

Marketing/Communications Plan Template

for your non-profit organization

Marketing and communications is often a challenge for non-profit volunteer organizations. Effective marketing and promotion will benefit your organization in many ways and the community will benefit by knowing more about the services you provide and what you have to offer. The good work of your volunteers deserves to be promoted and your stories will have lasting value. Your audience and customers will appreciate being engaged and will have a better understanding of what you do and how you benefit them.

Small or volunteer-run organizations often do not have the capacity to take on business and planning practices such marketing therefore this simplified template has been designed to help. It includes the key areas you need to explore your current situation, identify opportunities and take on activities that best suit your needs. A complete marketing plan would include a few more sections, however this has been narrowed down to take you through the essential planning processes and generate solid actions.

If your organization is involved with, or needs to take on any of the following actions, this template will help you accomplish:

- Engaging with your audience
- Getting people to attend your event
- Building your reputation in the community
- Communicating information from your board to your members
- Raising funds
- Persuading funding organizations to see value in your services
- Using your budget wisely and keeping costs down
- Ensuring effective use of limited time & resources

This template covers the following components of a marketing/promotional strategy:

- Background & issue
- Your current situation (PEST & SWOT)
- Purpose & objectives
- Your audiences
- Key messages
- Strategies
- Activities / tactics (channels)s
- Budget & resources
- Evaluation & monitoring

1. Background and issue

Describe your organization, add some facts about why a communications response is necessary and state the issue to be addressed.

Create a background statement describing your organization.

(Organization name) _____ does (what) _____

to serve (who) _____ at/in (where) _____

and by doing this provides (describe benefits) _____

for _____.

You can add additional details providing a brief history, a description of your organization’s main functions and where it operates. Keep it brief and use the information in all of your communications.

Describing the issue: List facts about the issue to justify the need for a communications response

What is the issue to be addressed and why is this issue of concern?

What is the intended impact?

What is the behaviour change you want to promote? (if applicable)

Other facts?

Example of an issue statement: *Use of the local Food Bank is growing. A marketing campaign will address the need for more volunteers and donations. While food banks were originally intended to be a temporary measure there is strong evidence that they have become an important part of a community’s social fabric. Supporting the food bank supports people facing economic challenges, which in turn contributes to more social connection for vulnerable families and individuals, better learning outcomes for students, less crime and healthier people.*

2. Your current situation

A look at external factors that may impact your work or your communications campaign.

- What is happening or may happen that can affect or influence successful implementation of the communications plan? (e.g. links or connections to others with similar objectives; upcoming events that are opportunities or competition; unique qualities or expertise; risks and vulnerabilities).
- What is going on in your community?
- What is occupying peoples’ minds?
- What is your audience concerned about? Talking about?

Tools to help assess your current situation: PEST and SWOT

PEST analysis (Political, Economic, Social and Technological)

Positive or negative factors; issues that may impact how your organization operates.

<p>Political: <i>Example: Municipal election – need to build contacts with new Council.</i></p>	<p>Economic: <i>Example: Downturn affecting local jobs; donations are down and food bank use is increasing. Review budget.</i></p>
<p>Social: <i>Example: Many new retirees moving to the community – need to find ways to connect and assess their volunteering interest.</i></p>	<p>Technological: <i>Example: Many people using social media yet about half of our members still rely on email and telephone – develop outreach and communications plan that incorporates many channels.</i></p>

SWOT analysis (Strengths, Weaknesses, Opportunities and Threats)

Assess these in terms of your communications priorities.

- How can threats be turned into opportunities? How can you play on your strengths and overcome weaknesses?
- What are your organization’s communications strengths? What has been successful and what hasn’t worked?
- Who has common objectives and can help promote you and validate your work? Think about potential for partnerships.
- What is your competition? Consider how to position your product to be more attractive than the competition.

<p>Strengths: <i>Example: We have a solid volunteer pool of dedicated and enthusiastic people.</i></p> <p>What resources and assets do you already have? What do you do best? What has been successful that you can build on? What unique qualities or expertise do you have?</p>	<p>Weaknesses: <i>Example: Insufficient budget for promotional materials.</i></p> <p>What do you need to review and address? What needs action before you can start? What are vulnerabilities and risks?</p>
<p>Opportunities: <i>Example: Develop creative ideas for low-cost and no cost promotion.</i></p> <p>What events/channels can you piggyback on to promote your issue? Who could you use as a champion?</p>	<p>Threats: <i>Example: Competing communications from other organizations.</i></p> <p>What is your competition? How can you position your organization to be more attractive? How can you influence your competition to work together for mutual benefit?</p>

3. Purpose and objectives

Decide what you want to accomplish. What are your communications objectives and goals? This can be as narrow or broad as you wish, depending on your time and resources.

This strategy will inform / persuade (WHO) _____ about (WHAT) _____
 _____ in order to (DO/ACCOMPLISH WHAT) _____
 _____.

Purpose example: *This strategy will inform new members to the community about the benefits for volunteers in our organization in order to attract new volunteers.*

List your measurable objectives (about 3-5 keeps it simple and focused)

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Examples of measurable objectives: Gain 100 likes on Facebook by June 30. Persuade five current volunteers to get a friend to join by the end of the year. Showcase our successes by having five stories published this year.

4. Your audiences

Who is the audience you wish to reach? They may include your members, your board, people you want to attract to your fundraiser or event, or organizations who provide grants. Once you define the audiences you want to reach, each may require a personalized message or promotional tactic.

Consider:

1. Who is your main (primary) audience, where do they or could they receive information about your organization and what do they need to know? *Who will this reach? Who is affected? Who is involved? Who will benefit? Who is connected? Describe who they are and what they need to know.*
2. Who do you want to attract as an audience? Where do they receive information?
3. Who influences your audience (e.g. media, bloggers, frequent contributors to social media)?
4. Where are the best places (physical and digital) to reach your audience?

Audience segmentation: Can you cluster your audience into groups based on geographic areas (regions, neighbourhoods); demographic factors (age, life stage, gender, education, culture, religion, language, urban, rural, suburban, isolated); psychographic factors (attitudes, beliefs, values, opinions, hopes, fears, needs, desires, personality)? *E.g. health-conscious moms; active retirees.*

Primary audience(s) – the people you want to reach directly

Which group(s) should be the primary audience? (internal and external to your organization)

e.g. Members, grant funding organizations, donors, board, service users

Secondary audience(s) – the people who influence or communicate to your primary audience

Which group(s) should be the secondary audience?

e.g. Stakeholders, media, other community groups, local MLA or councillors

5. Key messages

Key messages are the words used to communicate with your audience. When crafting key messages consider: what messages will have a strong meaning for your audience(s)? What is important to them? How will they benefit? What do you want them to believe?

Your message can be a call to action: What do you want them to do? *e.g. Attend the fundraising auction; Check out our new website.*

What are the messages you want to communicate? Narrow down to no more than three for most impact.

Keep your messages simple: about three-four sentences of 15-20 words each, using simple language.

Crafting messages for your audiences – a tool to help:

Audience	What they need to know	Key message examples
<p>Example: Service user</p>	<p><i>What we offer</i> <i>How to access services</i> <i>Where to go for information</i></p>	<p><i>Find useful, practical information on our website</i> <i>You can rely on us for trustworthy information</i> <i>We value your opinion</i></p>

6. Strategies

High level statements about each activity. Strategies describe how your objectives will be achieved.

Example:

Objective: Build a higher profile of our organization in the community through in person appearances and creating an online presence by the end of the year.

Strategies: Launch new website/blog and promote through social media channels; appear in a panel discussion to profile our organization's areas of expertise and services; stage a bottle drive event in a visible location on the roadside to activate our members and engage the community in supporting a valuable cause; promote these activities through local media and social media channels.

List strategies to meet your objectives:

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7. Activities / tactics

Tactics are ways to deliver a message and put your plan into action by describing what will be done, timing, costs, what will be made and what needs to happen. They include using media and other channels to reach your audience, face-to-face encounters, promotional collateral, websites

Consider all the ways your organization can reach its audience (add more if needed):

- Meetings
- Speaking at events
- Posting on social media
- Replying to mail/comments
- Announcing something new
- Responding to questions
- Holding a fundraiser
- Advocating for your members
- Talking to people
- Sending a newsletter
- Paid advertising
- News releases
- Staffing a table or booth at an event
- Posters
- Distributing promotional collateral material (pens, brochures, fridge magnets)
- Creating and updating a website
- Social media
- Educational opportunities to share your expertise (how-to guide or website/blog ; conduct a workshop; participate in a panel discussion; speak to a classroom)
- Partnerships (people/organizations with common objectives)
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8. Budget and resources

Your budget identifies how much time and money is needed for each activity. Include your time and time for others that will need to pitch in. Think about all the costs that will be involved: paid advertising, photography, printing. If it's a major event or undertaking, will you need any training to effectively learn to do it on your own or will you need to contract a consultant to help?

Consider: How much time or money (or both) does your organization have available to spend? Are there other resources you can draw on? e.g. volunteers who can contribute their expertise. Decide on what you have available to dedicate to promotion and whether it's time or money, don't commit to more than you can afford.

When you identify tactics and channels, don't let your current budget limit your thinking and creativity. Some items might go on the wish list for the future and you can continue to consider ways to meet your objectives over time if you cannot afford to do everything at once.

Budget: _____ (annual or monthly)

Examples of potential cost items: *URL domain name; paid advertising; fees to attend events; space rental at events; employing a professional photographer or artist for promotional graphics; hiring a communications professional.*

People available to help: _____.

Time available (per person): _____ (e.g. half hour per day; 2 hours per week; 4 hours per month)

Prioritizing: What are the communications you must do? What can't you live without? What can be donated? What are things you may not have time for now, but would like to consider in the future? Include in your plan and implement when you can.

9. Evaluation

Evaluation helps you understand how successful you were in reaching your objectives. It identifies what needs to change and what is working well. Ensure you have clear and measurable objectives to assess the impact of your campaign.

Monitoring is done shortly after a campaign is launched and while it is still running to see how things are going (e.g. your media coverage, new followers, likes on social media, comments you need to respond to). It helps you determine whether your messages are resonating with your audience.

Evaluation method examples: *surveys, interviews, media monitoring, number of coupons returned*

Identify how you will evaluate your plan:

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