliated and pending chapters. Case management is a collaborative process of assessment, planning, facilitation and advocacy for options and services to meet an individual's health needs through communication and available resources to promote quality cost-effective outcomes.

As president of the local affiliate of the national organization, I respectfully request the state of <state> proclaim October <insert dates> as National Case Management Week. As a nonprofit organization, we are proud of the contribution our membership makes to the quality of healthcare in <state>. To that end, we believe this proclamation will serve to support the continuing work of <chapter name> as a critical link in the effective delivery of healthcare. In a time of unprecedented change and uncertainty in the healthcare industry, certainly we can all agree the mission and goals of CMSA, and case management will serve the citizens of <state>.

Sincerely,

NAME

Title

**NOTE:** *(If a proclamation is received, contact local media outlets to see if you could promote case management. What an opportunity to educate the public about what is case management and to ask for a case manager!)*