

CREATING A MARKETING PLAN

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ABOUT MARKETING...

Can we apply “marketing” to our noble work? Is that gross?

Marketing is a tool – tools are neutral. We are TRYING to persuade people, after all.

Marketing is respectful (when done well)

Marketing is efficient

Customer service is also marketing

STEP 1:

PERFORM YOUR ORGANIZATION'S SELF-ASSESSMENT

Yeah, this is not the fun part.

Define your audience. Donors, volunteers, adopters, clinic clients, social media fans, vets, community members at large

Be honest.

How do you treat people?

IDENTIFY YOUR MESSAGES

What's your tagline?
Mission / vision statements?
(are they terrible?)
What's your elevator pitch?

HOW EFFECTIVE AND CONSISTENT ARE THEY?

Ask two staff and two volunteers,
“What does our organization do?
How are we different?”
Ask some donors and Facebook
fans these same questions.
What answers do you get? Are
they consistent?

DEFINE YOUR CHANNELS

What tools do you use, and how often?

- Your website
- Social media
- Paid advertising (google ads, print or online ads, etc.)
- Unpaid placement (PSA)
- Newsletter/email newsletter/direct mail
- Special events
- Brochures
- Annual report
- What else?

NOW EVALUATE.

Are your messages consistent?
Do you LIKE these materials? What would you change?
Does your self-perception **match** how others perceive you?
What balance do you have between fundraising/appeals versus other types of outreach?
How does your "tagline" differentiate you from other orgs that do the same thing?
What audiences are you missing?

**STEP 2:
SET GOALS
& STRATEGY**

GOAL: A "STATEMENT OF BEING" FOR A PLAN.

Objectives, strategies and tactics are the means to achieving a goal.

OBJECTIVE:

- More focused and specific
- Express results as measurable outcomes
- Objectives are the action/attitude/awareness you want to invoke
- Many objectives can support one goal

OBJECTIVES HAVE THREE CHARACTERISTICS:

- They identify a specific audience being addressed
- They state a measurable outcome
- They set a time frame

STRATEGIES: WHERE THE RUBBER MEETS THE ROAD

- HOW you accomplish the objectives
- Several strategies to accomplish one objective

TACTICS: SPECIFIC TOOLS YOU USE TO IMPLEMENT STRATEGIES

- Press release
- e-newsletter
- blog
- website
- survey
- focus group
- video
- Facebook

IDENTIFY A TARGET AUDIENCE AND THE DESIRED ACTION.

- Local pet owners with unaltered pets: **Desired action**—spay/neuter their pets.
- One-time volunteers: **Desired action**—become a regular volunteer.
- Community members who don't know about you: **Desired action**—visit your website and sign up for your newsletter.

GOAL: END NEEDLESS EUTHANASIA

- Objective: increase spay/neuter
- Objective: decrease pet store/breeder purchases
- Objective: increase adoption
- Objective: increase RTO
- Strategy: educate more people about spay/neuter
- Strategy: Make it easy for people to get pets to clinic
- Strategy: Make adoption the first choice
- Tactic: create billboard campaign promoting spay/neuter
- Tactic: go door-to-door with info/discount cards for clinic
- Tactic: hand out free ID tags at all events

HOW ABOUT YOU?

WHAT ARE SOME TARGET AUDIENCES AND ACTIONS YOU'D LIKE THEM TO TAKE?

Think small segments—it's easier to develop messaging and strategies for specific groups.

**STEP 3:
DETERMINE
YOUR UNIQUE
VALUE**

IN MARKETING, WE CALL THIS YOUR "UNIQUE VALUE PROPOSITION."

What makes your group the ONLY one of its kind?

5 WS AND AN H:

- Who (are your constituents)**
- What (is your issue area)**
- When (do they need you)**
- Where (are your constituents located)**
- Why (are you important)**
- How (are you different)**

FOR EXAMPLE:

- Who (are your constituents)**
 - Adults, men and women, families
- What (is your issue area)**
 - Animal rescue/welfare
- Where (are your constituents located)**
 - Residents in Enid, OK and surrounding areas
- When (do they need you)**
 - When they need to rehome a pet, they have found a stray animal or would like to adopt a pet
- Why (are you important)**
 - We save lives of animals in our community
- How (are you different)**
 - All dogs we adopt are certified Canine Good Citizens

GET AN OUTSIDER'S OPINION.

Ask a volunteer—why do they volunteer with you instead of ABC Shelter down the street?

What they say may be very different than what YOU think it is

“OUR ORGANIZATION IS THE ONLY _____ THAT _____.”

Can you complete this phrase?
Who are you serving that one one else serves, and/or how are you doing that differently?

IF YOU CAN'T FIND ANYTHING TRULY DIFFERENT OR UNIQUE THAT YOU OFFER THAT NO ONE ELSE OFFERS, WHY DO YOU EXIST?

Because you had a disagreement with the rescue you used to belong to so you started your own?
Think about whether the population is best served by dozens of small groups, each relatively ineffective, or larger groups and coalitions working together?

FIND YOUR SWEET SPOT

This is the intersection of:

- What your org does best
- What's important to your audience
- What you're doing that NO ONE else is



STEP 4:
CRAFT YOUR MESSAGE

NOW YOU KNOW WHERE YOU'D LIKE TO GO. HOW DO YOU GET THERE? APPEAL TO YOUR AUDIENCE AND ITS VALUES.

PUT YOUR AUDIENCE FIRST. IT'S NOT ABOUT YOU.

YOU marketing: communication is centered on your organization.

- We do this
- We accomplished this
- We need this
- We want to do this
- Our goal is this
- Here's our story
- Here's our staff

PUT YOUR AUDIENCE FIRST. IT'S NOT ABOUT YOU.

ME marketing: communication is tuned into ME as the consumer. It considers

- What I want
- What I need
- How I can help
- What is meaningful to me
- What are my values
- What I'm looking for
- Where my knowledge level is

DOES YOUR WEBSITE, YOUR BROCHURE, YOUR FACEBOOK PAGE, TALK ABOUT YOUR MISSION, YOUR GREAT STAFF, YOUR AWARDS, YOUR PROGRAMS?

HOW CAN YOU CHANGE IT TO INCLUDE MORE “ME MARKETING”?

MAKE SURE YOUR MESSAGES CRAM GOOD CONTENT:

CONNECT to things your audience cares about. (saving a life, being a good pet owner, etc.)

Identify and offer a compelling **REWARD** for taking action. (I'm a good person because I support this organization.)

Have a clear call to **ACTION**. Easy, specific, clear, possible. They should measurably advance your mission.

Make it **MEMORABLE**. Different, catchy, personal, tangible, desirable. Closely tied to your cause.

WHAT MAKES A GOOD CALL TO ACTION (CTA?)

BE HIGHLY SPECIFIC.

“Stop animal overpopulation!”

vs.

“Forward this email to five friends to encourage them to learn more about low-cost spay/neuter services.”

BE FEASIBLE.

The action you request must be EASY.

Small “yesses” lead to bigger “yesses”

Personalize your messaging. If I donated \$10 8 months ago, don’t ask me for a \$2,500 gift right now.

GIVE PEOPLE OPTIONS.

Not everyone can do the thing you ask ***RIGHTTHISSECOND***. Give them a second option.

If they say “no” to your first request (give us \$25), they are more likely to say “yes” to a secondary request (sign up for our email newsletter”)

BE "FILMABLE."

Illustrate what the audience will be doing if they say "yes" to your request.

Help them visualize what they'll be doing; answer all their questions.

Thorough information eliminates resistance.

DO CROSS-CHANNEL PROMOTION

Email, postal mail, phone, etc. make these parts work together.

This means incorporating similar design, messaging, coordinating timing.

Cross-promote with other organizations as well, when applicable.

MAKE IT A CONVERSATION

Be sure that all online outreach promotes and enables two-way conversations with supporters AND new people (and even skeptics/critics, as appropriate)

SHOW ACCOUNTABILITY

Make it clear where the money goes
Show results
Be honest

SEGMENT YOUR LISTS

Talk with supporters differently depending on who they are, how they give, their age, preferences, the way they support you, etc.
If you don't know this information, consider a donor management database and/or email marketing software

ASK PEOPLE TO BE MESSENGERS.

Ask supporters to help spread the word to their own friends and family. **We trust a message a lot more from someone we personally know.** Give people the tools to promote your message.

STEP 5: CHOOSE YOUR TOOLS

There's no one "right" or "magic" mix
Ask your supporters what tools THEY like and use
Look at your stats to know which ones work best for YOU
You don't HAVE to be on every social media platform

WHAT ARE SOME ONLINE TOOLS?

Website
Social media (Facebook, Twitter, Instagram, etc.)
Paid advertising
PR placement on other websites, blogs, news sites
Special event landing pages
Online donation pages
Email outreach

WHAT ARE SOME OFFLINE TOOLS?

Printed collateral (brochures, annual reports)
Direct mail
Newsletters
Paid advertising (posters, billboards)
PR Placement (radio, TV, newspapers, magazines)
Phone bank/telethon
Special events
Talking to people

HOW DO YOU CHOOSE?

- What are you already doing? Is it working?
- What do you LIKE to do?
- Do you have a person(s) dedicated to doing this?
- What does that person like to do?
- Where are your supporters and your targets?
- What works for other orgs like yours?

STEP 6:
**DEFINE BUDGET,
 TIMELINE AND
 RESOURCES**

SET YOUR BUDGET

- Word of caution: you often get what you pay for
- Be realistic; you DO need some budget
- This is not “taking money away” from the animals
- It’s spending a little to get a lot in return
- Your dollar goes further if you plan well

CREATE A MARKETING CALENDAR

Editorial calendar– I'll give you a template all set up!

Outline all major events and milestones in the year

Fill in the tasks you must do (and who will do them) to make those events and milestones happen

Fill out what media/marketing support each one will need, and frame out your strategies around that

ASSIGN ROLES

You cannot and should not do this all yourself

Assign tactics to personnel by strength & preference (volunteers, staff, outside contractors, etc.)

**STEP 7:
TRACK AND MEASURE RESULTS**

TIMELINE

How often will you review your plans to see how they are working? Monthly? Quarterly?

Who else will review them with you?

(This is not fun either)

But it gets more fun once you start seeing GREAT results!

METRICS

How will you measure your success?

- Website analytics
- E-newsletter subscription and open rates
- Number of volunteers
- Adoption rates
- Shelter intake rates

EVALUATION

Do a self-assessment again

What will you change next year? What worked well? What didn't?

Ruthlessly analyze so next year will be better

TURN YOUR ASSESSMENT INTO A NEW PLAN

Identify the goal or improvement (increasing adoptions)
Identify the single most important metric (number of adoptions)
Explore it (how easy have we made adoption? Are we giving good customer service?)
Ask, "What if we did...?" What changes can you make? What did you forget?
Measure. Are the results better now that we made some changes?

IN SUMMARY.....

Be true and honest to yourself and your audience!
Analyze your past outreach (on and offline) to discover your truly distinct audiences.
Celebrate what actually makes you unique.
Appeal to your audience's values with messages that are connecting, rewarding, actionable and memorable.
Measure your messaging to achieve your goals and tweak your strategies.

QUESTIONS?
