

Successful Marketing Plan Pre-Workshop Homework: A Snapshot of Your Non-Profit's Current Situation

You will not be required to turn this homework in, but your effort in accomplishing it prior to this workshop will greatly assist you in creating a successful marketing plan and maximize your workshop experience. You will be referring to and using the information you collect during the workshop.

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.

I. Conduct a Short SWOT Exercise

(Strengths and weaknesses refer to characteristics that exist within your organization. Opportunities and Threats refer to outside factors that affect your organization.)

- a. Strengths

- b. Weaknesses

- c. Opportunities

- d. Threats

II. Describe your target audience

- a. Demographics
 - i. Age
 - ii. Sex
 - iii. Family composition
 - iv. Earnings
 - v. Geographic location

- b. Lifestyle
 - i. Are my customers conservative or innovative?
 - ii. Leaders or followers?
 - iii. Timid or aggressive?
 - iv. Traditional or modern?
 - v. Introverted or extroverted?
 - vi. How often do they respond to communication?
 - vii. Other Lifestyle that describe your target audience:

- c. Describe who your existing above average donor is.

III. List your marketing goals.

- a. What do you want your marketing plan to achieve? For example, are you hoping for a 20 percent increase in donations through a specific effort? Write down a short list of goals—and make them measurable so that you'll know when you've achieved them.

IV. Determine how *effective* and *consistent* your messages have been.

- a. Are your communications materials how you want them to be? What would you change?
- b. Does the way your organization perceives itself match the way others see it?
 - i. Ask two volunteers and two staff members, "What does our organization do? How are we different?"
 - ii. Ask a few of your donors these same two questions.
- c. Are your communications heavily weighted on fundraising versus other types of outreach?
- d. Does your tagline differentiate you from other organizations that focus on similar issues?
- e. Were there any audiences you hadn't considered or spoken to directly prior to this fact-finding?

V. Define Your Channels

- a. Which communication channels do you use and how often?
 - i. Organizational website
 - ii. Social media (Facebook, Twitter, blogs, and so on)
 - iii. Paid advertising (Google AdWords, print or online banner ads)
 - iv. Unpaid placements (PSAs)
 - v. Communications (newsletter, e-newsletter, direct mail)
 - vi. Special events
 - vii. Brochures
 - viii. Annual report
 - ix. Face-to-face interaction
 - x. Other