

Introduction

If you've picked up this handbook something has convinced you that a more formalized, proactive, well-executed marketing plan will benefit your nonprofit organization. The truth is, creating a results-driven marketing plan could possibly be one of the most beneficial steps you take in growing (or even sustaining) your organization. This handbook provides a step-by-step guide to a results-driven marketing plan for even the most novice of marketers.

While for-profit marketing resources abound, this handbook provides a much-needed tool to address the common challenges, roadblocks, and demands that nonprofit organizations face each day. From obtaining buy-in from spend-thrift board members, to maximizing limited resources, to learning from the best nonprofit marketers, this handbook is your essential tool for making every dollar count.

What Is Results-Driven Marketing?

A results-driven marketing plan arms you with research, focus, and evaluation tools to justify your marketing expenditures, report your results, and continually enhance your marketing program's effectiveness — all in order to help your organization reach and affect as wide an audience as possible. A results-driven marketing plan allows you to effectively leverage limited budgets and staff time, and it adds efficiency and strategy to your work to make the most of your limited time.

Results-driven doesn't strictly mean making sure every dollar spent brings in four dollars in return. It does mean that some short-term investments (such as determining your organization's market positioning or modifying your Web site) are necessary. At times, it also involves taking risks with marketing tactics you may not have used before. But results-driven also means a level of accountability and proactive, long-term strategy that your organization may not have used in the past.

Results-driven means putting the plan before the collateral material. It means that prior to determining the tactics you'll use to promote your services, you first define what makes your services remarkable. It means you carefully assess the needs of your target markets, determine measurable objectives, and carefully evaluate what you've done in the past so significant improvements can be made.

Results-driven marketing also means remaining accountable to your administrators, board members, and stakeholders via regular evaluation and reporting methods that link your marketing results to your organization's ability to meet its mission. It means paying close attention to all costs involved, while also using creative methods to produce greater efficiency and cost savings. And results-driven also means a heightened level of flexibility. It means moving outside the box of “we've always done it that way” and toward a willingness to shift tactics when they are simply no longer doing the job.

“But we're here to help people, not sell things ...”

A common perception amid nonprofit administrators is that marketing simply involves in-your-face sales and/or pricey, glossy collateral materials that will appear frivolous or wasteful to constituents. While nonprofit industry's overall investment in marketing continues to grow, obtaining buy-in from administrators and board members also continues to be one of the biggest challenges for marketers.

In this handbook you'll find excellent ideas and tools for obtaining buy-in for your marketing plan, retaining financial support by staying accountable, and reporting your impact in terms your administrators and board care about most.

Top Mistakes to Avoid and Save \$\$ in the Process

Over the last decade, I've reviewed more than 100 nonprofit marketing plans representing a wide range of industries. Over and over, I observed the same mistakes. And over and over, not surprisingly, these marketing plans proved to be either ineffective or not nearly as effective as they could be.

Here are some of the most common mistakes you should aim to avoid when creating your marketing plan:

- **The “Random Selection” approach** — Perhaps the most common mistake organizations make is creating a marketing plan without any defined measurable objectives. In other words, the plan is simply a list of tactics (e.g., design a brochure and distribute it to 2,000 patrons; distribute an e-newsletter once per quarter; run ads in the annual conference program) without any connection to objectives the organizations would like to achieve as a result. I call this the “random selection” approach because without matching tactics to the objectives you want to achieve, tactics are often

selected for the wrong reasons. Without measurable objectives, how do you know which tactics are the best use of your limited budget? And further, how will you justify the expenditure to your administrators and board members?

- **The “Same as Always” approach** — One common mistake is to keep using the same promotion tactics simply because “it’s what we’ve always done,” without evaluating the tactics’ effectiveness or conducting a cost-benefit analysis (e.g., does it cost \$2,000 to implement a publication that only brings in \$500 of revenue?). Nonprofits who use the “same as always” approach often fail to continually evaluate the needs of their target customers, or to integrate the latest technology, communication methods, and tools that can help them achieve their goals more cost-effectively.
- **The “Fun with Graphics” approach** — Another common mistake is to become tied to a specific promotional piece, such as a brochure, before fully evaluating your target market’s needs. I call this the “fun with graphics” approach because in this scenario the desire to be creative typically takes precedence over the specific outcome you want to achieve for your organization (e.g., to increase revenue from training programs by 20%; to increase membership by 30% by the third quarter). More often than not, this approach leads to marketing materials that simply are not used or that are not nearly as effective as they could be — often resulting in significant waste of valuable resources. When you evaluate the needs of your target market, you answer critical questions that influence the tactics and messaging you choose (such as what needs does your market have, where do people buy, why do they buy, and what has the biggest impact on their decision to buy).
- **The “No Compass” approach** — A fourth common mistake is a marketing plan that doesn’t include any strategies for evaluating progress in reaching your objectives. Marketers with no compass miss opportunities to redirect or stop using a tactic that simply isn’t doing the job. And they miss opportunities to expand tactics that are more successful than they’d hoped. Many nonprofits have a perception that evaluation is far too time-consuming to be cost-effective. However, in today’s technology-driven world, evaluation has never been easier or less expensive. Before the Web, we had to guess how many people were reading our print publications; today Web analytics help us easily break down who opened the publication, what they read, and what action they took in response. This handbook includes a wealth of ideas and tools to make evaluation easy, cost-effective, and a central part of your ongoing marketing program. Without evaluation, you’ll never be able to fully justify

your expenditures, and you'll miss the opportunity to redirect or continually strengthen your marketing program along the way.

How to Use this Handbook

This handbook serves as your step-by-step guide to create a results-driven marketing plan, and accordingly, a results-driven marketing program. Whether you're a seasoned marketer, or marketing is just one of the many hats you wear in your organization, this handbook will help you significantly enhance your ability to maximize your given budget for optimum results.

In **SECTION 1**, the handbook guides you to conduct basic marketing research to identify how you want to position your organization and/or your products and services to your customers. Surprisingly, many nonprofits dive into marketing their organization before they get crystal clear on what sets them apart from the competition, what specifically it is that they are offering or selling, what's the best method for delivering what they offer, and what unique and vital need the organization or services meet in the community.

Membership organizations and nonprofits funded by donors or sponsors will also find this section critical. In this section, you'll run through several exercises to clarify this information; then you'll use it to drive both your messaging and the focus of your marketing plan.

In **SECTION 2**, you'll take a step back to conduct a full evaluation of the current resources and strengths of your marketing program, everything from skills to availability, and workflow processes. You'll also fully evaluate the effectiveness of your existing print and electronic publications to see which are working and which need improvement.

In **SECTION 3**, you'll take your market positioning research and use it to create a simple, easy-to-use marketing plan. Using a basic template and samples as your guide, in a matter of days you'll have a plan in hand that is more strategic and focused than any you've ever had before.

In **SECTION 4**, you'll use our ideas and tools to obtain buy-in for your marketing plan from your administrators and board of directors. And, you'll customize our project-tracking and reporting tools to keep leadership apprised of your progress each quarter — a critical step to retain financial support for your marketing program.

In **SECTION 5**, you'll find a series of valuable articles filled with tips and

guidance for addressing some of the most common marketing challenges that nonprofits face. From leveraging your valued volunteers as your marketing ambassadors to getting past the “no-budget myth,” you’ll find great ideas to address these challenges head on. You’ll also find a myriad of proven, low-cost, high-return marketing tactics from some of the country’s leading nonprofit organizations.

The **APPENDICES** contain a wealth of samples and resources that will guide and support your marketing plan development. Find sample marketing plans representing three major types of nonprofit organizations — the service-driven nonprofit, the product-driven nonprofit, and the membership-based foundation. Each plan also includes a sample executive summary, sample project plan, and evaluation brief.

NOTE: The sample marketing plans included in the Appendices do not include organization names or any proprietary data or ideas of actual Numa Marketing clients.