

# Creating the Two-Page Marketing Plan

A step-by-step guide

# Introduction

When you have completed this workbook, you will have a ready-to-implement two-page marketing plan. Two pages are all you need for a sharp, smart plan.

All the exercises in the workbook work together to help you build your plan one step at a time. With each exercise, focus on that one component. Put all other concerns aside. When you're done, all the pieces will fit together as a coherent whole.

Before you begin, you'll want to put some time aside to think through each exercise. It's helpful to have some thinking partners. Do the exercises in a group with other people from your organization. To figure out who those people should be, consider:

- Who has information and experience relevant to these exercises that can help me create this plan?
- Whose buy-in and approval will I need?
- What's the best way to involve them?
- What schedule might we commit to?

Turn the page to see a sample layout of the plan you will create.

## Sample Layout

<b>Brand</b>	
purpose	
benefit	
positioning	
personality	
values	
<b>Goals</b>	
business	
marketing	
communications	
<b>Target Audiences</b>	
today	
tomorrow	
influencer	
other	
<b>Marketing Strategies</b>	
price	
product	
place/distribution	
promotion/ communications	
message	

<b>Tactics Set 1</b>	<b>Description</b>	<b>Measurement</b>	<b>Budget</b>	<b>Timing</b>
gain attention				
<b>Tactics Set 2</b>	<b>Description</b>	<b>Measurement</b>	<b>Budget</b>	<b>Timing</b>
build interest				
<b>Tactics Set 3</b>	<b>Description</b>	<b>Measurement</b>	<b>Budget</b>	<b>Timing</b>
create desire				
<b>Tactics Set 4</b>	<b>Description</b>	<b>Measurement</b>	<b>Budget</b>	<b>Timing</b>
inspire action				
<b>Tactics Set 5</b>	<b>Description</b>	<b>Measurement</b>	<b>Budget</b>	<b>Timing</b>
continue conversation				

# What is Marketing?

We do it. Or we try. But what is it, really?

A good starting definition is simply this: all that goes into developing, promoting, persuading, selling, and distributing a product or service. This is true for you, too, if you are selling the idea of doing something – be it attending, donating, or participating in a program.

Most marketing efforts are ad hoc. We might buy that business card-size ad in our local paper – the same kind we’ve bought for the last fifteen years. Or the radio spot that the ad-sales rep says is a great deal. Or we might dabble with Facebook, because we believe social media is a requirement of modern marketing.

However, jumping to these tactical actions is putting the cart before the horse. Your choices might be right – the way that you advertise might be the most efficient and effective way to invest your efforts. But unless you have put some deliberate thought into why you are doing what you are doing, who you are doing it for, and what the benefit of your product for your consumer is, you could probably be doing a better job of marketing your product and your brand.

That’s where this guide comes in. It’s a step-by-step process for developing a smart, effective, and efficient marketing plan. This guide is specifically intended to help people and organizations with minimal marketing experience, tight budgets, and stressful timeframes produce a simple and easy-to-follow plan.

Yes, it will take some focused attention. But, it’s important that you take the time to think through your marketing options and set a plan for action. If you do this rather than jumping straight to disconnected tactics, you will:

- make better use of a limited budget – your money will go farther, and your results will be better
- get a jump-start next year and the years that follow – saving time and effort
- establish a plan others can follow – document knowledge and wisdom within the organization.

## Important Terms

A marketing plan has many parts and pieces, but they're nothing to be intimidated by. Each is important, as together they build a strong whole. As you work on the following exercises, refer back to these simple definitions. As you go, you will learn what these things are, and how these building blocks fit together.

In section or exercise introductions, these words appear in green to help you remember to look back at the definitions.

**Audience:** The people you're talking to with your marketing efforts. There are several industry terms to describe different audience types:

- **Target** – The audience you intend to focus on, or “target”
- **Primary** – Your highest priority audience group. Often the group you are impacting directly
- **Secondary/Tertiary** – The audiences that follow in importance. They could be secondary or tertiary in importance simply from the perspective of resource allocation. Or they could be so because they are not your *direct* customer, but they impact your success in some way
- **Influencers** – Though not a direct customer, this is an important audience group because they can help support your success. These audiences spread the word, or positively influence your primary audience in some other way

In using this workbook, we're going to keep things simple and ask you to identify three target audience groups:

- **Today** – the priority (primary) group of people you are currently serving, and want to continue serving
- **Tomorrow** – the priority (primary) group you do not currently serve, but you would like develop as an audience
- **Influencer** – the one priority influencer group most able to support your success

**Benefit:** The advantage a customer receives (or perceives that they receive) from participating or purchasing a product or service. Benefits can be very straightforward (savings, for example) or more emotional (pride, security, confidence, etc.).

**Brand:** This word means a lot of different things, including the mark made by a rancher on the side of a steer, and a logo placed on a product. For our purposes, we will use a more subtle and modern business definition. A brand is what you stand for in the minds of a customer/audience. You can also think of it as your image or reputation. Sometimes you make it happen through your marketing efforts (Volvo stands for safety), sometimes it happens to you (Volkswagen stands for cheating).

**Competition:** In the most traditional sense, these are rival organizations that compete for your audience – attempting to gain their attention, patronage, and participation. However, many other things can also compete for your audience’s attention, patronage, and participation. So we will be addressing two types of competition:

- **direct competition** – those organizations that compete with you traditionally
- **indirect competition** – other elements that get in the way of attracting and retaining your audience. This could be assumptions or perspectives, alternative activities or priorities, etc.

**Demographics:** A generalized statistical or factual description that defines your audience. The facts typically include: age, gender, family status, education, occupation, and location.

**Features:** These are the characteristics of a product or service, used to describe the product or service.

**Outcome:** The thing that you want to happen as a result of your efforts; the impact you intend to have over time.

**Persona:** A semi-fictitious character meant to bring an audience group to life. Personas are based on the demographic and psychographic information.

**Positioning:** Your customer’s perception of your brand or product relative to their perception of the competition’s brand or product. Think of it as the clear, unique, and advantageous position your brand occupies in your customer’s mind.

**Psychographics:** A generalized qualitative description of your audience. It paints a picture of their life with some depth, including dimensions like: interests, attitudes, opinions, habits, values, lifestyle, and any other elements that are important.

**SMART Goal:** A specific, measurable, achievable, relevant, and time-sensitive milestone. You might set multiple smart goals to achieve on your way to your outcome.

**Strategy:** The general method you will use to achieve your SMART goals and desired outcome – not to be confused with a specific tactic. Here are a few examples:

strategy: promote individual ownership of the arts  
related tactic: post video testimonials from clients

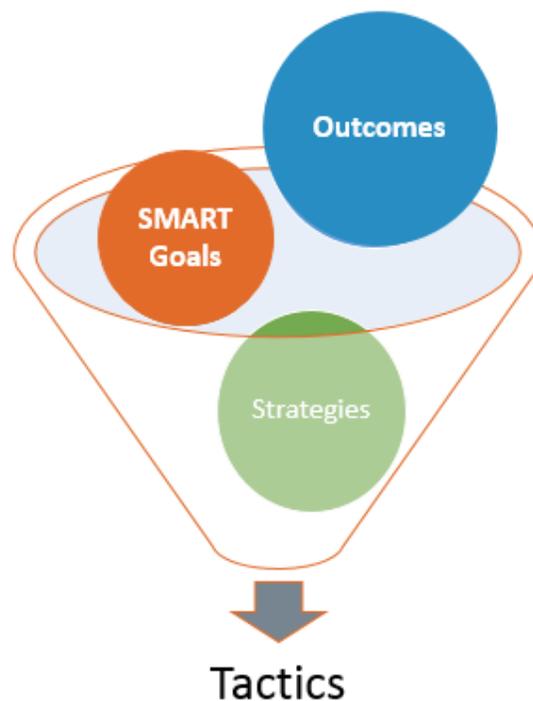
strategy: show the client how fun the arts are  
related tactic: hand out red clown noses on the street corner

strategy: make it easier for everyone to support the arts  
related tactic: launch a crowd funding campaign

There are always several strategies at your disposal; the challenge is to determine which strategy is the cleverest and will best help you achieve your SMART goal and desired outcome.

**Tactic:** The specific action to be taken.

The diagram below is a visual representation of how outcomes, SMART goals, and strategies work together to help us create the best possible marketing tactics.



Outcomes inform SMART goals, which determine which strategies will be most effective. Marketing is the process of considering all these things before jumping to a tactic.

# Part One

## **Building the Foundation**

In Part One, you will be exploring what makes your organization unique and important. This will help you define your purpose and your brand. You will also consider who will benefit from what you offer and how they will benefit. This will help you better understand your audience. And you will determine what goals you need to achieve.

Don't worry. We will get to the burning question, "But what are we going to DO?" in Part Two. For now, take your time and focus on Part One; a thoughtful and smart foundation will make for a much more effective plan of action.

## Brand | What is Your Purpose?

Sounds like a pretty basic question, doesn't it? Surprisingly, it's not one that organizations can typically answer. They might have a mission statement. Or a vision statement. Or both. However, these are generally aged, wordy, and open to interpretation. They can also be overly diplomatic – the result of a committee intent on capturing all opinions and preferred wording. Others are overly-intellectual and missing the fire of commitment. Many lie dusty on the shelf, or exiled to an obscure file on the company server.

### In this section ...

Think about why you do what you do. What impact are you trying to have on your community or the people you serve?

Don't get us wrong, vision and mission statements are important, and can be very useful. Perhaps your organization has done a great job crafting them and referring to them for critical focus and guidance. But now, we're going to help you crystallize your purpose, answering the key questions:

**Why does your organization exist?**

**What does it offer the community?**

What would be missing if your organization disappeared tomorrow? If the answer is "nothing," don't be too concerned. You have a great opportunity to push the envelope and find your purpose.

Are you stuck with an answer that is expected? Sanitized? Maybe even ... boring? Again, this is your chance to get real and push through to a purpose that is compelling to you, your team, and your audience.

The following worksheet will help you get there.

## **Step 1** Defining Your Purpose

Organization Name:

Vision Statement

*(Capture to the best of your ability)*

Mission Statement

*(Capture to the best of your ability)*

## Step 2 Five Whys

Now, considering all that the vision and mission represent, why is that important to your **audience**? Please use as few words as possible.

1. Why is that important?

Now, look at your responses. Ask yourself again, “why is that important?” Use as few words as possible, and follow this pattern for a total of five times.

2. And why is *that* important?

3. And why is *that* important?

4. And why is *that* important?

5. And, why is **THAT** important?

### **Articulate the Purpose:**

Circle the “why” you think is most important and inspiring. Wordsmith in the space below to capture your most powerful purpose.

### **Our purpose:**

### Step 3 Defining Your Purpose

Use this checklist to make sure you're on the right path:

- Is the description of your purpose short – ideally five words or less?
- Are the words simple and clear enough to avoid debate and multiple interpretations?
- Is the language powerful and inspiring?
- Is it true of your organization?
- Can it act as a rally cry, focal point, and decision-making filter?
- Is it beneficial and meaningful to those your serve?
- Do you have buy-in inside your organization?
- If not, do you have a plan for getting it?
- Capture this plan below:

## Brand | Who is Your Target Audience?

Who are you serving? Why do they care about what you have to offer? Are you actually reaching them in your communication efforts?

### In this section ...

Think about people:

- those you serve now
- those you want to serve in the future
- those who can help bring in new people

Don't be surprised if your answers aren't quite clear. Often we inherit assumptions about our **audience**, or fire off **tactics** without thinking through exactly whom we are communicating to and why.

Ideally you would have the time and money to conduct a thorough battery of market studies to identify and profile your various audiences. If you have that opportunity, let us know – we can help you plan it. But assuming this is not the case, use this

space to step back and use the wisdom around you to reconsider your options.

Use the following pages to think about the people you serve today, and whom you can serve in the future. Challenge yourself to think about them as real people. Become curious about what they are really like, and challenge assumptions.

Copy the following worksheets to think of as many possible audience groups as you can. Then use the prompts to make sure you rigorously determine which audiences you should spend precious time and money to target with your efforts.

## Step 1 Defining Target Audiences

First, use scrap paper to brainstorm about an audience using the following **demographic** and **psychographic** prompts. Remember, you probably have more than one audience. When you feel that you are done brainstorming, use the following worksheets to summarize three audiences.

Group Nickname \_\_\_\_\_

Group demographics

average age \_\_\_\_\_

family status \_\_\_\_\_

average income \_\_\_\_\_

location \_\_\_\_\_

gender \_\_\_\_\_

other \_\_\_\_\_

other \_\_\_\_\_

Group psychographics (general attributes about these people: what they care about, what they do for work, how they spend their free time, what values and beliefs they hold, what they think or feel about the arts, etc.)

Audience Type (circle)

today

tomorrow

influencer

Group Nickname \_\_\_\_\_

Group demographics

average age \_\_\_\_\_

family status \_\_\_\_\_

average income \_\_\_\_\_

location \_\_\_\_\_

gender \_\_\_\_\_

other \_\_\_\_\_

other \_\_\_\_\_

Group psychographics (general attributes about these people: what they care about, what they do for work, how they spend their free time, what values and beliefs they hold, what they think or feel about the arts, etc.)

Audience Type (circle)

today

tomorrow

influencer

Group Nickname \_\_\_\_\_

Group demographics

average age \_\_\_\_\_

family status \_\_\_\_\_

average income \_\_\_\_\_

location \_\_\_\_\_

gender \_\_\_\_\_

other \_\_\_\_\_

other \_\_\_\_\_

Group psychographics (general attributes about these people: what they care about, what they do for work, how they spend their free time, what values and beliefs they hold, what they think or feel about the arts, etc.)

Audience Type (circle)

today

tomorrow

influencer

## Step 2 Prioritization Scales

Use the prioritization scales provided for each of the **audience** groups described on the previous three worksheets. For each audience, consider the following statements and rate each statement on a 1 to 5 scale, where 1 is “not at all,” and 5 is “very much.”

Group Nickname \_\_\_\_\_

- |   |           |
|---|-----------|
| 1. This group will appreciate, and benefit from, our purpose: | 1 2 3 4 5 |
| 2. This group has reasonable access to what we provide:       | 1 2 3 4 5 |
| 3. This group is important to our current success:            | 1 2 3 4 5 |
| 4. This group is important to our future success:             | 1 2 3 4 5 |
| 5. This group can help spread the word to others:             | 1 2 3 4 5 |
| 6. We can afford to communicate with them:                    | 1 2 3 4 5 |

TOTAL: \_\_\_\_\_

Use this number to prioritize which audiences you speak to: the higher the number, the higher the overall importance. However, don't be a slave to the numbers; make sure you draw on the insights you've gained from this process as well.

Remember as a guide, you're looking for three groups:

- priority audience today
- priority audience tomorrow
- priority influencer group

Group Nickname \_\_\_\_\_

- |   |           |
|---|-----------|
| 7. This group will appreciate, and benefit from, our purpose: | 1 2 3 4 5 |
| 8. This group has reasonable access to what we provide:       | 1 2 3 4 5 |
| 9. This group is important to our current success:            | 1 2 3 4 5 |
| 10. This group is important to our future success:            | 1 2 3 4 5 |
| 11. This group can help spread the word to others:            | 1 2 3 4 5 |
| 12. We can afford to communicate with them:                   | 1 2 3 4 5 |

TOTAL: \_\_\_\_\_

Use this number to prioritize which audiences you speak to: the higher the number, the higher the overall importance. However, don't be a slave to the numbers; make sure you draw on the insights you've gained from this process as well.

Remember as a guide, you're looking for three groups:

- priority audience today
- priority audience tomorrow
- priority influencer group

Group Nickname \_\_\_\_\_

- |  |           |
|--|-----------|
| 13. This group will appreciate, and benefit from, our purpose: | 1 2 3 4 5 |
| 14. This group has reasonable access to what we provide:       | 1 2 3 4 5 |
| 15. This group is important to our current success:            | 1 2 3 4 5 |
| 16. This group is important to our future success:             | 1 2 3 4 5 |
| 17. This group can help spread the word to others:             | 1 2 3 4 5 |
| 18. We can afford to communicate with them:                    | 1 2 3 4 5 |

TOTAL: \_\_\_\_\_

Use this number to prioritize which audiences you speak to: the higher the number, the higher the overall importance. However, don't be a slave to the numbers; make sure you draw on the insights you've gained from this process as well.

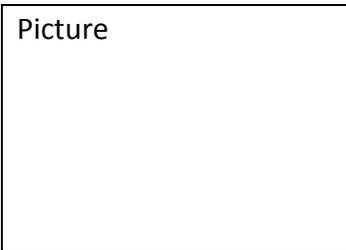
Remember as a guide, you're looking for three groups:

- priority audience today
- priority audience tomorrow
- priority influencer group

### Step 3 Develop Audience Personas

Create a **persona** to represent the high priority groups that you defined and prioritized above. A persona is a fictional character that reflects the demographic and psychographic dimensions, helping to bring this group to life for the organization. Create a persona for each of the three audiences.

Picture



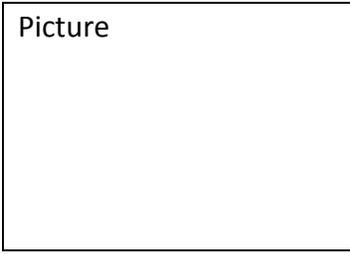
Name

Group

Their story



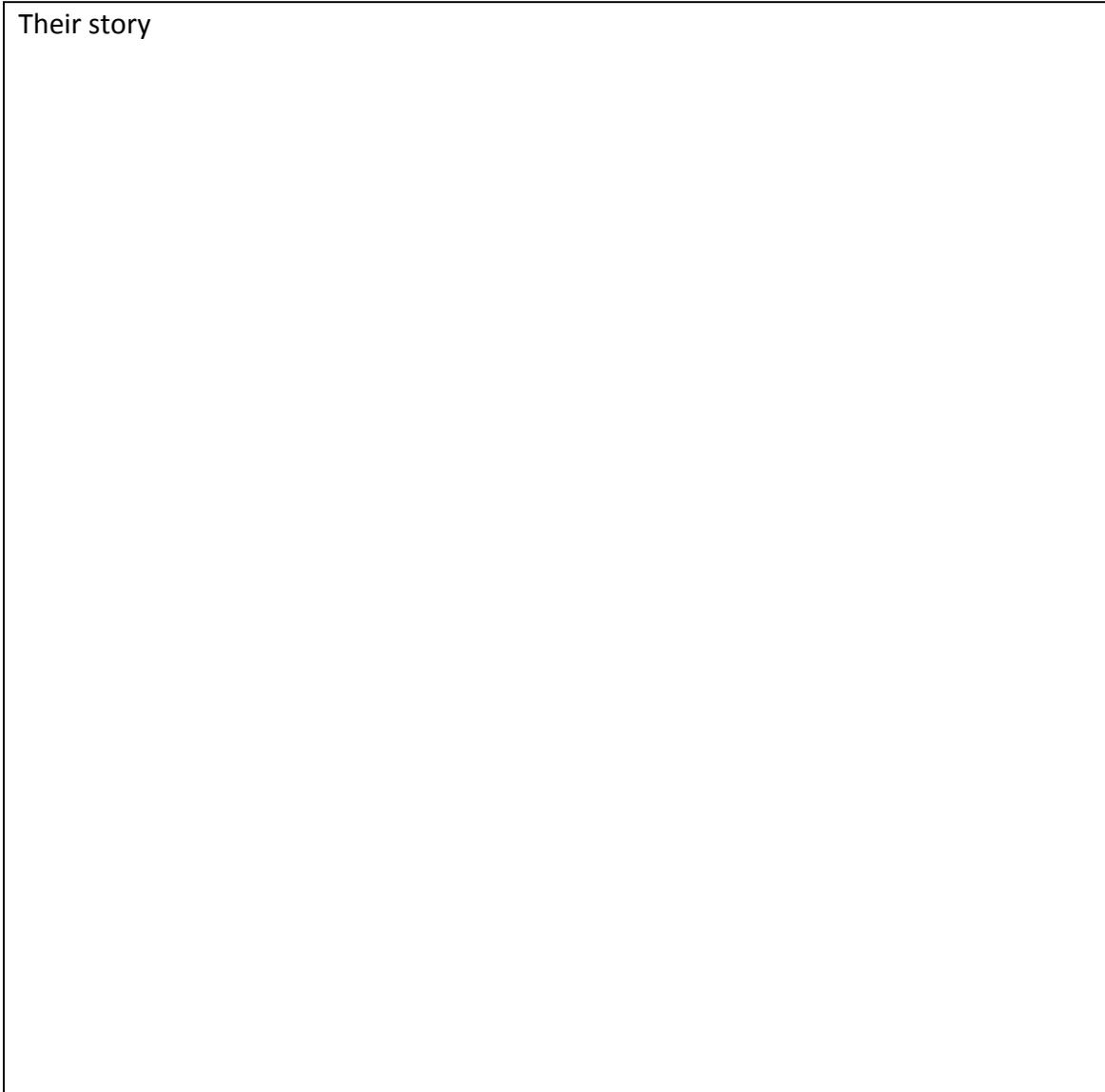
Picture



Name

Group

Their story



Picture

Name

Group

Their story

## Step 4 Explore a Day in the Life

We can get much more accurate in our communications with our audiences if we give more realistic thought to what they do, and what they are paying attention to during a typical day. Yes, media partners (radio stations, newspapers) can crunch the numbers and give their recommendations based on the demographics of our audiences, but that's only part of the picture. This exercise is bound to provide some "ah-ha!" moments.

**Persona** name/group \_\_\_\_\_

<b>A Typical Day</b> Where are they? What are they doing?	<b>A Typical Day</b> What are they seeing? Hearing?
6am	
7am	
8am	
9-11am	
12pm	
1-3pm	
4-6pm	
7-9pm	
10pm	
summary	summary

## Step 5 Target Audience Summary

Some organizations may determine more than three target audiences. An “other” is provided below to capture a fourth. For the two-page plan, we don’t recommend working with more than four target audiences.

To remind yourself of the definitions of these terms, see pages five through seven.

Today	Tomorrow	Influencer	Other
Demographics	Demographics	Demographics	Demographics
Psychographics	Psychographics	Psychographics	Psychographics
Day-in-the-life notes	Day-in-the-life notes	Day-in-the-life notes	Day-in-the-life notes

## Step 6 Defining Your Target Audiences

- Do you have a clearer sense of priority target audiences?
  - What are your priority groups?
    - priority audience today:
    - priority audience tomorrow:
    - priority influencer group:
  - Do you have a fuller image of who they are and what makes them tick?
  - Do you have a better sense of potential ways to communicate with them?
  - Capture some ideas below:
- 
- What else would you like to know about your audience?
  - What's your plan for finding out?

## Brand | What is the Benefit to Your Audience?

Just when you thought we were done talking about your customers ... there is one more crucial piece to explore. It's this: what is the benefit you provide your audience?

### In this section ...

Think about why your audience cares – or should care – about your organization.

Most organizations focus on themselves. They talk about what they do, how they do it, what they make. These are called **features**. But smart organizations focus on their audience, talking and thinking about how they help their customer. This is called the **benefit**. Here are some examples:

Features your organization offers		Benefits you offer your audience
low cost tickets	→	accessible programs
high cost tickets	→	exclusive membership
locally made art	→	sense of place/pride
non-local art of reputation	→	inspiration
non-profit memberships	→	community/sense of belonging

Now, let's practice talking in terms of benefits, rather than features. In the sentences below, circle the word or phrase that fits best:

A feature: Our organization provides anyone with **inexpensive matinee tickets** | **access to the arts**.

A benefit: Our online box office offers our audiences **convenience** | **reasonably priced tickets**.

A feature: Our organization provides **locally-made art** | **an authentic Vermont experience**.

A benefit: Our audiences enjoy **inspiration** | **high quality curated art exhibits**.

Yes, features are important. But talking about benefits helps your audience see quickly what's in it for them. Start with benefits, then use your features to prove that you can deliver on your promise; you're more likely to connect in a way that stimulates a desire to participate.

Remember: you likely have a handful of audience groups you'll be addressing. If you are planning distinct marketing efforts for each group it makes sense for you to do the following exercises for each group, as the benefit you offer each group is probably different. However, if this is not the case, you can decide which audience is the absolute priority and focus on them.



## Step 2 Building Benefits, From the Bottom-Up

Now that you're used to talking about benefits, let's figure out which of yours are most important, using this upside-down worksheet. Make sure to start at the bottom!



**STOP**

### Look here last ...

Somewhere below you hit the sweet spot: the promise that is resonate, important, powerful, and believable, but not promising your customer *too* much (like, "you'll die happy"). Which answer below is the most important benefit to your customer? Circle it, polish it, and capture it here.

1. FINALLY, what is the most important benefit of *that* to your audience?
2. And what is the most important benefit of *that* to your audience?
3. And what is the most important benefit of *that* to your audience?
4. And what is the most important benefit of *that* to your audience?
5. And what is the most important benefit of *that* to your audience?
6. What is the most important benefit you provide to your audience?



**Start**

**Look here first** and work your way up the page. Answer question six the best you can. To answer question five, replace "that" with your answer to question six. To answer question four, replace "that" with your answer to question five. And so on. This is a laddering exercise; each new answer builds on the previous answer. Make your answers as brief as possible.

## Brand | What is Your Brand Personality and Values?

Today's organizations seek to maintain relationships with their audiences. They do this by building a **brand** that is consistent, trustworthy, and relevant. A brand's personality and values are two good tools to use in developing relationships. Knowing how to clearly communicate brand personality and value will help people inside your organization deliver aligned and consistent messages about your product.

### In this section ...

Think about your brand: your organization's image or reputation. How do you want to be known by your customer?

These might already be articulated for you. If they are, great. Dust them off and polish them up. If not, the following worksheet will help you capture them. As you work, keep in mind the purpose and the ultimate benefit you've articulated above. These are all pieces of a puzzle that will create a meaningful relationship with your audience.

## **Step 1** Define Brand Personality and Values

If your organization was a car, which would it be?  
Why?

If your organization was a person, who would it be?  
Why?

If this person were invited to a party, how would they behave? Who would they talk to?  
What would they drink, eat? When would they arrive and leave? How would they dress?

Find a picture of someone you think represents this person well. Attach it here:

Take a look back at what you wrote and circle any words that show a pattern between these descriptions. Pay close attention to adjectives. Apply any more brainstorming and wordsmithing necessary and capture the following below:

- **Persona**

In 3 – 5 words, capture the person that best represents your brand.

- **Personality**

What three personality traits best represent your brand?

- **Values**

What key values guide your brand's actions?

## Brand | What is Your Brand Positioning?

You’ve done some great foundational work. You’ve articulated your purpose in the world. You’ve decided which audience groups are most important to speak to, and how they will benefit from this purpose. The brand **positioning** is the next step because it puts those two pieces together – the purpose and the benefit – and asks you to make sure what you’re claiming about yourself stands out as different.

### In this section ...

Think about what makes your organization different.

Think of the brand positioning in this way: the place you occupy in people’s minds that is different from the **competition** and relevant to your audience.

The piece of the puzzle we need to add to your thinking is how you’re different from the competition. Perhaps there are other arts organizations like yours trying to attract the same audience. How are you different from them? Why would people prefer to spend their time or money with you? Or perhaps you are challenged by indirect competition. Most likely, you’re faced with some of both.

Examples: <b>Direct Competition</b>	Examples: <b>Indirect Competition</b>
Other arts organizations <ul style="list-style-type: none"> <li>• local</li> <li>• state</li> <li>• regional</li> </ul> Entertainment options <ul style="list-style-type: none"> <li>• movies</li> <li>• dining out</li> <li>• sports/recreation</li> </ul>	comfortable routines assumptions about accessibility lack of familiarity/feelings of intimidation end of the day/week exhaustion family time/orientation concerns about money

People have a lot of options for how they spend their money and time. And they have many barriers they must get over before they are willing to experience what you offer. Facing these dynamics proactively will help you define a positioning that is enticing enough to help people overcome those barriers and chose you.

Don’t settle for a vanilla position and become as non-descript as one of the many vanilla ice cream options in the vast freezer section. You, too, can stand out as bold and enticing as Ben & Jerry’s New York Super Fudge Chunk.

## **Step 1** Explore the Competition

List your **direct competition**:

Brainstorm some indirect competition:

On which features are you competing?

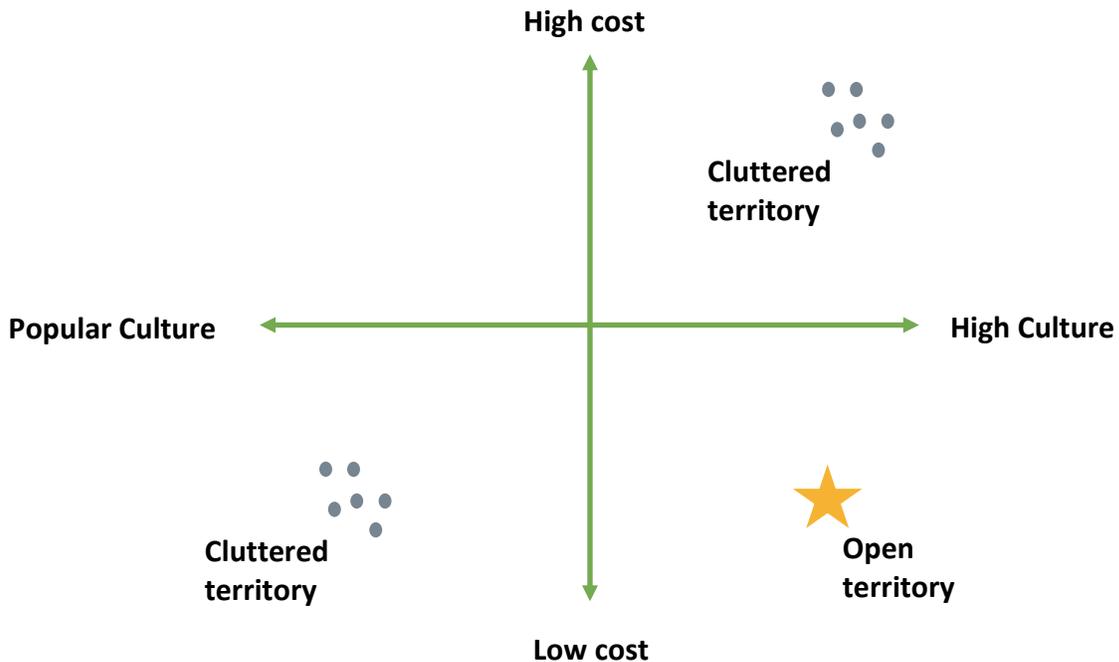
Now, how do you stand apart from the competition based on different characteristics?

If you don't stand apart from your competition, what are some open territories you could move into that would make you stand out?

**Explore all these questions further with the next exercise.**

## Step 2 Territory Mapping

Think of the general characteristics of your type of organization. What claims are typically made by organizations like yours? In what areas do you compete? Some examples might be: low cost vs. high cost; convenient vs. inconvenient; virtual vs. physical; digital vs. analog; accessible vs. inaccessible. Make them specific to your situation.



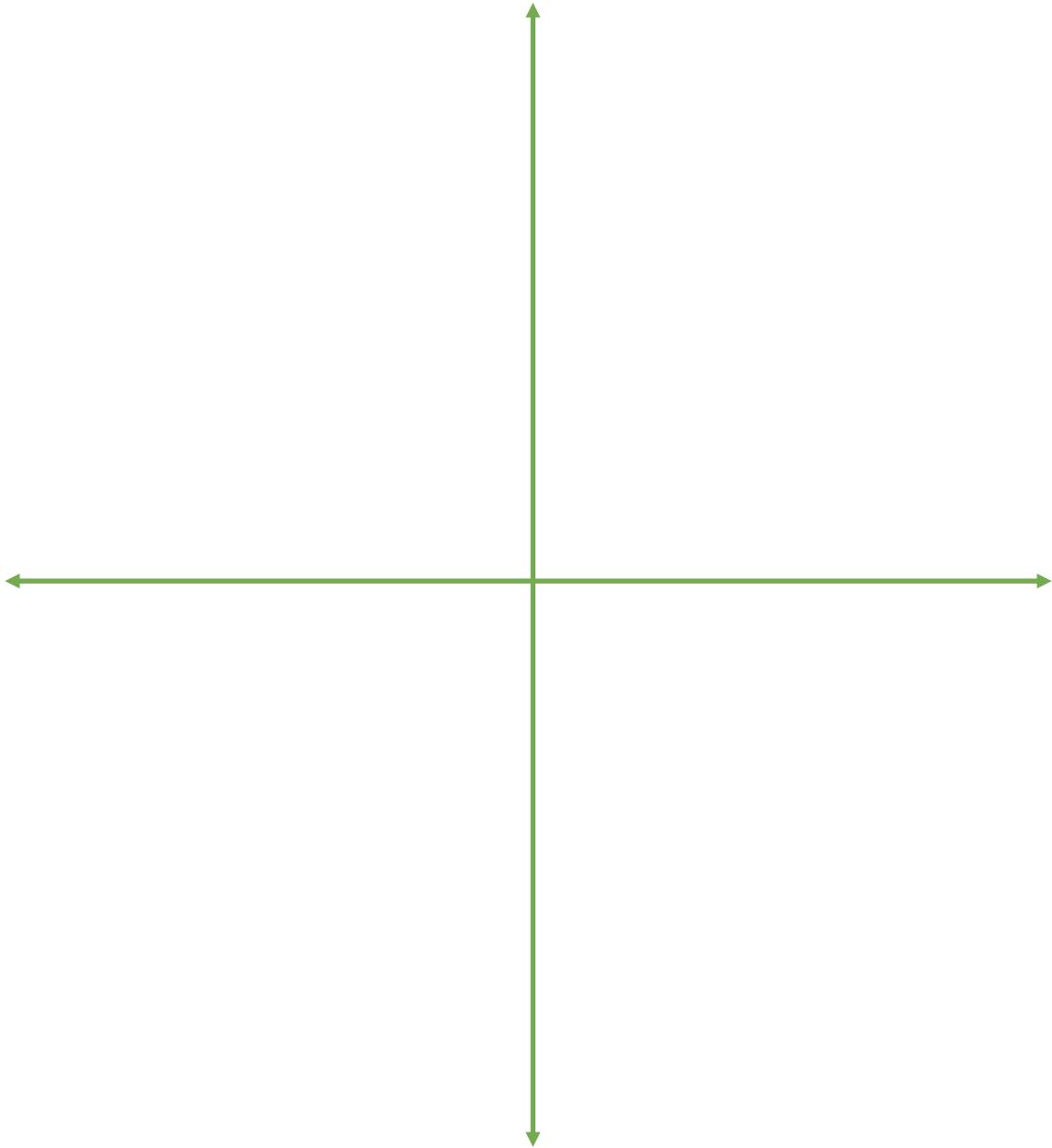
Map these on the axes provided in the following pages. Then plot where the competition is in relation to those characteristics.

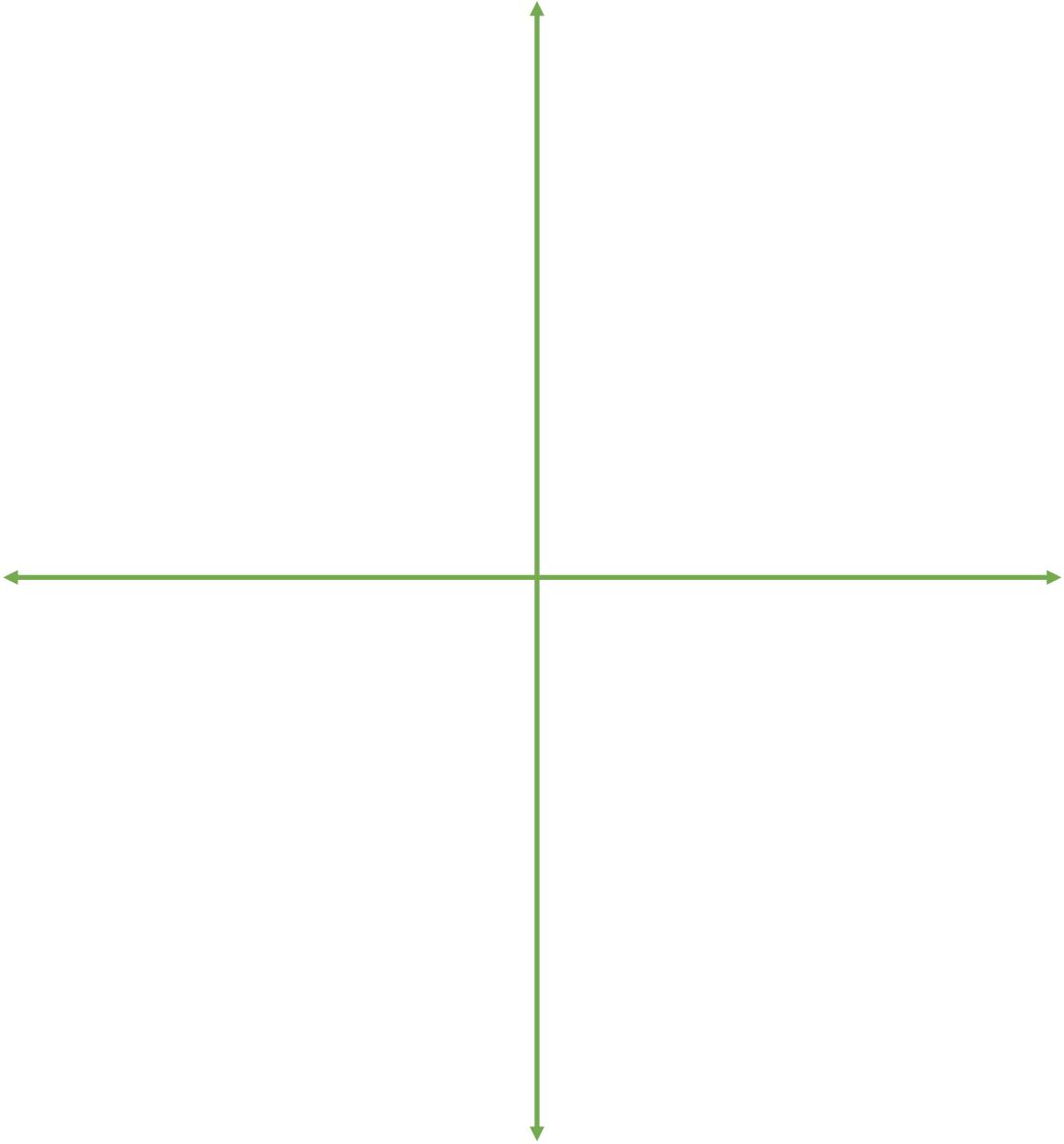
Take note of some observations here:

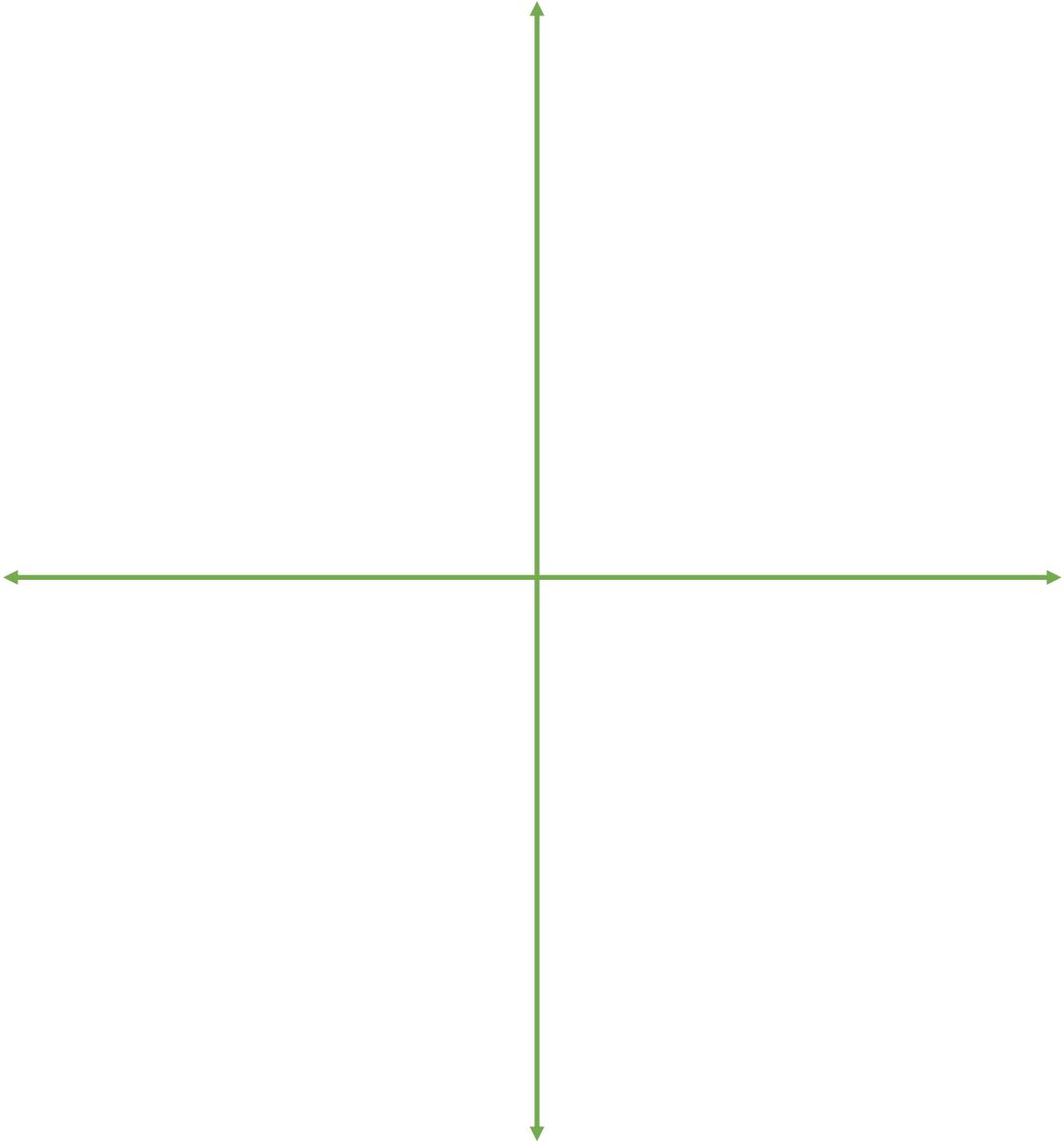
- Does the competition cluster in one particular area? Then there isn't a lot of differentiation.
- Are you in that cluster? Uh-oh – you're no different.
- Are you in a territory by yourself? Good work – then you are distinct. Now ask yourself: does my audience care about that?

- Is there an area that is vacant? That's open territory. Consider if it's worth making a move there.

Example: If the competitors all sell expensive tickets to live performances of traditionally upper-class, seemingly-inaccessible art forms (like opera or ballet), you might notice the opportunity to do things differently.







### Step 3 Onliness Statement

This exercise comes from Marty Neumeiner’s book “Zag” (2006). It will challenge your organization to take a stand for being unique. But it will only work if you’re honest with yourself about what is truly distinct. Be brave, have fun, and push yourself to think outside the box.

Here are some examples of onliness statements that describe arts organizations.

#### Art Organization A

What:	the ONLY	Historic opera house
How:	that	live-streams red sox games on the big screen
Who:	for	regular families with 4WD cars and trucks
Where:	in	Vermont
Why:	who	don’t mind pink walls and gold leaf decor
When:	in an era	of staying home because of high gas prices.

#### Art Organization B

What:	the ONLY	One-room, laid-back art gallery
How:	that	features fine art from Vermont and beyond
Who:	for	country folk
Where:	in	Orange County
Why:	who	want to see art without driving on the weekends
When:	in an era	of high-falootin’ art scenes.

And here are a couple more examples of businesses you may have heard of ...

**Harley Davidson** is the only motorcycle manufacturer that makes big, loud motorcycles for macho guys (and macho “wannabes”) mostly in the United States who want to join a gang of cowboys in an era of decreasing personal freedom.

**Hooters** is the only chain of restaurants that hires overtly sexy waitresses for young male customers in the United States who want to indulge their libidos in an era of political correctness.

Use your scrap paper and the space provided on the following pages. Apply some final polish to the wording so it flows, and capture your final onliness statement below. We’ll carry this forward as your brand positioning.

**What:**        **The ONLY**        \_\_\_\_\_  
**How:**        **that**                                \_\_\_\_\_  
**Who:**        **for**                                    \_\_\_\_\_  
**Where:**     **in**                                     \_\_\_\_\_  
**Why:**        **who**                                  \_\_\_\_\_  
**When:**     **in an era of**                        \_\_\_\_\_

**What:**        **The ONLY**        \_\_\_\_\_  
**How:**        **that**                                \_\_\_\_\_  
**Who:**        **for**                                    \_\_\_\_\_  
**Where:**     **in**                                     \_\_\_\_\_  
**Why:**        **who**                                  \_\_\_\_\_  
**When:**     **in an era of**                        \_\_\_\_\_

**What:**        **The ONLY**        \_\_\_\_\_  
**How:**        **that**                                \_\_\_\_\_  
**Who:**        **for**                                    \_\_\_\_\_  
**Where:**     **in**                                     \_\_\_\_\_  
**Why:**        **who**                                  \_\_\_\_\_  
**When:**     **in an era of**                        \_\_\_\_\_

## SMART Goals

Phew! You just finished heroic work! You completed some great thinking, and defined the foundational elements of your brand. Now let’s work on what you need to accomplish with your marketing efforts. This will be articulated in one or more **SMART goals**.

### In this section ...

Think about what you need to accomplish with your marketing efforts.

As a general rule, it’s important to align your marketing efforts with the general business goals your organization is working toward. Marketing is a crucial tool for achieving business goals at an organizational level. So, your marketing goals need to be aligned with them.

Your first step is to identify the business goals planned for the organization as a whole. These are probably outlined in your organization’s strategic plan or your mission. All your marketing efforts need to help reach those higher-level goals already outlined in those plans.

Your strategic plan, or annual plan for the year, might list goals such as these:

- Increase program revenue
- Increase profitability
- Decrease carbon footprint
- Reduce employee turnover
- Expand your product/service offering

Take a look at how each of these goals can be supported through marketing:

Examples: Business Goals		Examples: Marketing Goals
increase revenue	how →	target new audience groups
increase profitability	how →	increase audience retention
decrease carbon footprint	how →	create awareness of green initiatives
reduce employee turnover	how →	expand awareness of “Fun” brand
expand product / service offering	how →	launch pilot program

Remember, all your goals should be SMART: specific, measurable, achievable, relevant, and time-specific.

Here is an example of a not-so-SMART goal: increase underserved audience. Can you see how it leaves a lot of room for questions and interpretation? Left like this it will be impossible to know when you’ve reached the goal. Now consider this SMART rewrite: increase number of visits from schools with free and reduced lunch rates of 40% or higher to winter matinees between December 1 and February 28 in FY2017.

## Step 1 Business and Marketing Goals

What are your organizations main business goals?

1)

2)

3)

√ Specific \_\_\_\_\_ Measurable \_\_\_\_\_ Achievable \_\_\_\_\_ Relevant \_\_\_\_\_ Time-specific \_\_\_\_\_

What *marketing goals* must be set and met to achieve the goals above?

For example, should you....

- increase the number customers?
- increase incidents of use/visits?
- increase revenue/donations from existing customers?
- launch new products or services?
- expand into new markets?
- increase awareness of your organization?
- shift perceptions of your organization?

Marketing and Communications Goals:

1)

2)

3)

√ Specific \_\_\_\_\_ Measurable \_\_\_\_\_ Achievable \_\_\_\_\_ Relevant \_\_\_\_\_ Time-bound \_\_\_\_\_

## Step 2 Developing Goals

Use this checklist to make sure you're on the right path:

- Do the business goals in this plan parallel the goals outlined by the organization's leaders?
- Will the marketing goals lead directly to those business goals?
- Have you coordinated with any other internal groups that are impacted by the marketing goals?
- Are all goals SMART?
- Do you have buy-in inside your organization?
- If not, do you have a plan for getting it?
- Capture this plan below:

## Summary of Part One

Write a brief summary of what you have outlined in the previous exercises.

<b>Brand</b>	
purpose	
benefit	
positioning	
personality	
values	
<b>Goals</b>	
business	
marketing	
communications	
<b>Target Audiences</b>	
today	
tomorrow	
influencer	
other	

# Part Two

## Designing a Marketing Strategy

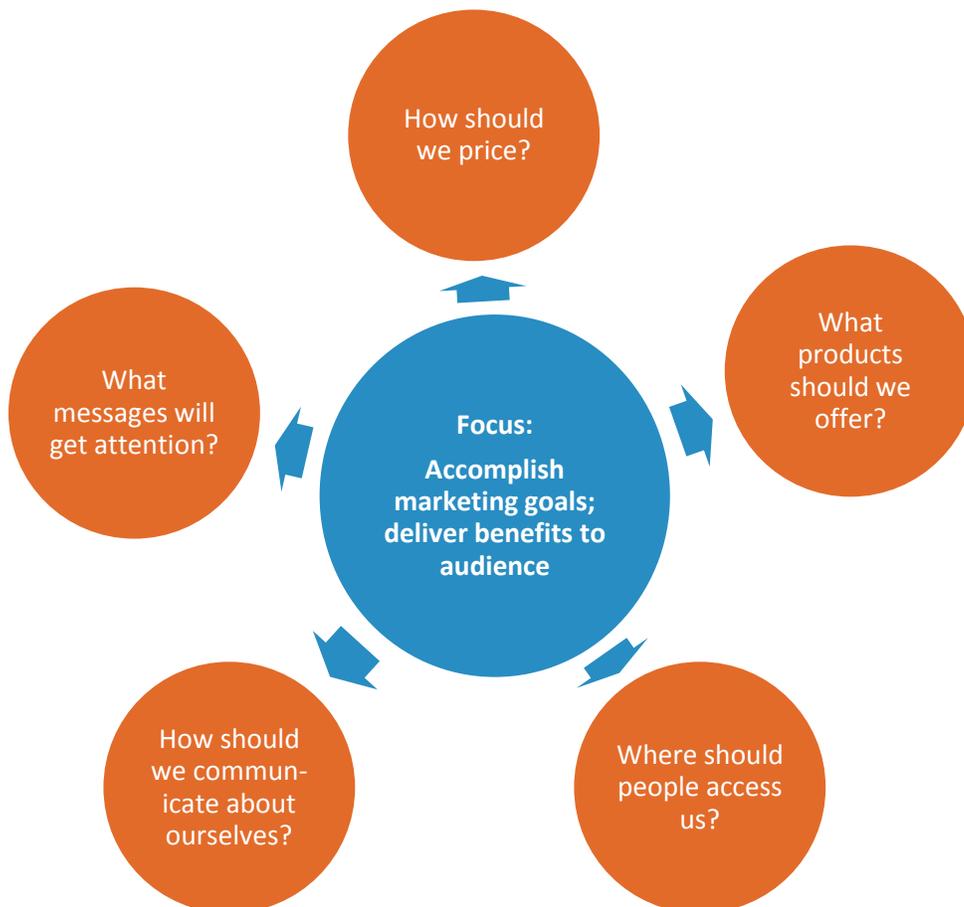
In Part One, you explored what makes your organization unique and important, who will benefit from what you offer, how they will benefit, and what goals you need to achieve.

In Part Two, your challenge is to keep all those things in mind as you develop marketing strategies. Strategies help your organization to be successful in the world – meeting your goals and benefiting your audience effectively and efficiently.

Specifically you'll be defining strategies for:

- Price**
- Product**
- Place**
- Promotion/Communication**
- Message**

Remember: All decisions are driven by the information we uncovered in Part One.



## Marketing Strategies

When most of us think of marketing, we tend to think about advertising or other communication efforts. However, the purview of marketing is much wider. Marketing is also responsible for pricing, product and service development, and distribution – or the place where the product or service will be found. Marketing plans should address all these areas, because they all need to work together for marketing efforts to be successful.

### In this section ...

Think about why you chose the marketing tactics that you do.

Have you ever been in this situation: You've been asked to promote an event or another offering though you know your audience isn't going to be interested? Or you're afraid the entry fee is more than the community will tolerate? Or you know the timing is off – perhaps something else more enticing is happening at the same time?

Most of us have been there. Taking a step back and thinking about all the marketing elements as a whole – with the goals and audience members in mind – will make your efforts more effective and efficient.

The next worksheet will prompt you to capture the following marketing strategies:

**Price:** Even if you are a nonprofit organization you have price dimensions to consider, as they help to inform the impression people have of your organization. For example, is it appropriate to make what you offer free or low-cost? That might reduce barriers to trial, reduce risk, and create a sense of ease and accessibility. But it might also create the appearance of low-value. Is a high fee appropriate? This might create the perception of exclusivity – which could be either positive or negative depending on your brand and goals. What about other costs to your audience? Are there costs in terms of time or distance, or other barriers to participation that you should consider? What about discounts? Season passes?

**Product/Service:** Do the products or services you offer fit the needs and expectations of the audience as well as they should? Are there new types of products or services that should be developed to expand your market? What about changes that could help with efficiencies or cost? Should different products or services be associated, clustered, or promoted together?

**Place:** Where and how do you make your products and services available? Is this still the smartest strategy? Are there new areas you should consider moving into – either physically or virtually – that would better suit current audiences? What about to reach new audiences?

**Promotion/Communications:** This is the beginning of what most people are anxious for – communications planning. But it's a step back from **tactics**, and an opportunity to think of your communications as a whole. What is the smartest overall strategy for promoting what you have to offer? There are so many options. Should you focus on connecting with people during specific times, or in certain places? Should you partner with other groups, or leverage your association with other groups? Should you be where people expect to hear from you, or

where they least expect it? Should you go only new media, traditional media, or a blend? Should you speak as an authority, or adopt the voice of your audience? Should you promote yourself along with a cause? Incent referrals? Focus on word-of-mouth? Returning customers? What about events, or giveaways? Only you will know the right strategy or strategies, because it will be based on your situation, products, budgets, audience, brand, and desired goals.

### **Message**

Now is the time to get organized about what messages you should use with your target audience to have the greatest effect. These messages will be inspired and prioritized based on the work you've already done to explore the brand's purpose, benefit, and positioning.

## **Step 1** What are your Marketing Strategies?

The following exercise asks you to think about why you do what you do. It also asks you to imagine an alternative. Then, ask yourself, “is the alternative better than our current practices, or not?” Can you call your current practices a **strategy**? Or do you need to craft a **strategy** based on what you discovered in Part One?

### **Pricing Strategy**

How do you determine the price of your offerings?

Why is this your current practice? How is this clever? How does it fall short?

Would you recommend a different strategy? What is it?

Why do you recommend it over the current pricing strategy?

### **Product/Service Strategy**

How do you decide which products/services to offer?

Why is this your current practice? How is this clever? How does it fall short?

Would you recommend a different strategy? What is it?

Why do you recommend it over the current product / service strategy?

### **Place Strategy**

Write a brief description of your general practices when it comes to distribution (the place where you offer your products/services).

Why is this your current practice? How is this clever? How does it fall short?

Would you recommend a different strategy? What is it?

Why do you recommend it over the current distribution strategy?

### **Promotion/Communications Strategy**

Write a brief description of your general practices when it comes to promotion.

Why is this your current practice? How is this clever? How does it fall short?

Would you recommend a different strategy? What is it?

Why do you recommend it over the current promotion strategy?

## Step 2 What is your Message Strategy?

Your purpose, benefit, and positioning are important tools for making meaningful connections with your audience. They help describe why and how your organization is unique and worthwhile.

You will want to communicate this worthiness to the audience in some form. Use the purpose, benefit, and positioning as a springboard for outlining the priority messages you will build into your communications **tactics**. Remember: avoid using internal jargon. Instead, craft messages that will speak to the audience. Keep the personas in mind.

**Purpose**  
(Take this from the  
summary on page 44)

Message – priority one:

**Benefit**  
(Take this from the  
summary on page 44)

Message – priority two:

**Positioning**  
(Take this from the  
summary on page 44)

Message – priority three:

### **Step 3** Establishing Market Strategies

Use this checklist to make sure you're on the right path:

- Do your strategies take advantage of all the thinking you've done so far?
- Are the words simple and clear enough to avoid debate and multiple interpretations?
- Are they clever?
- Are they achievable?
- Are they relevant to your audience groups?
- Do you have buy-in inside your organization?
- If not, do you have a plan for getting it?
- Capture this plan below:

## Communications Tactics

Finally! We get to talk about **tactics**. All the work you've done so far will inform your new tactics. Be sure to incorporate that work and knowledge into these next steps. When people think of tactics, they often don't take the time to connect the tactic to their goals or strategies. Does this sound familiar?

### In this section ...

Think about what marketing tactics you will use. How will you reach out to your different audiences?

“What we really need to do is ...

- Make a webpage!
- Create a Facebook page!
- Put a notice in the newspaper!
- Hang up posters!”

While all these things are examples of tactics, make sure that your tactics reflect the work you've done thus far. Good tactics will not be one-stop solutions – they will create a lasting relationship: grab a customer's attention, welcome them, and bring them into your community.

The key to effective communication with your audience is to plan for an ongoing relationship with them. Don't think about delivering a message once; plan to connect with them again and again. Invite them on a journey, then escort them through that journey every step of the way.

First, you'll need to get their attention. Then you'll introduce yourself. Next, tell them things about you to pique their interest. Then ask them to spend some time with you. And then – always – politely ask for contact information and permission to be in touch. Last but not least, have a good reason to reconnect.

It's your job to keep each of those steps in mind, and continuously employ communications tactics to help people into deeper relationship with your organization. Here are five stages that will help you do this.

**Gain awareness:** introduce people to you and what you offer

**Build interest:** provide deeper information, making sure you refer to your benefits

**Create desire:** as people weigh their options, continue to show how you are relevant, and offer the features and facts that will make decision-making easy

**Inspire action:** make it easy to accept, buy-in, show up, or take any other action

**Continue conversation:** after all that effort, make sure you are poised and ready to keep the relationship going – re-energizing an existing customer is much more efficient than creating a new one

**Step 1** What are the SMART tactics?

For each of the audiences you have named in Part One, insert tactics into the table below.

	Gain attention	Build interest	Create desire	Inspire action	Continue conversation
<b>today</b>					
<b>tomorrow</b>					
<b>influencer</b>					
<b>other</b>					

## Measurement and Optimization

You've built a smart marketing plan. Now, how are you going to know your efforts are successful?

### In this section ...

Think about how you'll know your marketing efforts are successful.

You started by defining your desired marketing goals, and made sure they are measurable. That's a place to start. But often those goals can only be measured once the entire effort is complete. So it's important to think about what success looks like for each marketing tactic, and how it will be measured.

Given a big enough budget and a long enough timeframe, most every effort can be modeled, metrics developed, and impacts measured fairly precisely. Don't worry – we don't expect that of you here. Just take a minute to consider: how will you know that a specific tactic is doing its job? There will be a space to note these metrics in the final marketing plan.

**Putting it All Together:**

## **Your Two-Page Marketing Plan**

Use this template to consolidate the outcomes of all exercise steps.

<b>Brand</b>	
purpose	
benefit	
positioning	
personality	
values	
<b>Goals</b>	
business	
marketing	
communications	
<b>Target Audiences</b>	
today	
tomorrow	
influencer	
other	
<b>Marketing Strategies</b>	
price	
product	
place/distribution	
promotion/ communications	
Message	

Tactics Set 1	Description	Measurement	Budget	Timing
gain attention				
Tactics Set 2	Description	Measurement	Budget	Timing
build interest				
Tactics Set 3	Description	Measurement	Budget	Timing
create desire				
Tactics Set 4	Description	Measurement	Budget	Timing
inspire action				
Tactics Set 5	Description	Measurement	Budget	Timing
continue conversation				

# Notes and Reflections

A holding place for lessons, reflections, or thoughts on this process and plan.



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This guide is a tool for the Agile Nonprofit, a program of the Vermont Arts Council. This guide was created in collaboration with Cheryl Eaton, Wild Genius. 2017.