

# Nonprofit Marketing Plan Template

(For an 18- to 24-month two-year organizational marketing plan)

## 1. Goals—What you need to accomplish

- **Key Questions:** What are your organization's main one to three goals? And what are your one to three marketing goals (how marketing can best contribute to achieving organizational goals)?
- **Examples:**
  - Organizational goal for Environmental Health Partners (EHP):
    - Improve regional health by significantly reducing exposure to toxic chemicals like lead in homes, bay contamination, and air pollution from trucks, ships, power plants and other sources.
  - Marketing goals:
    - Build awareness about EHP's work and impact.
    - Motivate 15 area residents to attend a two-part community meeting (to be held in each of four neighborhoods in the region), to build their understanding of the relationship between health and the environment and train them as effective advocates.
    - Forge partnerships with key partner organizations in the region with existing relationships with citizens and policymakers.

## 2. Benchmarks and Measurement—Staying on the pathway to success

### *Part One—Benchmarks*

- **Key Questions:** What are three to five concrete, specific and measurable (when possible) steps to complete en route to achieving your marketing goals? Warning—Vague benchmarks will get you nowhere.
- **Examples:**
  - Finalize partnerships with two organizations to cross-promote advocacy campaigns within the next six months.
  - Initiate building six additional partnerships.
  - Increase the number of incoming inquiries (coming from a partner org website, a volunteer advocate or another source) from prospective volunteer advocates by 10% in 2012 and by 15% additional in 2013.

### *Part Two—Measurement*

- **Key Questions:** How will you know if you are moving down the right path or not? You need to know:
    - What is working best so your org can do more of it?
    - What targets are engaged and which segments do you need to engage differently?
    - What content is most compelling to your base?
    - What messaging generates action and what fails to motivate?
  - **Examples:**
    - Meeting participation.
    - Incoming inquiries.
    - Website usage analytics: "What are the most visited pages on your site" to "What keywords are users searching on to get to your site?"
    - Response rate to direct mail, telemarketing.
    - Open and click through rates to e-mail fundraising and other e-communications.
    - Online survey findings and other audience research.
    - Change in volume of incoming inquiries from each source (website, volunteer referral).
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### **3. Situation Analysis—The Conditions Inside and Outside Your Organization**

- Key Questions: What is the environment in which you are working, including the perspectives of current and prospective audiences? You can assess the situation in several ways.
  - Environmental scan: What policies, practices, or other factors could help or hurt your marketing success?
  - Competitive analysis: What are other organizations providing in terms of content, programs and resources? How successful are they?
  - Audience research: What does your audience think about your organization, its work and/or the issues you work on?
  - Marketing audit: What current marketing work is succeeding, and what needs to change and how?
  - Internal audit: What are the perceptions, hopes, ideas and concerns of staff and leadership in relation to the marketing agenda?

### **4. Target Audiences and Segments**

- Key Questions: Who are the one to three top audience groups you need to engage to meet your communications objectives and what do you need them to do? How do they break out into segments (that share perspectives, habits and wants)? And what are the wants, habits and preferences of each segment—so you know how to connect with them? Alert: If you try to reach everyone, you will fail to engage anyone well.
- Examples:
  - Target audience: County residents—Build their understanding of the environmental health dangers in the region and how they can improve the situation, so they are motivated to advocate for cleaner environmental behavior on the part of corporations. Their main want—for their children to stay healthy.
    - Segments: Parents of children 12 and under; parents of children 12 to 18; school administrators; home owners.
  - Target audience: Staff members and leadership of prospective partner orgs working in the region—Build understanding of EHP's role and impact in fighting for community health so prospective partners see the partnership as providing value to their own impact, and want to collaborate.
    - Segments: Staff and leadership of organizations serving the communities within the region that are most at risk; staff and leadership of other regionally-focused environmental organizations; neighborhood home owner associations.

### **5. Calls to Action—What you want your target audiences to do**

- Key Question: What are you trying to get your target audiences to do? Be specific.
- Examples:
  - Subscribe to our e-newsletter.
  - Participate in our community meeting.
  - Share your story.
  - Learn about environmental dangers in and around your home.
  - Collaborate on a project with us.

### **6. Framing the Message—Benefit Exchange and Barriers to the Call to Action**

#### *Part One—Benefit Exchange*

- Key Questions: Why should your target audiences care? What's it in for them?

- Examples:
  - Seek to ensure that their children, other family members and friends are healthy.
  - Want to ensure property values.

### *Part Two—Barriers*

- Key Questions: What challenges do you face in motivating the action? What’s going to be difficult?
- Examples:
  - Industry owners in the region have implemented well-resourced campaigns to promise safe and healthy living to residents.
  - Parents have too many choices and time constraints.
  - Partners don’t really trust us yet.

## **7. Best Strategies—The best ways to achieve your marketing goals**

- Key Question: Given your target audience groups you need to engage and the actions you want them to take, what are the best ways to motivate them to do so?
- Examples:
  - Build the network: Nurture relationships with prospective “supporters” within relevant local organizations, from the Lions Club to the Chamber of Commerce.
  - Message development: Shape and deliver messages that will clarify for, connect with and engage our audiences. Consistent, memorable messaging helps your base to keep your organization top of mind, recognize its relevance to them, and spread the word about it.

## **8. Tactics—How to bring your strategies to life**

- Key Question: How to connect your organization with your target audiences via these strategies?
- Examples:
  - Write the message platform—Audience research; write positioning statement, tagline, talking points); train staff and board on messaging, develop style guide; launch.
  - Standards guide—Create a guide (PDF) for staff and volunteer messengers to use to make decisions on messaging and “look and feel” of communications.
  - Develop a one-page “leave behind” flyer summarizing the value of partnering for prospective partners, and a series of follow up emails (to follow in-person visits to prospective partner organizations).

## **9. Resources—What’s needed to implement**

### *Part One—Roles and Responsibilities*

- Key Questions:
  - Who does what?
  - Existing staff? New staff? Outsource? Social capital (board members, volunteers, other connections)?
  - How many hours (per week or month) is it expected to take?

- What training (if any) is necessary to build necessary skills?

### *Part Two—Budget*

- Key Question: How much is it going to cost?
  - Ideal to begin planning process with an idea of what you can spend so you can plan realistically.
  - Goal is to develop an understanding of greatest ROI (return on investment) and to track budget in coming year.
  - These findings will inform the budget for the following year.
  - More on budgeting here:
    - <http://gettingattention.org/articles/2741/planning-budgets/nonprofit-marketing-budget-2.html>

## **10. Step-by-Step Work Plan—Start with a 90-day plan, then extend it to cover six months**

- Key Question: How to roll out the program? What are the immediate steps to take once you have an approved plan?
- Elements: Every discrete task that needs to be done, who tackles each task, start date and deadline for each task.