

claxon

MARKETING ACTION PLAN

Marketing your mission can seem hard (if it were easy, you probably would have done it by now), but it doesn't have to be! Use the 3 Step approach and activities below to guide you to marketing success. The checklist will help you stay on track.

STEP 1: GET READY

Getting ready means getting clear on where your organization is headed and how marketing can help get you there. You'll assess where you stand now so you can pick the best path forward given your goals. If you skip this step, the others will fall apart!

Activity	Why do it?	To-Do
1) Get focused on organizational goals	Get focused on <i>organizational</i> goals first. You don't want to do marketing for marketing's sake – you want to do it to achieve greater impact! And that means being very, very focused on mission and goals, right? Right.	<input type="checkbox"/> List the key goals for the next 1-3 years <input type="checkbox"/> Discuss why they are important
2) Envision how marketing can support goals	Exploring how marketing can support your organization's goals will help you define your marketing objectives and inform the rest of your planning. It will also prepare you to clearly show how an investment in marketing will support the overall goals of the organization.	<input type="checkbox"/> List how marketing can support the organization's goals (from above) <input type="checkbox"/> Pick your top 2-3 marketing goals for the next year
3) Know your starting point	Assess your current state of affairs when it comes to messaging, mechanisms and other marketing-related items and activities. With a clear sense of where things stand and where you want to go, you'll be ready to figure out how best to get from here to there.	<input type="checkbox"/> Have board & staff members complete the assessment <input type="checkbox"/> Review & discuss results to understand starting point

STEP 2: GET SET

In Get Set, you'll identify your organization's WHAT (your beliefs and compelling qualities), your WHO (your best supporters), and then figure out HOW to use messages and mechanisms to achieve your goals. Get Set ensures you're poised to make smart investments in Step 3.

WHAT Makes You Special?

To get people to engage, you have to get their attention! That means standing out from the crowd, which boils down to being clear on what you believe and how you deliver on that belief more compellingly than your competition.

'WHAT' Activities	Why do it?	To-Do
1) Create your belief proposition	Your belief proposition (which is different than your mission!), will serve as an internal reference and guide the rest of your efforts. To help you craft it, explore why your organization exists and what would be different if it didn't.	<input type="checkbox"/> Write your belief proposition
2) Define what you want to be known for	When you tell people everything you do, it's information overload. If someone is only going to remember one thing about your organization, what do you want it to be? Over time, supporters can learn more about you.	<input type="checkbox"/> Make a list of your key offerings <input type="checkbox"/> Prioritize the list from most important to least
3) Know your competition	Other organizations may share the same belief as you (this is normal, don't worry), you have to really know your competition so you can set yourself apart.	<input type="checkbox"/> List sources of competition <input type="checkbox"/> Write what makes them compelling
4) Explore what makes you compelling	After reviewing what makes the competition compelling, you will be able to explore what makes you stand out from the crowd. You'll identify 3-4 unique differentiators that make you more compelling than other organizations.	<input type="checkbox"/> List your 3-4 most compelling qualities (your unique differentiators)



5) Clarify what makes you <i>most</i> compelling	Finally, clarify the single most compelling thing about you. By knowing the one thing that really sets you apart, you will be able to easily connect with people who care about your cause.	<input type="checkbox"/> Choose your single most compelling quality
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WHO Do You Need to Reach?

In order for your marketing to be most effective, you have to know who can help you most dramatically advance toward your goals. Understanding what supporters like about you and where they found out about you will inform your messaging and the marketing mechanisms you select in the HOW section.

'WHO' Activities	Why do it?	To-Do
1) Identify common characteristics of best supporters	Identify the common characteristics of your best supporters (past and present) so you can hone in on your ideal supporter. By reviewing what your best supporters have in common, you can best assess who you need to engage going forward and where you might find them.	<input type="checkbox"/> Review data on your best supporters <input type="checkbox"/> List their common characteristics
2) Understand why they like you	You may have a certain way of talking about your organization that is different than how your supporters talk about it. Getting their take on why they like you and how they talk about you will help you choose the best words to inspire and engage other supporters.	<input type="checkbox"/> Review input you have from your supporters <input type="checkbox"/> Pull words or phrases they use to describe why they like you <input type="checkbox"/> Call supporters if more input is needed
3) Learn where they find out about you	It's important to learn how existing supporters found out about you so you know the best ways to connect with potential supporters.	<input type="checkbox"/> Review supporter data to see how they found out about you <input type="checkbox"/> If you don't track it, call supporters & ask
4) Describe your <i>ideal</i> supporter	The information you have about your best supporters will help you paint the picture of your <i>ideal</i> supporter. This will ensure you make best use of scarce resources by targeting the right people in the right way.	<input type="checkbox"/> Write a persona for your ideal supporter



HOW Will You Inspire & Engage Your Ideal Supporters?

Once you've reflected on WHAT your organization believes in and WHO you need to reach, you can think about HOW you will inspire and engage them through messages and mechanisms.

'HOW' Activities	Why do it?	To-Do
1) Define your brand personality	How you talk, write, look and act reflects your brand personality (and this reflects what you stand for and what you believe). Consistency is key. That's why you'll define your organization's brand personality. This quick exercise will help you find your true and authentic voice as an organization.	<input type="checkbox"/> Pick three adjectives to describe your organization's brand personality.
2) Craft your top-level message	Bring together much of the work you've done up till now to help you craft a compelling and succinct top-level message that can be used when writing or talking. This message will get at the essence of your organization and will ring true for your ideal supporters. Although really hard, you need to pick three words that will be used every single time someone talks, tweets or types about your org.	<input type="checkbox"/> Pick your three key words <input type="checkbox"/> Craft a spoken top-level message <input type="checkbox"/> Craft a written top-level message <input type="checkbox"/> Fill out your Messaging Framework
3) Identify your marketing mechanisms	Once you have your top-level message, it's time to get it out there! Look back at how your best supporters found out about you and determine the most effective ways to connect with them. You can also review the mechanisms you already use today to see which you will keep using, and which you may decide not to use given your newfound knowledge and focus.	<input type="checkbox"/> Refer back to where supporters find out about you <input type="checkbox"/> Choose the marketing mechanisms you'll focus on for the next 12 months



STEP 3: GO!

In Step 3, you'll put all of your planning into action! You will create a Marketing Action Plan (or MAP) that is specific, measurable, action-oriented, realistic and time-bound (in other words, it'll be S.M.A.R.T.). You'll also document all the thinking and decision-making that went into your MAP so that you stay focused and avoid Shiny Object Syndrome as you move forward.

Activities	Why do it?	To-Do
1) Create your Mechanism Calendar	It's time to turn all of your planning into action. A calendar will ensure everyone knows what you're doing, why you're doing it, who's responsible, who's contributing, how much it will cost, and when it'll be done.	<ul style="list-style-type: none"> <input type="checkbox"/> Create a calendar marketing mechanism chosen (Here's a template.) <input type="checkbox"/> Assign owners, timelines and costs
2) Define your success metrics	If it's worth doing, it's worth measuring! Set success metrics for each marketing mechanism you've chosen to pursue. Success metrics allow you to see what's working and what's not!	<ul style="list-style-type: none"> <input type="checkbox"/> Determine how you will measure success – choose metrics <input type="checkbox"/> Establish a baseline for each metric (if possible)
3) Monitor, measure & adjust. Repeat.	With your success metrics clearly identified, you can then monitor your action plan against those metrics, and adjust as needed. At the end of the year, you'll know which investments paid off, which activities worked, and be able to confidently create Marketing Action Plans for years to come.	<ul style="list-style-type: none"> <input type="checkbox"/> Review the plan at 3, 6, and 12-month intervals to ensure it's on track <input type="checkbox"/> Make adjustments if needed

