# Marketing plan - Your organisation name [logo]

## Use this template to help you create a marketing plan for your organisation.

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## Your goals

Explanation:

Write a short description about what you aim to achieve with this marketing plan. Your goals should be SMART - specific (x% more supporters, x new beneficiaries, x website visitors), measurable, attainable, relevant and time-bound. Revisit these goals at regular intervals to assess how your objectives are being met; it's likely that you will need to keep fine-tuning your marketing plan as you learn more about what works.

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Section 1: Understand your market

It's vital to know who benefits from the work of your charity, who might support you financially or in other ways, and who your potential partners and competitors are. If there are gaps in your knowledge, it may be worth spending some time and potentially resource on market research. Having accurate data is the cornerstone of every marketing plan.

**1. Who are your beneficiaries?**

Describe who currently benefits from your organisation’s work and create a snapshot of their main characteristics – this could include their age, their lifestyle, their needs or their location. If you ‘sell’ to other organisations, it could include their job title and area of responsibility. How you market to them will depend on their profile so gather as much information about them as you can; think about the best way to reach out to them and the messages they might respond to. Once you know more about your beneficiaries, you should be able to segment them into groups so that you can target them with specific messages and offers. Bear in mind you might have multiple groups.

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**2. How do your beneficiaries behave?**

Unless you are starting up, you will already have valuable information about your beneficiaries’ and stakeholders’ behaviour. How often do they come into contact with you, what do they need when they do and how does that help them ? How do they interact with your organisation? By studying the data you should be able to identify which customer segments have the greatest potential for growth. These are the groups you should target with your marketing activity. Rank your prospects from cold to warm. Those that already know and like your organisation (your hottest prospects) will respond to more personal marketing approaches such as permission-based email and events.

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**3. Who are your competitors?**

List your key competitors. Your rivals might include local organisations, charities, social enterprises, local authorities and other experts in your field or even corporate competitors. Against each competitor, explain why your customers or potential customers might choose their product/service over yours.

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**4. What's special about you?**

Explanation:

Now focus on why customers are most likely to choose your organisation. List your unique selling points (USPs) and describe the brand values that underpin everything you do. What is your main selling point – value for money, quality, service, convenience, expertise, specialist support?

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## Section 2: Identify marketing opportunities using SWOT analysis

SWOT, which stands for strengths, weaknesses, opportunities and threats, is a technique to help you analyse your internal and external environment in which your organisation operates.

**1. What are your strengths?**

Identify the key ways in which you stand out from your competitors. Your strengths can be used to create compelling marketing messages. This could include anything from the range of services you offer or your staff expertise to the measurable impact you have on peoples lives.

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**2. What could you improve on?**

Are there any aspects of your product/service that could be improved? Have you had any negative feedback on your programmes or the outcomes you achieve? How are your employees performing? Other internal weaknesses could include a lack of time, money, resources or expertise. You'll need to address your weaknesses before you embark on a marketing campaign.

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**3. What opportunities are out there?**

Identify the important trends in your area of work or expertise that could open up new opportunities. Are there any gaps that your product/service could fill? Are there any additional uses for your product/service that you could exploit? Are there new markets that you could expand into or new territories that you could explore?

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**4. What threats are you facing?**

Think about the obstacles that could be holding you back. External threats can include changing customer behaviour or new charities in your field or local area, changes in the economy, global pandemics and political changes. Some might be beyond your control but its important to acknowledge them.

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## Section 3: Assess potential marketing channels

Communications relies on getting the right message to the right audience through the most appropriate channels. Develop an understanding of what channels (website, social media, newsletter) are available, so you can identify the best way(s) to communicate with your audience(s).

**1. Review your options**

There are many ways to market your organisation to your beneficiaries, supporters and stakeholders. Some are absolutely essential; others may not be appropriate for you and your target market. Use this list to make an initial assessment of the options open to you.

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| --- | --- | --- | --- | --- |
| **Marketing channel** | **Questions to ask** | **Advantages** | **Measurement** | **Cost** |
| Email | Have you got a good quality email list with permission to get in touch? Do you have a GDPR Policy and procedures in place? | Easy to target messages at segments; great for keeping in regular contact until customers are ready to buy | Email analytics can tell you everything you need to know about who has clicked on what. | Very low cost but doing it well takes time |
| Online marketing | Are you attracting enough people to your website? | SEO and pay-per-click advertising can help get your organisation to the top of search results | Google Analytics can help you measure the success of SEO and pay-per-click activity | The cost depends on how much outside expertise you need to bring in |
| Social media | Which social media sites are your beneficiaries and supporters using? | Social media helps you build relationships with customers and widen your reach | Everything is measured from followers to likes; use links and calls to action to drive traffic to your website. | Social media sites are in the main free but you have to factor in the cost of your time. Some have paid for advertising such as Facebook which can be very targeted but you will need a budget |
| Content marketing | Are you promoting your expertise? | Writing guides, blogs and case studies can help you build a strong reputation in your field | Include links in your content and measure traffic to your website; ask customers for feedback | Creating content takes time |
| PR | Do you need to raise your profile? | PR can give you exposure – whether you are looking for mentions in the organisation press or a local paper | Measure uplifts in sales or website traffic when you have had media coverage | Perseverance is the name of the game with PR so it can take time, and it sometimes pays to bring in an expert to do specific pieces of work if you are low on capacity |
| Exhibitions and events | Can you reach your customers in one place? | An opportunity for face-to-face contact with lots of motivated prospects | Collect data on everyone you meet, follow up on every lead and measure the results | Events are very costly but they offer big rewards. Make sure you have the capacity and the whole team and/or volunteers can help |
| Advertising | Will it be seen by the right people? | Advertising in the press, directories or online can help you reach your target market | Monitor results from ads using dedicated email addresses, URLs and phone numbers | Costs vary – but local television or radio advertising can be affordable |
| Direct mail and leafleting | Could letters and flyers get your organisation noticed? | Direct mail and flyers are making a comeback | Monitor results from flyers using dedicated PO Box numbers, email and web addresses and phone numbers | Potentially very cost-effective – but think about who you are trying to reach. Do they have communication barriers, do you need to create Easy Read? |
| Sponsorship | Can you improve your reputation by association? | Local firms can get great goodwill by sponsoring local charities or sports teams | Measurement is not easy but you can monitor overall results over the course of the sponsorship | Local sponsorship can be quid pro quo – such as paying for team kit in return for a logo – this can work well with transport if you have a minibus etc. |
| Your Network | Have you mapped all of your allies in the sector that can help you? | Ally charities or network contacts are generally happy with amplifying your messaging if you prep them first | As this is likely to be through social media, you can monitor through your social media channels | It may take a little time to develop a pack that will help contacts to put the message out – such as pre-writing tweets. |

**2. Match the marketing method to your target market**

Now look at these marketing channels from the point of view of your beneficiaries and supporters. Consider how they like to be communicated to rather than how you want to communicate to them! You may need to step out of your comfort zone. Which of communications channels are most likely to be used by your audience and which are they most likely to engage with?

Personas are an important part of developing a marketing plan as they allow you to get a better understanding of your audience groups. For example, if you are looking to increase the number of major donors for your charity, you should start by looking at your existing supporters. You might discover they share similar characteristics like similar age range or postcodes, employment status, etc.

Once you have developed a persona for your target audience(s), you can identify their preferred communication channel(s). For example while older audiences may be more likely to engage with a postal mailing, younger audiences are more likely to use social media.

Create a shortlist of 4-5 marketing methods to focus on. If you are looking at social media, choose just two or three social media sites to start with; you can test them out and add more as you learn what works for your organisation.

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## Section 4: Prepare the ground

## Now that you’ve developed a rough structure for you communications, based on evidence from your market and SWOT analyses, you can begin to pull together the resources that will allow you to deliver your communications plan.

**1. Set a budget**

How much you spend on marketing is entirely up to you. There are always marketing opportunities no matter how small a budget; the key is to agree how much you want to spend first and then make it go as far as possible. You can increase your budget once you know which marketing techniques are having the biggest impact. Don’t forget that your time costs money – many marketing tools such as email and social media can take up a lot of time even if they don’t have significant costs. If you need to seek funding before you begin, plan this into your timelines.

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**2. Create your marketing toolkit**

Create the collateral to make it easy to roll out your marketing action plan in a clear and consistent way. This should include: slogans and calls to action; images and videos; "about us" wording for social media sites and press releases. Everything should be in keeping with your vision and brand values.

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**3. Get ready for the response**

Effective marketing will lead to an increase in engagement, so before launching your new communications, be sure you have taken all the steps you need to cope with engagement – otherwise you risk disappointing new beneficiaries and frustrating supporters. Make sure your website is up to date and has all the necessary landing pages to handle specific traffic. Work with staff to make sure they understand the objectives of the campaign and can deal with enquiries efficiently and in keeping with your brand values.

You need to create targets so that you can plan for the results of your marketing efforts; as you develop your strategy you'll be able to predict future changes more accurately. List all the things you need to do to prepare for the impact of increased marketing here.

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**4. Integrate your marketing**

Ensure that all your marketing activity works together. Add social media buttons to your website; add links to online content and web landing pages on your social media sites and in your emails; prompt people to sign up to your email newsletter on your homepage. Make a list of all the ways you can connect your marketing channels here.

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**5. Agree who's doing what and by when**

Establish roles and areas of responsibility with your team and specify deadlines. Also agree dates when you are going to review the activity. List key areas of responsibility here.

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**Section 5: Create your marketing action plan**

Now use the table below to summarise your plans.

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| --- | --- | --- | --- | --- |
| **Activity** | **Timing** | **Target audience** | **Objectives** | **Cost & time** |
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## Section 6: Review your plan

Schedule review dates so that you can measure the success of everything you do. Marketing is a learning process – use these reviews to continually fine-tune your marketing strategy.

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| **Activity** | **1st review date** | **Measure of success at 1st review** | **2nd review date** | **Measure of success at 2nd review** | **End date** | **Measure of success at end date** |
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