

# PERSON-TO-PERSON AMBASSADOR HANDBOOK



National Center for Chronic Disease Prevention and Health Promotion  
Division of Population Health





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## INTRODUCTION



The goal of the Ambassador Outreach Strategy is to increase the number of people who participate in self-management education workshops. Audience research conducted by the Centers for Disease Control and Prevention has shown that word of mouth is an effective way to promote programs like the Chronic Disease Self-Management Program (CDSMP). In your area, the workshops may be called by another name, like “Living Well” or “Healthy Living.”

As a Person-to-Person Ambassador, you are the key to the success of this strategy. You are an Ambassador because you have experienced the benefits of participating in a CDSMP workshop. We need your special talents. You have experience, and you know how to connect with other people in your community. You were chosen because of your success and your enthusiasm for self-management education. You have what it takes to market the value of CDSMP workshops to your friends, neighbors, and leaders in your community and even to people you do not know.

## How to Use This Handbook

This handbook is set up in three steps, with tools and forms to help you “sell” participation in CDSMP workshops. The marketing term *pitch* refers to delivering this message. The first step is preparing to be a Person-to-Person Ambassador. You will receive training from your Ambassador Outreach Coordinator that will allow you to plan your outreach approach and practice your marketing pitch. The second step is delivering an effective pitch that convinces people like yourself to sign up for a CDSMP workshop. Finally, in the third step, you will be connecting with your Coordinator on a regular basis to keep him or her informed and to make sure you have the support you need. More details about each step are provided on the following pages.



As you move through each step, you will see icons for Tools  and Tips . They were customized by your Coordinator for your specific location and needs.

## STEP 1: PREPARING TO BE A PERSON-TO-PERSON AMBASSADOR

### Train and Make a Plan

The best preparation is practice. During training, you will have a chance to learn how to use this handbook, how to connect with people, and how to market CDSMP workshops. You will also learn how to make a plan for your outreach efforts. When you participated in a CDSMP workshop, you learned how to make a plan every week to take steps to improve your own health and well-being. That action plan was an important part of your success.



Your Coordinator will give you a Person-to-Person Ambassador Outreach Plan form.

PERSON-TO-PERSON AMBASSADOR OUTREACH PLAN				
Name: _____				
Month/Year: _____				
Who	What	When	Where	Notes
Mary Smith	Neighbor	July 25, 9:00am	My house	Talk during coffee at my house.

Your Coordinator will help you identify community members or people of influence in your community to speak with about self-management education. Once you have identified the “who,” then you will need to identify the “how.” Will you schedule a time to talk, or will you just talk about a CDSMP workshop casually the next time you see someone? Will you talk face-to-face or call people on the phone? You and your Coordinator need to stay in touch to review your plan and your activities regularly. That way, you can get support for what you want to do and you may be able to help other Ambassadors with your ideas.

### Learning the Basic Message or Pitch

As an Ambassador, you will be talking with individuals that you may or may not know. You could be at church or in a grocery store. You might be talking to your doctor or to a faith-based leader or other person in your community who can recommend the workshop. You might have 1 minute, 5 minutes, or longer to talk. Regardless of the circumstances or how you say it, make sure that you deliver this basic message:

**“We both [or we all] have ongoing health problems. This workshop helped me, and I think it could help you too. Here is how you can sign up.”**

This message has three parts: the opening, the persuading information, and the closing. If you use all three in every pitch, you will give people good reasons to sign up for a workshop.

Your Coordinator will give you a Talking Points Card that you can carry with you to remind yourself of the three parts of an effective message.

### **1 Part 1: Opening**

Make a connection with the people you are talking to by relating your own experience with a chronic condition or ongoing health problem. If you have time, you might talk about limitations you have experienced, such as pain, fatigue, or worry that kept you from doing the things you like to do.

*Example:* “Did you wake up this morning with a smile on your face and jump out of bed ready to roll? I know how it is—we have ongoing health problems. There is a workshop that helped me and I think it could help you too.”



## 2 Part 2: Persuading

Describe the benefits of CDSMP workshops. This is the time to “sell” the workshop. Share one or more examples, depending on time, of how the CDSMP workshops helped you.

*Example:* “I got a lot out of this workshop. I learned how to be independent and how to exercise safely and use other techniques for staying active and healthy. Here are some of the benefits I have experienced from participating in a CDSMP workshop:

- “I learned new skills that help me to be more independent so I can do more of the things I like to do.”
- “Now I am in charge of my ongoing health problems instead of health problems being in charge of me.”
- “Everyone at the workshop shares experiences and supports each other.”
- “I learned techniques like exercising safely that have helped me move more easily.”
- “Now, I have more energy and I can breathe more easily when I climb stairs.”

Add other examples from your own experience.

## 3 Part 3: Closing

Show people how to sign up for CDSMP workshops. Make sure everyone you talk with knows how to sign up. Give them a handout with information about upcoming workshops.

*Examples:* “Here is how to sign up for a workshop. What can I do to help you sign up and participate?” and “There’s a workshop close by that is coming up. Here is information about it. It’s a great way to meet other people like us, and it’s fun.”

Discuss the workshop information. Ask people if they have questions or if you can help them to participate. Give people the CDSMP Information and Workshop Schedule.

### Talking Points Card

**MAKE THE PITCH**

- 1 Opening:** Make the connection...
- 2 Persuading:** Describe the benefits...
- 3 Closing:** Demonstrate how to sign up...

**MAKE THE PITCH**

- 1 Opening:** Make a connection.  
“We both for we all have ongoing health problems. This workshop helped me and I think it could help you too.”
- 2 Persuading:** Describe the benefits.  
“I got a lot out of the workshops. I learned how to be more independent, how to exercise safely, and how to use other techniques for staying active and healthy.”
- 3 Closing:** Demonstrate how to sign up...
  - “Here is how to sign up for a workshop. What can I do to help you sign up and participate?”
  - Hand out the A&M or CDSMP Information and Workshop Schedule.



### TIP

Audience research has found that people are most interested in the benefits that help them maintain independence and do the things they like to do.

## STEP 2: MARKETING THE CDSMP WORKSHOPS

### How to Connect with People

Now that you have planned and practiced your pitch, you will be reaching out to the individuals and influential leaders that you identified. The CDSMP pitch in your handbook provides an outline for you to follow when preparing your pitch. The style of the conversation will vary depending on your audience and how much time you have to talk.

### Tailoring Your Pitch for an Individual

Every conversation is personal. To really connect with someone, you may need to think about the person you are talking to. Is this a friend or a family member, or is it someone you have just met at church, at a brunch, or in the grocery store?

You were chosen to be an Ambassador because you are a “people person.” Use your unique talents to tailor your pitch to each individual that you have the chance to talk with. You can use the guidelines and tools provided here to make each pitch a home run.

### Tailoring Your Pitch for an Influential Community Member

Sometimes you will be making your pitch to your doctor; minister, priest, or rabbi; hairdresser; or another influential person in your community who can recommend the CDSMP workshops to others. You will still include all three parts in every message because, no matter whom you talk with, audience research has shown that these points influence most people to get involved.

You may want to tailor the first part of your pitch to an influential person by acknowledging that he or she may encounter many people who have ongoing health problems. Part two of your pitch will focus on the benefits you have experienced from participating in a workshop. Part three can focus on providing the person with information on how to recommend a workshop and give people the tools to sign up.

### How to Make the Most of Your Time with People

- **Listen carefully** to determine what information will convince each person that a CDSMP workshop is worth attending.
- **Maximize your time with people** by focusing on the basic messages. Be prepared to answer questions, but only spend extra time on details if someone expresses interest and has the time.
- **Make it easy to recommend the workshops** by organizing packets of outreach materials in advance. That way, you can give the person all of the information he or she needs. Pay attention to questions and reactions and tailor your messages as needed. Emphasize the benefits that make the workshop worthwhile.



See the Chronic Disease Self-Management Program Information and Workshop Schedule.

**Chronic Disease Self-Management Program (CDSMP)**

A series of workshops for people with arthritis, diabetes, heart disease, lung disease, and other health problems.

- Learn ways to control pain and other symptoms, get around better, and stay independent.
- Talk to other people about what helps them deal with their health problems.
- Workshops are 2½ hours long. They meet once a week for 6 weeks.
- They're led by trained instructors who have or understand health problems like yours.
- People who take the workshops:
  - Have more energy and less pain
  - Feel less tired and less depressed
  - Get more exercise
  - Can talk to their doctors more easily
  - Are more confident they can manage their own health.

Look for a class near you. See the back of this flyer for locations and schedules.

Classes in Your Area

- **Make it easy for people to participate** in a CDSMP workshop. Ask yourself, what information does this person need to know? What resources does he or she need? Use the CDSMP Information and Workshop Schedule or other materials that your Coordinator gave you. Handouts will help people sign up for workshops.

**Tip**

Incorporate lessons learned as you refine your approach for future outreach visits.

## Make Each Pitch a Home Run

Follow up with the people you talk with to reinforce the messages you shared during your conversation and to make it easy for them to sign up for a workshop. For best results, consider contacting people more often in the weeks right after you talked with them. Make sure you contact people early enough so that they have time to sign up for a workshop.

Staying in contact with people does not need to take a lot of time. Use the notes from your Ambassador Outreach Report to create a follow-up plan that works for you and the amount of time you have.

Here are some suggested ways to stay in contact with people:



### By Phone

Call the people you talked with soon after meeting them. Ask if they have had a chance to look at the handout or fact sheet you gave them. Ask if they have any questions that they did not get a chance to ask you before. Remind them to contact you if they need more information. If you cannot reach someone by phone after leaving three messages, try to reach them another way. For example, you could mail them CDSMP information.



### By Mail

You can also send materials—such as a postcard reminder, fact sheet, or short note—by mail. You can provide another copy of the CDSMP Information and Workshop Schedule. Make sure to repeat the time and place of the next workshop.



### By E-mail

Some people may prefer to be contacted by e-mail. This method gives them a chance to ask questions as they think of them and to contact you at their convenience. It also gives you time to provide current information about a workshop and to respond to people's questions quickly and easily.



See the Ambassador Outreach Plan and Outreach Activity Report.

**PERSON-TO-PERSON AMBASSADOR OUTREACH ACTIVITY REPORT**

Ambassador Name: \_\_\_\_\_  
 Month/Year: \_\_\_\_\_  
 Instructions: Use this table to report your activities. Give it to your Coordinator at the end of each month.  
 Return report to: \_\_\_\_\_  
 Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_  
 Address: \_\_\_\_\_

Date	Name of the person you talked to	Contact information	Follow-up: How will you make sure this person signs up for a workshop?
7/15/2013	May Smith	555-454-3213 msmith@aol.com	Followup - call in 1 week

## STEP 3: CONNECTING WITH YOUR COORDINATOR

At the end of each month, look at your Ambassador Outreach Plan to assess your efforts. You should also contact your Coordinator to review your activities. You and your Coordinator may decide to meet or talk by phone. Your Coordinator will give you an Ambassador Outreach Activity Report form to keep track of the people you talked with, how each visit went, what questions people had, and what kind of response you received. For example, did the people you talked with sign up for a workshop? Would you change your pitch in the future on the basis of what you learned?

When you connect with your Coordinator, you may want to add any suggestions you have about future activities. You and your Coordinator will also want to use this time to plan your activities for next month.

### SUMMARY

As you can see, YOU are the key to success! We hope that you will find marketing CDSMP workshops easy and fun to do. Here are some tips to remember.

The Ambassador Outreach Strategy has three steps:

Step 1: Preparing to Be a Person-to-Person Ambassador

- Make a plan.
- Prepare and practice your pitch.

Step 2: Marketing the CDSMP Workshops

- Connect with people.
- Make your pitch stick.

Step 3: Connecting with Your Coordinator

- Check in regularly.
- Celebrate your success.

THANK YOU for your valuable contribution to the health and well-being of people in your community. Please contact your Coordinator with your comments or concerns.



Your Coordinator will give you tools and handouts that are customized for your specific needs. They include

- Person-to-Person Ambassador Outreach Plan.
- Ambassador Outreach Activity Report.
- Talking Points Card.
- CDSMP Information and Workshop Schedule.



# NOTES

## Person-to-Person Ambassador Handbook

