eGuide

7 Steps to Creating Your Best Nonprofit Marketing Plan Ever

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A Word About Marketing ...

Many nonprofit organizations struggle with the concept of marketing themselves and their missions. It seems too sales-centric, too fueled by money. They ask, “Is it slimy to apply marketing to nonprofits?” Our answer: Definitely not. Here’s why:

- **Marketing is a tool.** Tools aren’t good or evil. They are morally neutral methods that can be used for noble reasons or for ill. Marketing a good cause is a noble endeavor.
- **As people with a cause, we’re in the business of persuasion.** Marketing is a way to be more convincing so that we’re better at persuading people to buckle up, donate, sign a petition, eat healthily, or whatever the case may be. Marketing isn’t “manipulation”; it’s a way of doing what we already do, but better.
- **Marketing is respectful.** Refusing to take the audience’s perspective into account and talking to people as if you’re shouting into a megaphone is not respectful. Asking people what they care about and then relating your cause to their values is respectful. Good marketing is a conversation, and that’s much less slimy than a soliloquy.
- **Marketing is efficient.** What is immoral and slimy is not doing good marketing and wasting precious taxpayer or donor dollars on ineffectively dealing with social issues.

The key is to be true to yourself. Marketing allows you to meet your audiences where they are, physically and mentally, but it does not require you to lose your own way. Stay true to your mission, represent yourself honestly, and promise only what you can deliver. In that way, you can gain a competitive advantage over all the other folks using marketing for more nefarious ends.

Get the most out of your nonprofit marketing efforts by having a well-organized and strategic marketing plan. The seven steps in this guide will help you answer key questions, improve your messaging, and create your nonprofit marketing plan.

1. Perform an Organization Self-Assessment

The first step in any proactive marketing plan is to assess the current state of marketing at your organization. Take a step back and discover what's actually occurring—or not occurring—at your nonprofit.

Define Your Audience(s)

Let's say that you run an animal shelter called Paws for the Cause. Your goal is to find loving homes for homeless cats and dogs in your area. Who is your audience here?

- **Determine your constituents.** Cats and dogs.
- **Who else is there?** Who comprises your donor base? Do you have volunteers who regularly come in? Are there people you want to target to adopt pets? What about local officials you're hoping will embrace certain policies? How did you meet these people, and what are they getting from you?
- **Be honest.** Create a list of everyone your organization comes into contact with: people who visit the shelter, folks who have joined a newsletter list from your website, people who have never heard of you but their friends have, etc. This list will help you determine what you should be saying to them, as well as when and how.
- **Think about how you treat your audiences.** How do you treat your audiences when they call or email you? How often do you send fundraising appeals, information, updates, or policy alerts? What other types of communication are you sending? What recognition do you offer donors for their generosity?

Map Your Messages

Now that you have taken stock of who you are talking to, map out what you have been saying to them:

- What's your tagline?
- Do you have mission and vision statements?
- What's your elevator pitch? If you met someone in an elevator who had never heard of your organization, how would you describe your impact during that 30-second ride?
- Who wrote your messages? Was it a consultant, your executive director, a communications intern who had snappy catchphrases?

Next, determine how effective and consistent your messages have been. There are two quick ways to understand where your organization stands on this front:

- Ask two volunteers and two staff members, "What does our organization do? How are we different?"
- Ask a few of your supporters these same two questions.

Hearing any varying opinions may be eye-opening. If everyone seems to be on the same page, are they repeating what you (you fabulous marketer, you) think is your organization's true identity?

Define Your Channels

Which communication channels do you use and how often?

- Organizational website
- Social media (Facebook, Twitter, blogs, and so on)
- Paid advertising (Google AdWords, print or online banner ads)
- Unpaid placements (PSAs)
- Communications (newsletter, e-newsletter, direct mail)
- Special events
- Brochures
- Annual report

It's Time for Analysis!

As fun as gathering all of this data has been, it will not do you much good unless you put it to use. Now, you should evaluate the quality and effectiveness of your marketing outreach. Some of your research may drive these discussions, but here are a few basic questions to consider

- Are your messages consistent?
- Are your communications materials how you want them to be? What would you change?
- Does the way your organization perceives itself match the way others see it?
- Are your communications heavily weighted on fundraising versus other types of outreach?
- Does your tagline differentiate you from other organizations that focus on similar issues?
- Were there any audiences you hadn't considered or spoken to directly prior to this fact-finding?

2. Set Goals and Strategies

A properly organized nonprofit marketing plan supports itself like a pyramid. For each goal, there are objectives, every objective has strategies, and each strategy has tactics. However, all too often the terms goal, objective, strategy, and tactic are used interchangeably. Plainly put, they aren't the same—and the resulting lack of precision can be problematic.

Goals

A goal is a "statement of being" for a plan. While the completion of a goal signifies the end of your plan, the objectives, strategies, and tactics are the means to that end.

Objectives

Objectives are more focused and specific. The best-formulated objectives express results as measurable outcomes. Think in terms of the awareness, attitude, or action that you hope to invoke. Often there are multiple objectives in support of a single goal. Meaningful objectives start with action verbs and have four parts. They should:

- Identify a specific audience being addressed.
- State a measurable outcome.
- Set an attainment level.
- Set a time frame.

Strategies

Strategies are where the rubber meets the road. Rarely is one strategy enough to fully accomplish an objective. Likewise, it is not unusual for a single strategy to serve multiple objectives.

Tactics

Tactics are the specific tools you use to implement your strategies. News releases, brochures, media pitches, e-newsletters, blogs, websites, surveys, focus groups, and videos are some examples that spring to mind. It is up to you to decide exactly which tactics are needed to successfully implement the chosen strategies.

A good nonprofit marketing plan is interlinked from top to bottom. Without good tactics, a strategy will not successfully complete an objective, rendering the success of a goal limited. A true marketing plan should employ the right mix of experience with critical thinking. With a strong understanding of the key differences among goals, objectives, strategies, and tactics, you'll have a clear plan that can be successfully executed.

What Do These Goals and Objectives Look Like?

Let's revisit our friends Paws for the Cause. With their new plans and goals in place, it is important for them to keep perspective about what these objectives set out to do: Paws for the Cause is planning ways to persuade audiences to take some sort of action.

See the table below for examples of this "Point A to Point B" planning:

Target Audiences	Desired Actions
Local pet stores	Offer shelter dogs for adoption.
Donors	Give financial support for the shelter's new puppy wing.
Community members unfamiliar with Paws for the Cause	Visit your website and sign up for your newsletter.
Onetime volunteers	Become a regular volunteer.

Now, think about your distinct audiences and which actions you would like them to take as a result of your outreach:

Target Audiences	Desired Actions

3. Determine Your Unique Value

What is the foundation of your fundraising messaging and nonprofit outreach? **Your point of differentiation.** What makes your nonprofit the only one of its kind? Here's how to determine your nonprofit's unique value proposition:

1. **Take a journalistic approach to determining your "onliness."** Break it down with five Ws and an H: Who (are your constituents), What (is your issue area), Where (are your constituents located), When (do they need you), Why (are you important), and How (are you different)?
2. **Get an outside insider's opinion.** Call a volunteer and ask why he or she is involved with your organization and not Joe's Other Advocacy Group down the street. Your view of your differentiator might be way off from what your supporters see.
3. **Complete this phrase: "Our nonprofit is the only _____that _____."** This gets right to the core of why your organization exists in the first place. Who are you serving that no one else does, and how are you doing it differently?

Use your "onliness" statement to help you make decisions. Will a new program align with your statement? How can you position your organization in fundraising campaigns?

Find Your Brand's Sweet Spot

Think about what happens at the intersection of *what's important to your audience, what your organization is good at, and what you're doing that nobody else is.*

4. Craft Your Message

Now you know where you'd like to go. How do you get there? Appeal to your audience's values.

How to Put Your Audience First

Many organizations create their marketing materials with the worst approach for getting attention from the people they want to reach. They send their messages out with what Jay Conrad Levinson calls "you marketing."

- **You marketing:** The kind of communication that centers on the organization. When I pick up your brochure as a prospect, I am learning about you. You are talking about you. You are telling your side of the story.
- **Me marketing:** Most people are tuned into what matters to them. They care about messages that speak to their needs. If I pick up your brochure and it is talking about me, I am far more interested. This approach forces you to find the benefits of what you are offering to people.

Look at your nonprofit's website and brochures. Do you talk about your mission, your great staff, your awards, your programs? Is it all about you, you, you? How can you change the copy to reflect more "me marketing"?

To refocus your nonprofit outreach, make sure your messages satisfy what we describe as CRAM: **Connecting, Rewarding, Actionable, and Memorable:**

1. **Connect to things your audience cares about.** Saving time, feeling good about themselves, feeling powerful, etc.
2. **Identify and offer a compelling reward for taking action.** Remember that good rewards are immediate, personal, credible, and reflective of your audience's values.
3. **Have a clear call to action.** Good actions are specific, feasible, and easy to visualize doing. They should measurably advance your mission.
4. **Make it memorable.** What makes something memorable? It's memorable if it's different, catchy, personal, tangible, and desirable. These memorable elements should always be closely tied to your cause.

Craft Your Call to Action—With Emphasis on Action

Your call to action is the pivotal piece of your message, so it's important to get it right. An effective call to action has five necessary attributes. Let's revisit our Paws for the Cause example to see how they might carry through a call to action:

1. **Be highly specific.** If Paws says to stop all animal abandonment, a person might respond, "I can't solve that entire problem." Instead, focus on a very specific action, such as, "Forward this email to five of your friends to encourage them to learn more about pet drop-off options."
2. **Be feasible.** Your action needs to be very easy to do so that it doesn't overwhelm potential supporters. When somebody does something small, they are more likely to do something larger later on. It's not appropriate to ask a one-time, $10 donor to donate $1,000 to your capital campaign—personalize your messaging.
3. **Have a first priority.** Not everybody is ready to donate, volunteer, or clean up the kitten cages at your shelter right this very second. Think about how you can build your community of potential supporters and about enticing ways to get a person's email address.
4. **Be free of barriers.** Watch somebody go through the steps involved in your call to action and see where they get hung up, if there are unnecessary steps, and if everything is easy to understand. Honor your audience's time by making everything as straightforward and quick as possible.
5. **Be filmable.** Your audience needs to be able to visualize what they will be doing. If they can't picture themselves doing it, they aren't likely to do it. For example, it's pretty easy to picture yourself forwarding an email or spending a Saturday morning with puppies.

Engage Your Audiences

Your marketing messages need to put the recipient first and have four clear characteristics: connection, reward, call to action, and a memorable quality. At this point, you have an audience-centric message. Now you need to engage that audience to pay attention to your message. Here's a quick checklist of ways to engage your constituents with your messaging:

- [ ] **Do cross-channel promotion.** Email your donors before they receive postal mail appeals. On the phone, give your donors the option to give online. Send email to your best offline donors. Make the pieces work together.
- [ ] **Make marketing a conversation.** Be sure that all your online outreach and presences enable two-way conversation with your supporters, fans, and nonfans.
- [ ] **Be accessible, easy, encouraging, and intimate.**
- [ ] **Show accountability.** Make it clear where the money goes!
- [ ] **Make it easy for people to find you.** Optimize your search engine marketing. Start by getting as many high-quality links to your site as possible.
- [ ] **Segment your way to success.** Talk with supporters differently depending on who they are, how they give, and the ways in which they support you.
- [ ] **Test, test, test.** Try never to do one version of any appeal or newsletter. Test different versions so you can learn and improve all the time.
- [ ] **Make your supporters your messengers.** Ask your supporters to spread the word among their friends and family.

Do More Than Engage—*Inspire*

Whether you're after supporter dollars or volunteer engagement, inspiration is the driving force behind taking action.

Here are a few quick, actionable tips for building passion for your organization:

1. **Tell your organization's founding story once a year.** Communications guru Andy Goodman calls this part of the "sacred bundle" of stories—a profound reminder of the deep values and moral struggle that gave rise to your organization's existence.
2. **Have a cultivation strategy and calendar.** Send emails to donors that thank them and report back on how you've spent their money.
3. **Ask your donors for their feedback and opinions on a regular basis.** And use their advice when appropriate; it shows that you're listening.
4. **Offer periodic live chats or phone-in briefings with your CEO.** This is a staple of major donor fundraising, inexplicably absent from the online giving scene.
5. **Offer real-life glimpses into the life of your organization.** Your supporters expect authenticity, which is arguably the paramount value in marketing communications.

(Source: SeaChange Strategies and Care2, A Procrastinator's Guide to Year-End Fundraising)

5. Choose Your Tools

We're all about nonprofits becoming online fundraising and marketing superheroes. And every superhero (even the planner types, like you) needs a utility belt of resources to get through the day-to-day tasks and the tight spots you might run into along the way.

Determine Your Online and Offline Marketing Mix

There is no single recipe for success when it comes to determining a nonprofit marketing mix. It will depend on what makes the most sense for your audiences, including constituents, donors, volunteers, and advocates.

Use this checklist to determine what makes the most sense for your organization:

Online

- [ ] Website
- [ ] Social media (Facebook, YouTube, Twitter)
- [ ] Paid advertising (banner ads, Google AdWords)
- [ ] Public relations placements on websites/blogs
- [ ] Special events pages
- [ ] Online donation page
- [ ] Email outreach (e-newsletter, advocacy alerts, fundraising appeals)

Offline

- [ ] Printed collateral (brochures, annual reports)
- [ ] Direct mail
- [ ] Newsletter
- [ ] Paid advertising (outdoor, print)
- [ ] Public relations placements (radio, TV, newspapers, magazines)
- [ ] Phone bank
- [ ] Special events

Tip: To stay audience-centric while you develop your marketing mix, gather information about your audience's communication preferences. You might think most of your supporters are strictly offline (or exclusively online). Don't assume—get to know them!

6. Define Your Budget, Timeline, and Resources

Set Your Budget

Now that you've determined the right mix of channels for your outreach, decide how much money you'll need for producing your marketing materials, email and offlineoutreach expenses, as well as paid media such as advertising or search engine marketing (e.g., Google AdWords). You can choose to track your budget by quarter or by month depending on the level of detail you need.

	Q1	Q2	Q3	Q4
Website	$500	$500	$750	$500
Email Marketing	$200	$250	$200	$400
Advertising	$300	$300	$300	$300
Print Materials	$500	$500	$500	$1,000

Create a Marketing Calendar

A marketing calendar is one of the best ways to coordinate your marketing efforts. Your calendar should include all of the action items needed to successfully execute your marketing plan. Start by listing your major marketing tent poles (such as a website redesign, fundraising campaigns, and events), and then fill in all of the tasks you must accomplish to make them happen. Include any regularly occurring outreach, such as newsletters or member updates. You may wish to organize your calendar by audience, channel, or specific program.

	July	August	September	October	November	December
Website	Website QA	Testing w/ Donors	Website Relaunch	Pet Health Month	Year-end giving update	DonateNow homepage takeover
Newsletter	Dog Days adoption event	Adoption success stories	Website launch & contest	Pet Health tips	Donor & volunteer thanks	Year-end fundraising update
Ads/Media	Dog Days event in Post	Volunteer recruitment fliers	KUSA Local Stories Interview	Pet store outreach	Adoption gallery in *Post*	Donation and supply drive posters

Assign Roles

Clearly outline who will be responsible for each action item. Think about your tactics and plan who on your team will be responsible for managing and completing each item.

7. Measure and Track Your Results

A marketing plan that sits on the shelf is not particularly useful. You should regularly review your results to verify that your goals have been met or to determine if new strategies are in order. To round out your marketing plan, include the following:

- **Timeline:** How often will review your plans—monthly, quarterly, semiannually, annually?
- **Metrics:** How will you measure your success? Consider website analytics, e-newsletter subscriptions, and number of volunteers signed up. These metrics will be defined by what you want to accomplish. (Paws for the Cause might measure adoption rates, advertising impressions in Pets Weekly magazine, number of shelter volunteers, and so on.)
- **Evaluation:** Remember the primary research we accomplished in Step 1: Perform an Organization Self-Assessment? Revisit those audiences and see how your marketing activities have changed and/or improved your organization's situation.

Turn Your Assessment into a New Plan

As you determine how well your marketing initiatives are paying off, remember that this process is cyclical. Nonprofit technology expert Beth Kanter suggests these steps for turning metrics into action:

Step 1: Identify the goal or improvement. Paws for the Cause wants to increase adoption rates by 10% in the next 6 months.

Step 2: Identify the single most important metric. Number of adoptions.

Step 3: Explore it. How easy have we made it to get involved? What information have we provided to prospective owners? What resources do we give throughout the adoption process? If I call the shelter information number, will I receive helpful service?

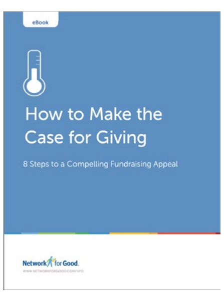
Step 4: Ask, "What if I did ... ?" What changes can you make? What holes did you find in your research? Could Paws use a new information request form on its website?

Step 5: Measure. What have the results been now that we've implemented changes and upgrades to the process of adoption and recruiting new pet parents?

Remember

- Be true to yourself and your audience!
- Analyze your past outreach to discover who truly makes up your distinct audiences.
- Celebrate your uniqueness by sharing your point of differentiation with your fans.
- Appeal to your audience's values with messages that are connecting, rewarding, actionable, and memorable.
- Don't just engage with your fans—inspire them!
- Measure your messaging to achieve your goals and tweak your strategies.

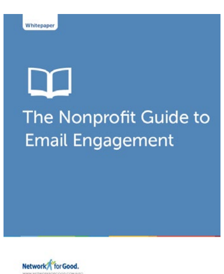
Learn More



How to Make the Case for Giving

Use these eight steps as a guide to help your organization craft a compelling case for giving. Packed with fundraising tips, this free guide will help you connect with donors and raise more money.

[Download this free guide now]



Nonprofit Guide to Email Engagement

Do your donors only hear from you when you're asking for money? It's time to revamp your engagement strategy. Learn how to craft an amazing welcome series and continue to inspire your supporters through email.

[Download this free guide now.]

About Network for Good

Network for Good powers more digital giving than any other platform. Since 2001, we've processed over $1 billion for more than 100,000 nonprofits. We are Level 1 Audited PCI Compliant and our Donor Advised Fund is accredited by the Better Business Bureau Wise Giving Alliance, meeting all 20 of its standards for charity accountability. Plus, we're registered in every state for online fundraising.

We're a mission-minded organization, like you, and we're passionate about seeing good causes succeed. We also believe in the power of communities to do great things.

Our online fundraising solutions come with all of the support and coaching you've come to expect from Network for Good. We're here to help you connect with donors and create more successful fundraising campaigns.

Ready to get even more from your online fundraising campaigns?

We've got you covered.

We'd love to hear about your fundraising goals and how you're reaching out to donors online. We'll offer suggestions on the tools that are right for your organization and show you some great campaigns for inspiration. To schedule a demo or find out more, **contact us today: 888.284.7978, option 1**

Or visit us online to reserve a time with one of our fundraising consultants.

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