

NONPROFIT marketing plan template

Do a happy dance!
You just took your
first step towards
marketing with purpose!



Monica Pitts

SUCCESS PATH TO nonprofit marketing with purpose

a.k.a. less stressful more successful marketing

- 1 realize it's not working
- 2 **make a plan**
- 3 follow your plan
- 4 review & tweak
- 5 market with purpose

My 2021 goal is to make marketing less stressful and more successful for 1,000 nonprofits this year.

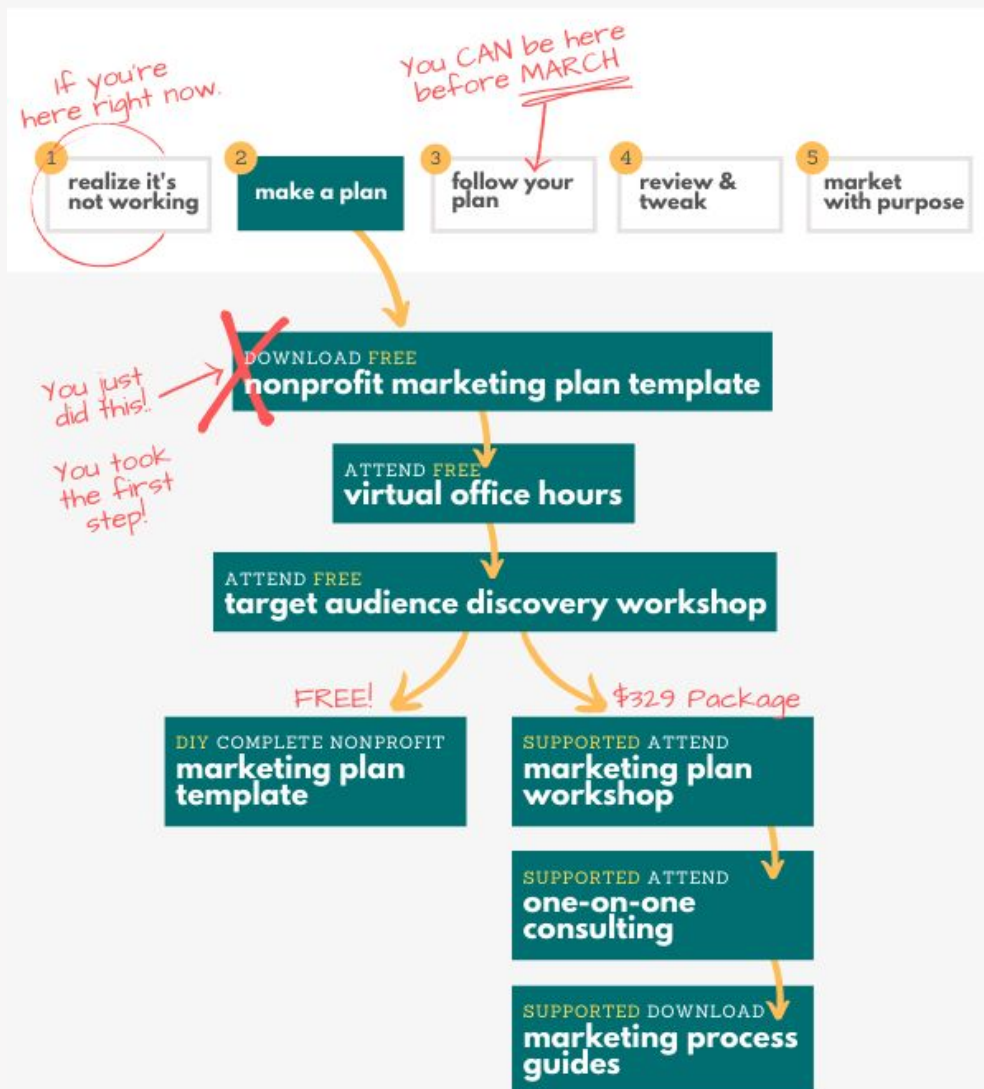
would you like to be one of them?

I'll be your guide to embrace this new way of marketing. To market on purpose with purpose and handle whatever 2021 brings.

Here's how you can start marketing with purpose before March.

SUCCESS PATH TO nonprofit marketing with purpose

a.k.a. less stressful more successful marketing



Introduction to Marketing Plans

There are so many parts to a marketing plan, it's easy to get them all tangled up. It's hard to wrap your mind around all of them and make sure you've done enough, covered everything, and/or not done too much.

Big picture: I think of a marketing plan as a flowchart (flip to the [next page](#) for a chart example). It starts big at the top with Why, and Who and then breaks into smaller, supplemental parts with What & Where, When, How, Budget and Outcomes. After going through all those pieces and documenting each part, it's probably not realistic to house your entire marketing plan in a flowchart.

When we plan a client's marketing, we use a series of documents, processes and calendars to keep the information organized and complete each activity on time. I wish it could all be in a simple flow chart, but little boxes with one word on each line doesn't really seem all that functional. I do find that the flow chart image serves as a good guide for people (including myself) to connect with what they're trying to produce.

Whether you start in a flowchart or build it out in separate documents, all marketing plans need to have at least these seven things:

1. **Why** – Your goal defining what you hope to achieve from your marketing activities.
2. **Who** – This has two parts:
Part 1 details your target audience, explaining who you plan on reaching with your marketing.
Part 2 outlines your brand message, who you are and how you represent yourself in all of your marketing activities.
3. **What & Where** – These are the activities you plan to do and where you will do them.
4. **When** – The deadlines for each activity.
5. **How** – Each activity will have two 'Hows': the deliverables – what you need to do the activity and the creative – and the ideas to make the deliverables connect with your audience.
6. **Budget** – The time and money to complete each activity in your plan.
7. **Analysis** – How often you'll review your outcomes, the metrics you'll review and other indicators of a successful plan.

You can do this!

STICK WITH ME!
Before you stall out
or get overwhelmed
stop by my virtual
office.

Virtual Open Office

Thursdays from 12 - 1 CST

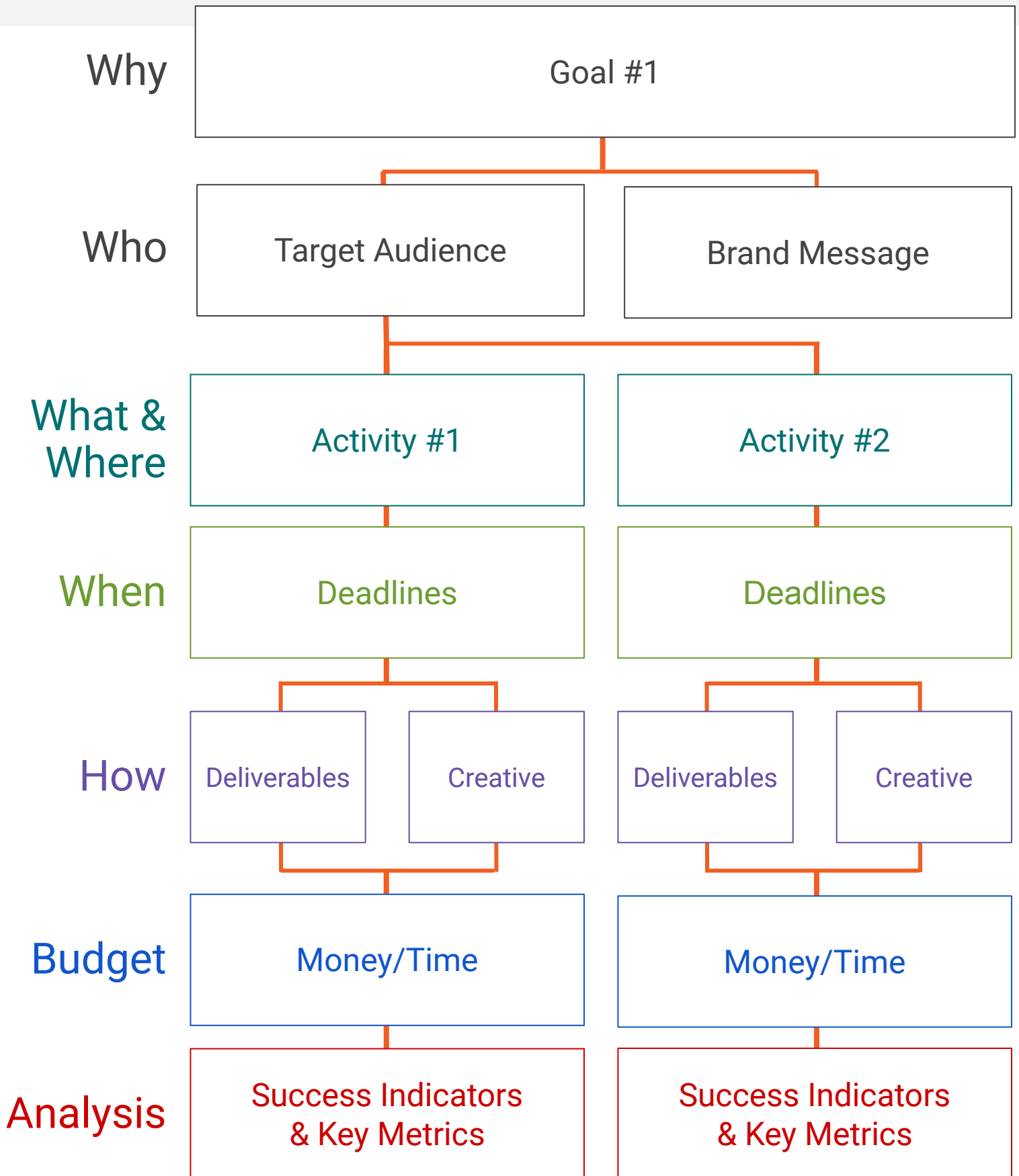
Jump in a 20 min online meeting with me and 3 other nonprofits who are doing the exact same thing you are – planning their marketing to handle whatever 2021 brings.

Usually I charge \$100 an hour for private consulting but through the end of February these group office hours are free. My gift to help you take that next step towards easier and more successful marketing or as I like to call it “marketing with purpose”.

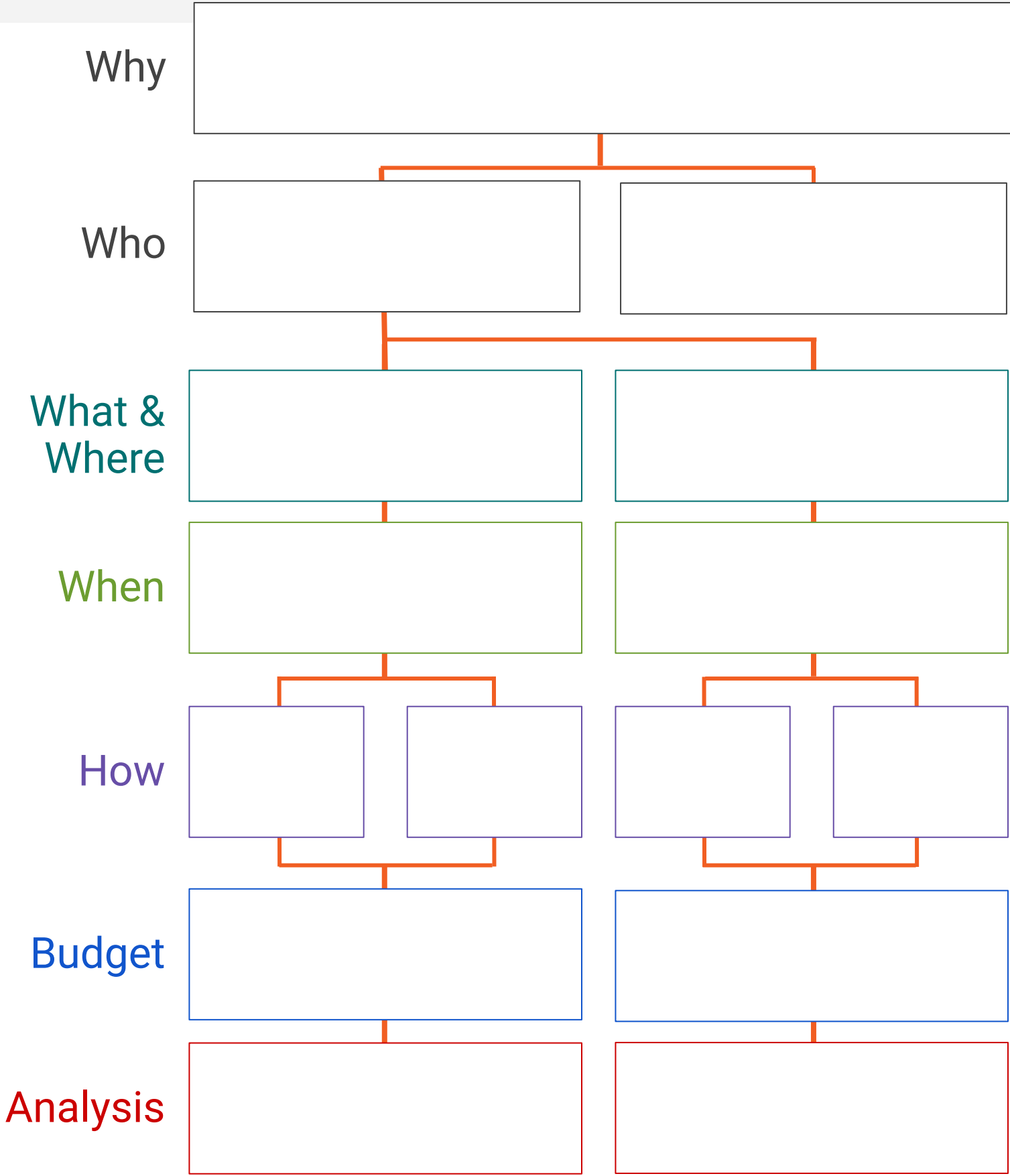
[Please RSVP for a 20 min time slot](#) so I can keep the groups manageable and the conversation flowing. Repeat joiners are welcome!

[RSVP for Office Hours](#)

Marketing Plan Flow Chart



Marketing Plan Flow Chart Template



why

The why behind creating your marketing plan is your goals.

Why are you considering doing a particular activity or set of activities?

What do you want the long-term effects of those activities to be?

Your goal should be specific, and you may need more than one. For example, if through you plan to intend to connect with donors AND volunteers, you may have a goal for each.

Pro Tip 💪

Your goals in this section don't necessarily need to be full on **SMART goals**, because you'll talk about the time frame and how you'll measure them in other parts of your plan.

Why

Nearly everyone has the goal of growing their organization. You may also have more specific goals to generate new or return donors or volunteers. Because those goals may require different activities to accomplish, you'll want to separate them.

While both of them would feed the big goal of growing your organization, I would still divide them out because you'll have different activities to reach different audiences to achieve those goals.

Less is More

I want to caution you from setting too many goals in any given year. I suggest choosing between 1-3 to focus on each year. You're marketing to create a cultural shift between you and your audience. Building that shift takes time. Creating the processes you'll need to make that shift also take time. Most organizations run with a limited number of staff members. You want a goal you can actually achieve this year using the assets you have or are building.

For example, most of our new clients are for web design (on purpose — I want to figure out if people are crazy before I commit to marketing their organization for them month after month 😊), and my existing clients often turn into online advertising clients. Our marketing to achieve the goal of selling websites to new people requires different marketing activities than those we would use to sell online advertising to our existing clients. Some activities overlap while others are entirely designed to support one goal versus the other. So our plan has two big goals at the "top."

What is your goal?

What does success look like to you?

who

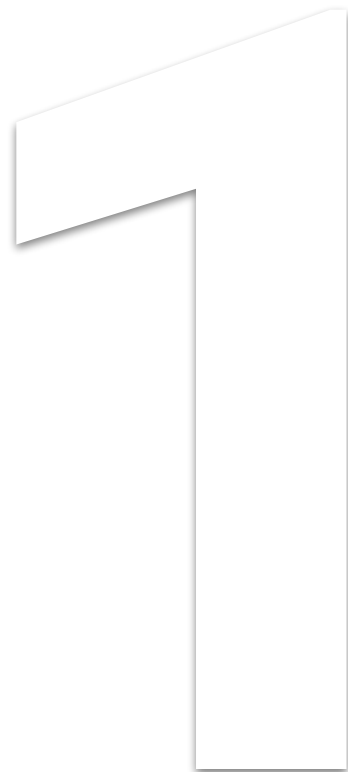
Two Parts: Your Target Audience & Your Brand Message

Part 1: Your Target Audience

Knowing your target audience is the first step to effectively communicating and marketing with them.

Discovering your target audience helps you:

- Understand why donors donate and volunteers get involved.
- Know what to say when asking for donations or calling for volunteers.
- Know what to write about in your communications to build awareness with new supporters and deepen relationships with current donors.
- Identify an ideal donor, board member or volunteer immediately upon meeting them.



The success of your all marketing activities depends on how well you know your audience.

PODCAST/BLOG POST

[Do you really know your donors?](#)

EBOOK

[Generational Marketing](#)

PODCAST/BLOG POST

[Handling social media for multiple audiences](#)

Who Part 1: Target Audience



WHO DO YOU WANT TO WORK WITH?

1

DEMOGRAPHICS

ROLE:

COMPANY DESCRIPTION:

HOBBIES, INTERESTS, ETC:

GENDER:

AGE:

INCOME/HOUSEHOLD INCOME:

STAGE OF LIFE:

WHAT DO THEY CARE ABOUT?

WHAT ARE THEIR INTERESTS, ATTITUDES AND OPINIONS?

HOW MUCH DO THEY KNOW ABOUT YOUR MISSION AND IT'S IMPORTANCE?

MANNERISMS:

COMMON THINGS YOU HEAR HIM OR HER SAY ABOUT YOUR PRODUCT OR SERVICE:

COMMON THINGS YOU HEAR HIM OR HER SAY ABOUT THEIR LIFE/ROLE OR COMPANY:

2

IDENTIFIERS

Who Part 1: Target Audience

3

WIIFM

WHAT'S
IN IT
FOR
ME?

CHALLENGES FACED PROFESSIONALLY OR PERSONALLY YOU MAY BE ABLE TO RELATE TO OR SOLVE:

WHAT PROBLEMS DO YOU SOLVE FOR THEM OR THE PEOPLE THEY CARE ABOUT?

WHAT INTERESTS DOES HE OR SHE HAVE IN COMMON WITH YOUR ORGANIZATION?

WHAT CORE VALUES DOES HE OR SHE HAVE IN COMMON WITH YOUR ORGANIZATION?

(If you're not sure check out the core values activity on page 13.)

WHY DO THEY DONATE OR VOLUNTEER WITH YOUR ORGANIZATION?

4

COMMON
OBJECTIONS

WHAT ARE HIS OR HER COMMON OBJECTIONS TO DONATING OR GETTING INVOLVED?

WHAT DOES HE OR SHE NEED TO MAKE A DECISION TO DONATE OR GET INVOLVED?

Pro Tip

Create a [buyer persona](#) for each audience separately. This allows you to see where audiences overlap and how they differ. Buyer personas also outline creative ideas for later and define what activities will best connect with your audience.

FREE Workshop

Grab a marketing buddy and walk through this activity with me and a group of fellow nonprofits!

Target Audience Discovery

Workshops

Tuesday Feb. 9 @ 9 am

Wednesday Feb. 10 @ noon

Saturday Feb. 12 @ 11 am

This is a free 1.5 hr interactive virtual workshop - not just a presentation. Together we'll explore and document who you need to communicate with to successfully build awareness for your organization and deepen relationships with your supporters.

[Register Now!](#)



who

Two Parts: Your Target Audience & Your Brand Message

Part 2: Your Brand Message

The second part of “Who” is you – the story you want to tell with your brand message. Who are you? How do you talk about yourself? What are the rules?

When you’re in an organization with lots of moving parts it’s hard to keep the story straight. Volunteers say one thing, staff says another leaving the public confused about your mission and initiatives.

To keep it all straight include your identity guidelines. Outline your brand colors, fonts and logo usage. If they’re already documented, just add a clearly labeled link in your plan.

Then take it a step further and give all the people working on your plan clear rules of engagement and a unified vocabulary.

Pro Tip 💪

A consistent brand message is essential to build trust with your audience.



Who Part 2: Brand Message

Why do you do what you do?

What values will you portray? (If you're not sure check out the core values activity on page 13.)

How do you do what you do? And why is that the best way?

How is your mission essential to those you serve and/or your community?

Who Part 2: Brand Vocabulary

Define Your Brand Vocabulary

What do you call your programs or services?

What do you call the people who work or volunteer for you?

Frequently used phrases/words?

What do you call the people you serve?

What words/topics are off limits?

Core Values

Define your values.

You want your tonality to reflect those values so people can be drawn to who you are. You want to work with people who value the same things as you.

Select every word that appeals to you. Then highlight the best 5-10.

There's not a hard and fast rule of just having 5 or 10 core values, the goal is to get specific and select ones you truly connect with.

Next, for each word complete the following statement three times:

[core value] is important to me because _____.

You'll often cite the most superficial reasons first. So after completing the statement 3 times you'll be much closer to the real reason you find the value meaningful.

- Faith
- Money
- Self-reliance
- Accomplishment
- Fame
- Non-violence
- Seriousness
- Accountability
- Family
- Nurturing
- Service
- Accuracy
- Fate
- Openness
- Sexuality
- Achievement
- Fitness
- Opportunity
- Simplicity
- Adventure
- Flair
- Optimism
- Sincerity
- Aspiration
- Force
- Patriotism
- Skill
- Attitude
- Freedom
- Peace
- Solidarity
- Authenticity
- Free will
- Perfection
- Speed
- Authority
- Fun
- Performance
- Spirit-in-life
- Autonomy
- Generosity
- Persistence
- Stability
- Beauty
- Giving/charity
- Personal growth
- Fairness
- Mobility
- Challenge
- Global view
- Philosophy
- Status
- Change
- Goodness
- Pioneer spirit
- Strength
- Chastity/Purity
- Gratitude
- Pleasure
- Style
- Cleanliness
- Hard work
- Popularity
- Success
- Collaboration
- Harmony
- Positive attitude
- Support
- Commitment
- Heroism
- Power
- Systemization
- Communication
- Heritage
- Practicality
- Teamwork
- Community
- Honesty
- Preservation
- Tolerance
- Competence
- Honor
- Prestige
- Tradition
- Competition
- Hope
- Pride
- Tranquility
- Concern
- Humor
- Privacy
- Trust
- Conformity
- Inclusiveness
- Love-romance
- Risk-taking
- Prosperity/wealth
- Truth
- Courage
- Influence
- Punctuality
- Utility
- Conviction
- Inner peace
- Purity
- Variety
- Cooperation
- Innovation
- Quality
- Well-being
- Creativity
- Improvement
- Rationality
- Wellness
- Customer
- Integrity
- Recognition
- Wisdom
- Decisiveness
- Intuition
- Regularity
- Democracy
- Involvement
- Rehabilitation
- Determination
- Joy
- Reliability
- Discipline
- Justice
- Resourcefulness
- Discovery
- Knowledge
- Respect
- Diversity
- Leadership
- Responsibility
- Duty
- Learning
- Responsiveness
- Education
- Leisure
- Results-oriented
- Efficiency
- Equality

- Standardization
- Accessibility
- Empowerment
- Rootedness
- Concern
- Rule of law
- Excellence
- Loyalty
- Safety
- Experience
- Meaning
- Satisfying others
- Expression
- Merit
- Security
- Selfishness

Who Part 2: Brand Tonality

Think about the personality you want to portray through your marketing. What does it feel like? The tone you choose will impact the perception audience members have of your brand or organization. The perfect brand tonality is one that supports the values and personality of your organization and can also connect with your target audience. Maintaining a consistent brand tonality throughout all your marketing content not only builds your brand, it builds trust with your audience.



Direct

A direct tone may seem like a safe route to take because it's described as professional, conservative and traditional. But the tonality can convey emotion too. When a direct tone is used to deliver powerful, clear messages it creates a sense of trust and reliability. The U.S. Army is known for forming their messages with a courageous and brave tone that leaves others feeling motivated and empowered. Be careful though, an overly direct tone can come off as cold or rude.

- Conservative
- Clinical
- Traditional
- Professional
- Resonate
- Powerful
- Distinct
- Brave
- Courageous
- Heavy
- Steady



Friendly

Friendly tones evoke warm and calming emotions, making them a good choice for brands that are family oriented and dedicated to showing kindness and care to its customers. These tones are often associated with producing the "aww" factor. Google often uses this tonality in their messaging. For example, in one commercial, a dad types emails to his daughter as she grows up, compiling memories for her to see when she is older. Coke-a-Cola generally uses this tone as well.

- Agreeable
- Fair
- Friendly
- Pleasant
- Helpful
- Tender
- Kind
- Quaint
- Innocent
- Warm
- Calm
- Easy going
- Gentle
- Laid back
- Neutral

Who Part 2: Brand Tonality



- Lively
- Light
- Charming
- Curious
- Thoughtful
- Cheerful
- Witty
- Comfortable
- Open
- Encouraging
- Energetic
- Enthusiastic

Energetic

Infomercials and advertising targeted towards kids tend to adopt an energetic tone by default. This YAY! tonality conveys enthusiasm, and optimism and often happiness. Companies that want to make their readers feel excited and lively could benefit from using this tone. For example, a company promoting a certain diet regimen may choose to use an energetic tone to portray dieting as a fun and rewarding process as opposed to a terrible, I can't eat chocolate and ice cream process.



- Trendy
- Youthful
- Clever
- Alive
- Outrageous
- Bold
- Unusual
- Wild
- Funny
- Different
- Noisy
- Edgy

Trendy & Bold

If friendly tones have the “aww” factor and energetic tones have the “YAY!” factor, then trendy and bold tones definitely portray the “huh?” factor. Think Skittles and super bowl commercials. These types of tones are more common in the marketing and advertising we see today. It's all about being a little bit wild and weird and leaving people wondering if what they just saw actually happened. At the same time, cleverness plays a big part in defining this tone because it makes a brand memorable.

You don't have to pick just one!

Your organization's tonality isn't limited to these four examples. You can mix and match and make your own. Take [Duluth Trading Co.](#) for example, their animated commercials talking about wedgies fit right in the Trendy & Bold tonality. While their product descriptions and website titles are a mix of Bold and Direct tones that make you feel like they were written by a direct and witty friend.

[Fisher-Price](#) changes tone based on their audience. For kids they take an energetic tone, when they talk to adults they use a nostalgic friendly tone with a twist of bold to catch your attention.

Who Part 2: Brand Guidelines

Brand Colors

Show examples of your brand colors.

Provide color swatches as well as formal names for Hexadecimal (web), CMYK (print) and if you use them, Pantone (print).

Outline color usage expectations.

- Explain which are primary colors.
- Show secondary or accent colors.
- Document any neutral colors that are acceptable to use in conjunction with your brand.
- Consider any colors used for specific design elements such as:
 - Backgrounds
 - Buttons
 - Links
 - Headings
 - Body copy

Brand Fonts

Document approved brand fonts for web and print.

Provide examples of each font and describe any usage restrictions.

Consider...

- How titles may be styled throughout your website and printed marketing materials.
- Any font treatments, like bold or italic, that may be off limits.
- An alternate font to use for numbers if your main font doesn't display them well.
- Which fonts might be used for certain sizes of copy.

Logo Usage

Show an example of each approved logo variation.

- Share specific sizing instructions for each logo variation.
- Include the measurements for the logo and spacing relative to elements around the logo.
- Outline both acceptable and unacceptable logo placement.
- Document how the logo should be placed on backgrounds including solid colors, patterns or images.

Questions to Consider

- Can your logo be modified in anyway?
- Can the size of the text or icon be modified?
- Can an alternate font be used?
- May the colors be edited?
- Is it okay to use just the icon alone, or does it always need to be accompanied by the company name?
- How do you incorporate a tagline with your logo?
- Can the logo be used as a watermark?
- Can the logo be used as a repeating background?
- Is it okay to place your logo over an image?

Who Part 2: Brand Guidelines

Name Usage Policy

Explain how to use your name.

- Document acceptable nicknames, abbreviations, and capitalization guidelines.
- Determine if you always include LLC or a trademark or copyright symbol.
- Establish your usage of acronyms: do you always use the full company first on a page followed by the acronym and then the acronym from hence forth?
- Line out consisties for your service names: Do you always capitalize your service names?

How do you refer to your company or organization?

How do you answer the phone? What do you call your company internally?

List acceptable abbreviations, nicknames or acronyms.

Photo Usage Policy

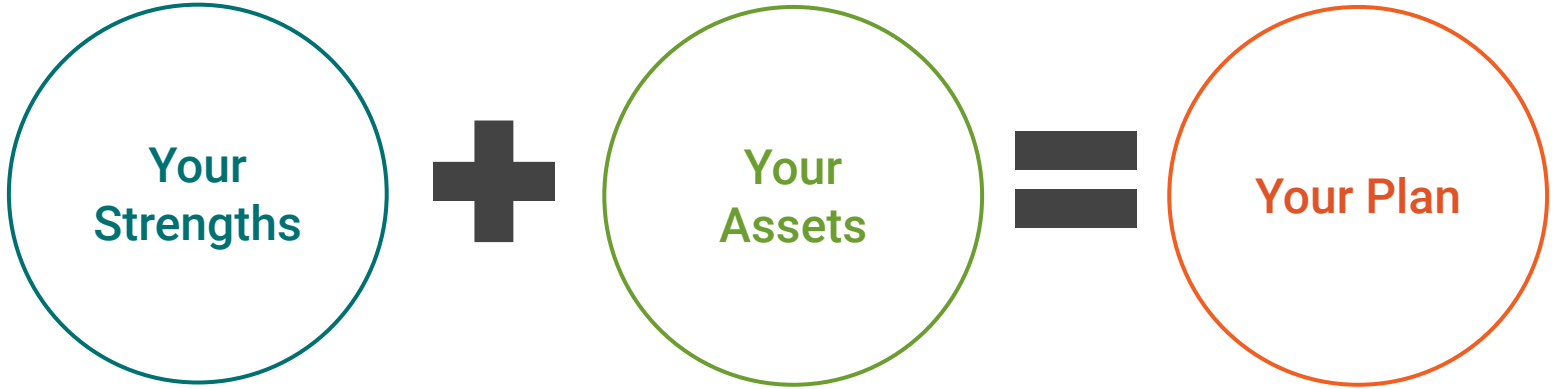
Share photo usage guidelines.

- When, if ever, is it appropriate to use stock photos?
- What style of imagery is acceptable? For example:
 - Close ups
 - Landscapes
 - Photos of people
 - People of a certain age
 - People of a certain lifestyle
 - Funny or serious
 - Textures
- Do images require a specific treatment? Like black and white or color tinting or color overlay?
- Share specific sizing instructions.

Consider...

- Describing what types of landscape is okay in exterior photos, i.e. if you're in the midwest, no mountains or photos of palm trees.
- Any releases you may need for original photos you plan on using, i.e. if you plan to use photos of children at your establishment, you may be required to provide a legal photo release document.

Building Your Plan



What are your strengths?

There is no magic ratio to promote your organization. Many nonprofits try to work their plan around a budget. This is a problem. While that may work for a large organization, it doesn't work for small nonprofits. You are your organization, not just a budget. Your strengths as a person and a team are what allow you to successfully serve your mission. Put them to work in your marketing, too.

Be real with yourself. If you hate writing, don't start a blog. If you freak out about public speaking, don't start a video campaign.

Consider where your strengths lie as a professional, as an organization or as a marketing team. Those strengths will be the cornerstone of your marketing plan.

Marketing Asset Discovery

How can you leverage your existing assets to market your organization and build more assets?

Clients, Leads & Supporters

- Email List/Subscribers
- Past & Current Customers
- Mailing List
- Current Leads & Past Leads
- Facebook/Twitter/Instagram Followers
- Past Event Attendees
- Trade Show Contacts
- Website Visitors

Your Team & Family

- Staff
- Volunteers
- Board Members
- Sales
- Designers
- Writers
- Delivery Truck Drivers
- Interns
- Spouses
- Children

Company Sphere of Influence

- Partner Organizations
- Strategic Alliances
- Referral Sources
- Professional Organizations
- Networking Groups

Processes

- Checkout
- Development
- Waiting Areas
- Bathrooms
- Building Entry & Exit
- Hold Messages

Your Team & Family's Sphere of Influence

- Church
- Gym
- Employers
- Neighborhood Association
- Country Club

Location Resources

- Shared Building Spaces
- Signage
- Window/Display Space
- Sidewalks

Equipment

- Printer
- Vehicles
- CRM
- Smart Phones
- Tablets
- Computers

Existing Marketing Materials

- Previously Designed Ads
- Photos & Videos
- Testimonials & Quotes
- General Purpose Brochures
- Previous Newsletters
- Recurring Events with Established Attendance
- Ad Specialty Items

The trick to marketing on a budget is to look at the things you already have before trying to buy more. Everyone knows money is an asset but what about other resources you have that can help you promote your organization?

Here are a few examples:

If you have an existing **email list** ask them to follow you on **Facebook**.

If you have a **busy waiting room**, put up a sign or better yet a TV to **show a presentation** about how you're doing great things with the help of your donors.

If you **drive** around all day put a **magnet** on your car.

If you have **old photos, testimonials or newsletters** pull content from them to post on **social media**.

If you send out **paper invoices** include a **note** about new services.

If you are located on a **busy sidewalk** use **chalk** to write a message or put up a **sandwich board** with announcements.

If you have **employees** working on a job site have them **hang door hangers** on neighboring houses.

what & where

The Activities You Plan to Do and Where You Will Do Them

Notice the title of this section is “What & Where.” When you outline the activities in your plan, say more than just “what.” Document “where” you’ll be doing the activity.

For example, rather than just list “social media,” get specific. Say “posts on LinkedIn” or “ads on Facebook.”

If you attend networking events, you wouldn’t just list “trade shows” in this category. Document the actual trade shows you’ll attend.

You can even break this into two sections if you want. One for “what” and one for “where,” i.e. Social media with all the types of social media below it, and social ads with all the types of social ads below it, events with all the types of an events outlined, etc.

Pro Tip 💪

I prefer to combine what and where so I have just have one list of activities. I feel like it’s simpler and more concise.

Check out these
[Blog/Podcast Combos](#)

When you’re trying to decide what to do for your marketing or fundraising event:
[Don’t make this mistake in your marketing or fundraising event.](#)

If you're considering starting a blog:
[Should your nonprofit be blogging?](#)

What & Where

Balance Passive and Active Content

As you're building your plan, create a balance of passive and active marketing techniques.

What do I mean by passive and active? Let me divide them into groups, and then I'll explain what's what.

It is essential to pair both of these forms of marketing together. If all you do are passive forms of advertising, you're just sitting back and waiting for people to find your content. It's like saying, "Oh, well, I built it. And so they'll come." But that's not how it always works. When you put things on your website that are noteworthy, it is your responsibility to actively go out and tell people you did it, to invite them to come back in.



Your activity is available to people when they're ready, they find it on their own.



You're taking the initiative to reach out, often interrupting to gain the attention of prospects.

What & Where

Balance Passive and Active Content



Which passive mediums are right for you?

Considering a new website?

PODCAST/BLOG POST

[7 must haves for nonprofit websites.](#)

Passive doesn't mean bad.

Passive online marketing includes your website, blogging, community calendar and more. Some people think passive is wimpy. But in this case, passive doesn't mean wimpy, non-assertive forms of advertising. Your passive mediums are available to people when they're ready, and they find it on their own.

For example, YouTube videos and blogs are both passive forms of online marketing because people find them when they're ready. It's not being pushed in front of them, unless you pay for it. And if you're paying for it, then activity goes into the category of paid online advertising, which is active.

So passive isn't bad, see? Passive is just patient. It allows people to find you on their own, in their own time, at whatever phase of the buying cycle they are in.

I like to think of passive as a safety net for active strategies. Just like your development staff, your active marketing hunts down opportunities for business. And hanging out in the background is your passive marketing working on its own. Just like Batman, ready to jump into action when he gets the signal.

BLOG POST & VIDEO REVIEWS

[Best nonprofit websites of 2020](#)

Balance Passive and Active Content



So what makes active... well...active?

They're active because you're taking the initiative to reach out, often actually interrupt, people to gain their attention. Email marketing, social media, and paid online advertising are ways you can get in front of people who might not be your customers yet, and also remind customers you already have that you exist.

Paid online advertising and social media are like the modern day versions of traditional broadcast or print advertising, like placing an ad on the radio, or in a magazine or newspaper. You're putting your message out in front of other people – actively reaching out to them.

Which active mediums are right for you?

when

The Deadlines for Each Activity

Define Your Timeline

- When are your events?
- When will you run your ads?
- When is an ad due to the printer?
- When do the flyers need to be printed in order to be mailed on time?
- When do you plan on mailing them?

Outline Frequency

You also outline the frequency with which you would do the activities. So this section of your marketing plan might look similar to:

One Printed Brochure for Trade Show Aug 1st

Creative Due – June 15

Send to Print – July 1 (*Allow two weeks for printing and give yourself wiggle room here!*)

Needed in Hand – July 27

Pro Tip

When creating a timeline start with the due date and work backwards. Then you're sure to give yourself the time you need to get the job done well and meet your deadline.

When

If you are doing tons of activities that you'll probably house your timelines on a calendar or spreadsheet. It is important to look at your mix as a whole and the timing of ALL of the things you want to do to ensure you're not overwhelming yourself with activities you can't get done. For example, if you know that you'll be at four trade shows in August and you need brochures for your booth, you need to start working on them in June. Also, don't plan to get a whole lot done the month of August since you'll be on the road the whole time.

Once you get all your deadlines set out, put them on a calendar or put them in a spreadsheet. That way you can sort them and make sure they get done on time.

If you don't set due dates you can't get mad when they don't happen. Life gets in the way. Accountability will slip, and you'll just work in your nonprofit instead of on it. The squeaky wheel gets the grease.

Example Social Media Publishing Process

Here's an example of a monthly social media writing process with due dates we use to schedule monthly recurring social media tasks on the calendars of our writers.

| Monthly Social Media Tasks | Due Dates |
|--|-----------|
| Project Manager Requests Social Media Content from Client Due 1 Week | 1/30/2020 |
| Write Social Media Posts - 4/mo | 2/13/2020 |
| Social Media Graphics & Post Review | 2/17/2020 |
| Art Director Social Media Post Review | 2/21/2020 |
| Revisions from Art Director Social Media Review | 2/25/2020 |
| Send Social Media Posts to Client for approval Due 1 Week | 2/27/2020 |
| Schedule Social Media Posts to Publish | 3/5/2020 |
| Monthly Boosting for \$20 | 3/19/2020 |

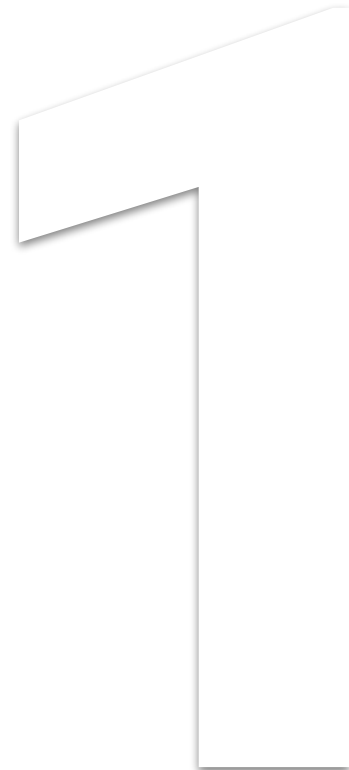
how

Two Parts: Deliverables & Creative

Part 1: Deliverables

The deliverables of your campaign are the physical things you'll be producing and the items you'll need to make the end product. Deliverables are all checkboxes. They're black and white: did you do it or did you not? Leave the grey area for the creative section.

You'll outline the end products and all the things you need to make them because each thing takes time to accomplish. It's incredibly defeating to sit down to design something only to realize you don't have what you need to do it, especially if you're on a tight turn around. Avoid that challenge by outlining everything you need and gathering it ahead of time.



How: Deliverables

Example Deliverables Details

Printed Mailer

- How big will it be?
- How many will I be printing?
- Do I have all the mailing addresses?
- How will I handle postage?
- What are the things that I need to make the mailer? (Text, photos, illustrations, etc.)
- How much time does the printer need to print the mailer?

Online Ads

- Where will you run them?
- What type of ads will they be? (Video, photo plus text, just text, etc.)
- Who will you target?
- What's the ad budget per day?
- How many ads will you design?
- How long will they run?
- When will they start/end?

What deliverables do you need to plan details for in your marketing plan?

Social Media

- How many posts will you make a month?
- What types of posts will you make? (Video, photo plus text, just text, polls, re-posts, etc.)
- On which network will you publish what types of posts?
- What time of day will you post?
- What days of the week will you post?
- What will your post topic mix be?
For example:
10% re-posts from other pages
10% employee recognition
10% asking for donations
15% promoting blog posts
25% fun personality posts
30% showing donors how their donations impact your mission

how

Two Parts: Deliverables & Creative

Part 2: Creative

Some people start with deliverables and then move on to creative, others start with creative and move on to deliverables. It's up to you. Because I'm a creative person, I generally start with creative and outline the deliverables needed to fulfill the creative ideas I have. It doesn't matter what order you do it in. It just matters that you document both.

Creative is a gray area — it's not filled with checkboxes. Here you outline everything from colors to tonality. Each type of activity you plan will be different. Things you might include depending on your plan are:

- Social media topics to post about
- Ideas for blog posts
- Taglines for ads
- Concepts for trade show banners



*Check out these
Blog/Podcast Combos*

Not sure what to write about?

[Nonprofit content ideas for your social media, blog and newsletters.](#)

Not sure what to say?

[The secret to writing content to make and maintain donor relationships.](#)

How: Creative

This is the fun part!

You're going to document every little idea you come up with and highlight every decision you make – here's why: when you're in the mindset of planning out your marketing, magic happens.

Because when it's an ordinary Tuesday, and you just dropped your kids off at school after a tough morning, and you have to sit down and prepare that newsletter, it's not so magic. That's why you document, so you can go back and find all of the magic details you outlined in those sparkling moments.

I find the most inspiration by looking at other items similar to what I'm planning to make and discussing them with my team.

Brainstorming Tools

As you're brainstorming, make copious and complete notes. I suggest typing the notes so you can search for them later (and because if you're like me, you type faster than you write).



Consider using a service like [Otter.ai](#) to transcribe the meeting.



We often use [Loom to capture video](#) of our screens during meetings.



[Qsnap chrome app](#) allows us to make a screenshot of an entire web page, not just the part you can see, and mark it up with text and Paint-like tools.

Pro Tip 🍷

Documenting the Details

You need to outline the creative details and deliverables for each activity in your campaign.

- For each activity make sure to indicate any “must have” creative details, the non-negotiable items. So there's no confusion as work begins.
- We establish the details about each part of our plan in it's own Google doc. We call it our “working document”. As parts of the project are completed we mark them off so at any time a team member can open the document and pick up where we left off.
- If you're recycling content from one item to another make sure to include those details as well as a link to the document.
- Consider establishing a naming convention for all files as well as a folder structure. You want to know for sure the items you're recycling content from, revising or sending to print are the correct files. One person teams have less problems with this initially, the challenge presents itself over time.

budget

The Time and Money to Complete Each Activity in Your Plan

That's right.

Time AND Money.

A lot of people think of budget as just money. And in all cases, money definitely needs to be documented as part of your budget.

How much money will you spend on each ad? How much money does it cost to print the newsletter? These costs affect your bottom line.

Your productivity at work also affects the bottom line. At a certain point, if you're not seeing returns on marketing you're investing a ton of time in. Even if that marketing is "free," it's not worthwhile.

Check out these
Time Saving Resources

BLOG POST

[Marketing project management 101](#)

BLOG POST

[10 intern management tips](#)

PODCAST/BLOG POST

[Time saving tips for promoting and running your online event](#)

PODCAST/BLOG POST

[8 time saving tips for communication](#)

Budget

Let the estimating begin.

Spreadsheets are your best friends.

Take each deliverable from the How section. Make a guess about how long you think it will take you (or whoever it's assigned to) to do each item.

- How long will it take you to write social media posts each month?
- How long will it take you to photograph your staff for staff highlights?
- How long does it take to create a newsletter?

Break each deliverable down to its smallest part, and then estimate high. For example, making a newsletter isn't just about putting it together. You have to write it, revise it, design it, get it approved and schedule it to send. How long with each of those tasks take?

Again, don't underestimate here. If you're feeling optimistic, just add a minimum of a half hour on everything, because it always takes longer than you think it will.

Pro Tip

Estimating time is especially important when setting expectations for management.

If you're the worker bee producing all this stuff, and management just thinks you're *POOF* creating it out of thin air, it's difficult to set their expectations about how much they can receive from you in a given time frame.

If you understand how long it takes you to do something, and they understand how long it takes you to do something, then you guys can compromise on what needs to be done now and what can be done later.

Tracking a time investment in a project means you can quantify time and take it from "it feels like it's taking FOREVER!" to "It's taking more time than last time because _____."

If you're not sure how long it takes you to do something, track it. There's lots of tools out there that will help you do it. The MayeCreate team uses a variety of easy methods: calendars, appointment books, online time trackers, even just plain old notebooks.

Budget

Sample Budget & Time Estimates

| Social Media Posts | UNITS/YR | TIME EST/UNIT | ANNUAL TOTAL |
|---|----------|---------------|--------------|
| NUMBER OF SOCIAL NETWORKS | 1 | | |
| PLATFORMS USED | Facebook | | |
| NUMBER OF MONTHLY POSTS | 4 | | |
| Social Media Posting | 48 | 0.35 | 16.8 |
| Image Design/Formatting | 48 | 0.16 | 7.68 |
| Monitoring & Interactions Each Week | 48 | 0.25 | 12 |
| Monthly Post Boosting | 12 | 0.25 | 3 |
| Account Service | 15% | | 5.92 |
| Total Monthly Hours (divide above annual totals by 12) | | | 3.78 |
| Social Media Total Monthly Cost (multiply total hours by total hourly rate) | | | \$ _____ |

| Printed Newsletter Deliverables | | | |
|-------------------------------------|--------------|----------|--------------|
| Task | # of Hours | | |
| Take Staff Member Photos | 2 | - | 4 |
| Write News Articles | 9 | - | 12 |
| Design Newsletter | 4 | - | 6 |
| Decision Maker Review | 1 | - | 2 |
| Revisions From Decision Maker | 1 | - | 3 |
| Finalize Design for Printer | 0.5 | - | 1 |
| Send Newsletter to Print | 0.25 | - | 0.5 |
| Address and Prep Newsletter to Mail | 4 | - | 6 |
| Account Service (15%) | 3.26 | - | 5.18 |
| Total Estimate Range | 25.01 | - | 39.68 |

Pro Tip

Don't overlook the time it takes you to talk back and forth with the decision maker, email over designs, have phone conversations, all the little things in between each step that keep the project moving.

We call the time in between "account service."

That's a huge part of your job as a marketer! Your time, experience and commitment to completing a project are valuable. The time it takes to do the job well adds up.

analysis

Reviewing Frequency, Key Metrics and Success Indicators

Don't be afraid of getting it wrong.

Any marketer worth their salt understands that tracking is the biggest component to a successful marketing campaign. However, marketing with purpose requires a strong constitution.

You can't be afraid of getting it wrong. You will get it wrong, that's how you learn. Don't back away from reviewing your numbers. Marketing is a social science experiment. You try one thing and then try another and see if it worked or not. You won't know if you're winning if you're not tracking.

Check out my
[Digging Into Data Series](#)

These podcast/blog post combos break down how to review data for your most commonly used marketing mediums.

Part 1

[Reviewing Website Data](#)

Part 2

[Reviewing Social Media Data](#)

Part 3

[Reviewing Email Data](#)

Analysis

Set review intervals.

Make a commitment to your marketing, decide how often you'll review. Not everything will need to be reviewed at the same frequency. I like to look at things like online ads weekly or bi-weekly, while I look at things like social media, email list growth and sales monthly.

When you begin reviewing your data, it's hard to know what's good and what's not, because every campaign is different. Look at a month-over-month comparison and a year-over-year comparison of your metrics when you review results. You won't always see improvement month-over-month due to seasonal services and fluctuation in marketing activities. That's why reviewing your year-over-year is important. Unless you completely stopped marketing, you should generally see improvement year-over-year.

Pro Tip 🍷

Try not to do a ton of week-over-week review. Unless you're engaged in a huge marketing push, it's difficult to compare week-over-week with such a limited amount of data.

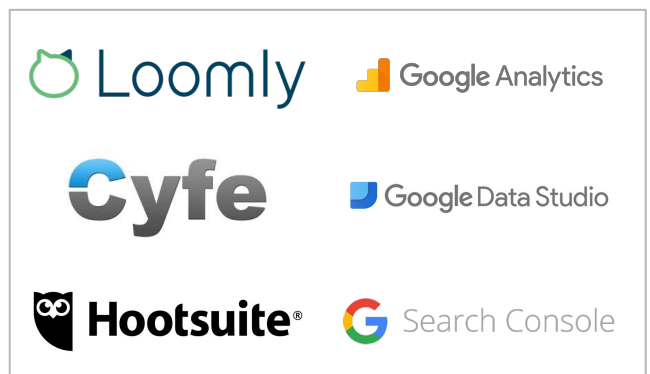
[You can read about more of my favorite tools on our blog.](#)

Make sure you pick the right tool for the job.

The tricky thing with digital marketing is that every channel comes with its own set of metrics and terms, which can be named similarly but are not necessarily the same things. And results will be housed in a unique user interface. This is where monitoring tools come in.

To regularly review your digital marketing data, you need a tool that makes it easy and brings all the data together into one place. Painstakingly gathering data from multiple sources online and compiling them into a consumable format takes far more time than most executive directors have to spare. Find a dashboarding software that suits your needs, or invest in social media management software to report your marketing data in a way you can easily understand that doesn't take you forever to compile.

These are some of my favorite reporting tools:



Analysis

Determine key metrics.

To make your data reviews easy, first determine what key metrics you should look at and other indicators for success.

Each activity you outline in your plan will have different data available to determine the success of the activities. More traditional mediums like print, or activities like networking events, offer limited tracking possibilities. You can, however, look at call volume and website traffic, as well as donor leads.

Key Metrics for Digital Marketing

For online marketing, ah... where do I start? It's so trackable – almost like a vortex of tracking. There are all kinds of lovely metrics you can review to determine if a particular activity is working. For example, if you do social media, you can review how many times your posts were shown and how well people interacted with them. If you post 20 times a month and no one engages with them, you're probably posting crappy stuff.

Your website analytics offer another level of checks and balances for online marketing activities. You can see how many website visitors came from social media and how they behaved on a website. If you get a ton of website visitors from social media but they leave the site immediately, your website might be crappy, or maybe your social posts have nothing to do with your service.

Email Marketing

List Size
Opens
Clicks

Blogging

Page Views
Avg Time on Page
Bounce Rate

Social Media

Follows/Likes
of Posts
Engagement Rate
Impressions
Reach

Website

Sessions
Avg Time on Site
Pages Per Session
Bounce Rate
Traffic Source

Directory Listings

Views
Searches
Activity

Paid Online Advertising

Budget Spend
Search Terms
Clicks
Cost Per Click
Click Through Rate

Analysis

Reviewing Your Marketing Data Pyramid Style

The wide bottom is your plan – the activities you will execute to implement the marketing plan. The narrow top is the end goal of your campaign. That goal defines your most important metric. For example, if your goal is to increase donations, then donation revenue is your most important metric. If you review nothing else, review the amount of money or hours spent on your marketing versus the amount of revenue you brought in.

Start reviewing at the bottom. Remember: this layer is made up of the activities you do in your marketing plan – without this layer, the rest of the pyramid doesn't exist. Meaning, you can't reach your big picture goal unless you do the activities that get you there. The metric you review for this layer is simple – **"Did you do it?"** If you planned to make 20 social media posts – did you make them? If not, how many did you do? More than 20 or less than 20? This bottom layer of the pyramid creates your baseline. Review the activities you did and make sure to document how much it cost to implement your base layer (your marketing plan).

Next review the middle layer(s). For example, if increasing donations is your ultimate goal, you'll review the other metrics that build into donations. You might review call volume, event attendees and website visitors. It would be awesome if you could attribute every lead or phone call to a specific marketing activity, but that's just not possible. Metrics like phone calls, email inquiries and website visitors could be attributed to operating as usual, or to any other type of marketing (like word-of-mouth). Because of this, these big metrics make up the layer just below your main goal and act as big picture indicators.



What are your big picture indicators?

snack on this

A final piece of advice...from a lady who's messed it up a time or two...

Don't get emotionally attached to your plan.

After your plan is set, review it often. Don't be afraid to go back and adjust. You can't be emotionally attached to your marketing plan. Your first answer might be wrong. And that's okay. As you're creating your plan, document alternatives.

When your creative juices are flowing during the planning process, you may have a ton of activities or creative strategies to consider. Some of them likely landed on the chopping block because you don't have enough time or budget to do them initially. Keep a list of all your ideas for Plan B. Then you'll have a handy list of alternates in case the ones you selected initially aren't working as planned.

So once again, when you're creating your marketing plan if you're feeling overwhelmed, break it into smaller steps. These seven areas are meant to guide you through formulating a plan that's realistic and attainable, one you can use to grow your business.



Meet the Author

Monica Pitts

I'm Monica Pitts, the Chief Creative Officer of MayeCreate Design. I'm a matchmaker of form and function. Founded in 2005, MayeCreate focuses on web design and online marketing. I live in Columbia, MO with my husband Mike, two kiddos Ellis and Aveleen and our two pups Roxie and Quimby. I am an audio book junkie, aerialist, yogi, runner, crafter who loves traveling and playing in the dirt.

You can do this!

So nice I'm going to
invite you twice!
I hope to see you
and get your
questions answered.

VIRTUAL OPEN OFFICE

Thursdays from 12 - 1 CST

Jump in a 20 min online meeting with me and 3 other nonprofits who are doing the exact same thing you are – planning their marketing to handle whatever 2021 brings.

Usually I charge \$100 an hour for private consulting but through the end of February these group office hours are free. My gift to help you take that next step towards easier and more successful marketing or as I like to call it “marketing with purpose”.

[Please RSVP for a 20 min time slot](#) so I can keep the groups manageable and the conversation flowing. Repeat joiners are welcome!

[RSVP for Office Hours](#)