



Increase and Diversify Your Membership, Participation, and Support

Presented by Karen Buck, MNM
Conservation Impact

Land Trust Alliance Rally
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Overview

Purpose

- To introduce marketing concepts and tools that can be applied to reach and engage conservationists, neighbors, and constituents and achieve specific results

Outcomes

At the end of the session, participants will be able to:

- Apply concepts and tools to meet specific membership, fundraising, and program goals
- Create a practical marketing plan to guide programming, outreach, fundraising, and membership activities
- Identify and reach *new* audiences and more deeply engage *existing* audiences
- Integrate a strategic approach to marketing that helps to build a stronger, more sustainable organization

Contents

- Basic Principles
- A Snapshot of Your Marketing Plan
- Marketing Mini-Audit
- Creating a Marketing Plan
- Marketing Matrix
- Implementation
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- Appendices
 - Planning Hierarchy
 - Marketing Plan Outline
 - Strategic Positioning Process
 - Frameworks and Definitions



Basic Principles

What Marketing Is

- Understanding the interests of your target market and creating the programs and strategies so they take action on your behalf
- Providing programs, services, and offerings that are relevant to your target market
 - More than the message; distinct from communications and public relations
- Implementing target-market-tailored strategies consistently and systematically across your organization

You never don't market

What Marketing Is *Not*

- *Not* selling or convincing
- *Not* persuading someone to buy something they don't want or need
- *Not* about reaching everyone who "should" care
- *Not* writing a brochure, putting up a Facebook page, or updating your website
- *Not* doing good work and waiting for people to notice

"If we build it, they will come" is not a marketing strategy

Context

- Marketing means understanding your target market and acting upon that understanding
 - Using language that resonates with them
 - Providing programs, services, and offerings that interest them
 - Being where they are
- This often means doing thing differently, but...

Customization, done within the context of your mission, ≠ mission drift

Put Simply...

- Marketing takes all the great stuff you do and gets tons of other people to be as passionate and engaged as you are
- Most organizations don't reach a broader audience because they don't market to them

A Snapshot of Your Marketing Plan

A Good Marketing Program...

- Is supported by a well-researched, objective *strategic marketing plan*
- Emanates from an *intimate understanding* of the constituent
- Reaches the target market in a way that is *meaningful* to them
- Is *integrated* throughout the organization
- Creates a *constituent-centered* mindset
- Achieves specific *goals*

Purpose

- Marketing goal
- Desired behavior

Market Analysis

- Situation analysis as context
- Potential market population
- Market segmentation
- Target market criteria and selection
- Target market profile

Your target market (or potential target market) is not you

It is necessary to complete the market analysis before you determine strategies to reach the market

Strategies to Reach the Target Market

- Position, brand, and image
- Public relations and communications
- Offerings
- Outreach and engagement strategies

Unless you have unlimited resources, select only one or two target markets

Marketing Mini-Audit

- Indicators of what a strategic marketing efforts includes
- Take a moment and ask: where is my organization for each indicator?

Indicator	Notes
Who are your organization's three target markets, in priority order?	
What are the defining characteristics of those target markets?	
When asked about the organization, do all board, members, staff, and volunteers say something that sounds similar?	
Have you changed mission, name, or logo more than three times in the last two years?	
Do you have a standard style sheet for all communications (verbal, written, and electronic)?	
Do all spokespeople have key speaking points to focus on whenever the opportunity presents itself?	
Do you have a goal that specifically defines "to develop awareness"? How do you measure success for that goal?	
What mechanisms are in place to translate awareness into some specific action?	
Do people external to the organization perceive it the same way people internally do? How do you know?	
Which is more effective for your organization – a newsletter, a special event, or a webpage? Why?	
What contact do you have with members and donors on a regular basis?	
What is the relationship between program staff and membership / development staff?	
Are program staff and board responsibilities for engaging constituents explicit and clearly understood?	
What systems are in place to turn a member / donor into a lifelong, loyal and engaged constituent?	

Creating Your Marketing Plan

Step	Key Question
1. Define your marketing goal(s)	What are you trying to achieve through marketing?
2. Consider the external environment or context	What are the social, political, economic, industry trends and issues that impact your work?
3. Define the largest potential market	What is the scope of your efforts and who is impacted by them?
4. Segment the potential market	How does the audience relate to your services or marketing goals?
5. Select target market(s)	Based on target market selection criteria and marketing goals, which markets are most likely to take action on your behalf?
6. Research and build a profile of the target market	How does the market behave, what are their values, attitudes, lifestyles, what do they think about, how do they make decisions, who influences them?
7. Design programs, services, and offerings to effectively engage those markets based on their values and attitudes	What programs, services, and offerings are most likely to meet the needs and interests of the target market? (Consider all your programs, services and offerings)
8. Create outreach, communication, and public relations strategies to reach target markets	What strategies provide the most value in the eyes of the market?
9. Measure success in meeting your marketing goal(s)	How will we measure progress and how often will we monitor results?

Defining Your Marketing Goal

- Goal = an outcome statements of what you will accomplish in a given timeframe
- SMART Goals
 - Specific endpoint, result or product
 - Measurable or detectable
 - Achievable
 - Realistic
 - Time-framed

- Sample marketing goals:
 - Create a comprehensive coordinated approach that identifies target audiences, increases the organization’s visibility, and provides a uniform message
 - Double the land trust’s volunteer base over the next two years to ensure that needed stewardship, governance / leadership, and fundraising tasks are accomplished
- Consider: What is the action you want people to take on your behalf?

Segmenting the Market

- Segmentation is based upon the way a particular segment of the market behaves relative to your product or service
- This process that helps define a group of people based on demographics and psychographics such that you can market specifically to them
- Target marketing targets a specific segment you deem likely to take the desired action
 - This segment is your target market
 - Not exclusive / elitist, but focused
- Target marketing ensures the most effective return on investment

Segment	Description
Heritage-ers	Want land to stay the way it is; leisure related to appreciation and respect for the land; likely to enjoy hiking and fishing; more traditional family values; likely to be active volunteers and contributors; patriotic, loyal, strong sense of place
Holistics	Seeking balance, peace, simplicity; converge social, ecological, and spiritual issues; seeking alternative ways and a better world; hopeful, high potential for engagement; value integrity (actions have to align with beliefs), and balance
Quality-of-lifers	Striving for the good life / economic prosperity, somewhat materialistic, less politically-engaged, 1 st generation whose earnings likely to be less than parents, so economically insecure; value pragmatism, building family and community

Researching Your Target Market

- Doing the research is essential – don’t assume you know all there is to know about the target market
- Research strategies:
 - Focus groups (great for new target markets)
 - Listening questions (great way to build Board involvement)
 - Secondary research
 - Market research done by others (local economic development office or university)

The Marketing Matrix

Goals:

Target Market Criteria:

Organizational Purpose/Image:

Target Market	Profile	Needs / Interests (relative to your cause)	Desired Behavior	Position, Message & Brand	Product / Service	Outreach / Promotion / Public Relations

Building the Matrix

- Target Market: Heritage-ers
- Profile:
 - Want land to stay the way it is
 - Leisure is related to appreciation and respect for the land
 - Likely to enjoy hiking and fishing
 - More traditional family values and community values
 - Likely to be active volunteers and contributors
 - Patriotic
 - Value loyalty
 - Have a strong sense of place
 - Tend to be retired or close to retirement (baby boomers); 22% of county population is in this age range
 - White collar, most have been in same career for many, many years
 - Most have lived their whole lives in the state
 - May feel less economically secure (i.e., losses to 401K and pensions)
- Desired Behaviors:
 - Sign up as stewardship or committee volunteers
 - Become loyal annual members

Needs / Interests (relative to your cause)	Position, Message & Brand	Product / Service	Outreach / Promotion / Public Relations

Implementation

Moving from Planning to Implementation

- Implementing your marketing plan includes:
 - Completing projects (beginning, middle, end)
 - Building new systems, programs, etc. that will be ongoing
 - Integrating these projects and new pieces into your existing operation
- The Project Management Cycle:
 - *Define and Organize* – goal, timeframe, who’s involved?
 - *Plan the Project* – building the project plan (tasks, deadline, responsible party)
 - *Manage the Project* – pull together the project team, motivate and delegate
 - *Monitor and Adapt* – set benchmarks and report progress
 - *Close the Project* – take time to debrief and learn each time

Developing Board / Leadership Buy-In

- Include board and staff leaders on project teams
- Identify and work with “champions” first
- Share this training with them
- Search for webinars and articles to share
- Stay on message:
 - Recent research¹ shows that managers who deliberately communicate the same messages repeatedly, and use a variety of mediums to do so, move their project along more effectively – ***whether their authority is formal or informal!***

Coordinating Marketing and Fundraising

- Understand where your marketing strategies intersect with fundraising efforts – audience, timing, use of staff and volunteer resources
- Explore opportunities for leverage
- Keep volunteers apprised
- Both marketing and fundraising are concerned with creating and deepening relationships
 - Those that manage relationships best, win!

¹ It's Not Nagging: Why Persistent, Redundant Communication Works by Kim Girard, Harvard Business Review, April 18, 2011, <http://hbswk.hbs.edu/item/6629.html?wknews=04182011>

After the Basics

Strategic Positioning

- More sophisticated planning considers brand, position, and image
- A more externally focused, market-driven analysis to define the organization's identity and niche
- Position considers competitive environment and niche opportunities
- Potent organizations fully occupy and own their niche
- Positioning capitalizes on distinction and assets to go to the next level

Sample of Alternative Positions and Their Implications

Identity:	Outdoor Volunteerism	Trails
Themes	Recreation focus Conservation focus	Recreation Nature / habitat corridors Greenways/ river
Results	Volunteer engagement	Changes to trails
Strategic focus	Volunteerism –civic engagement	Trails and recreation access
Brand	Best outdoor volunteer experience	High quality technical trails
Position	Largest outdoor volunteer group	Largest volunteer trails group
Message	Volunteering is good	For your enjoyment
Target markets	Volunteers / any group w/ outdoor projects	Trail users and user groups
Competition	Habitat for Humanity	Special interest groups Place based groups
Strategies	Diverse volunteer opportunities	Trail projects Prioritized by trail use

Examples

- Local land trusts positioned relative to state, issue, and national organizations
- Local land trusts positioned relative to other conservation and environmental groups
- Non-adversarial, i.e. the good guys
 - Deschutes Land Trust – relative to watershed groups
 - Wood River Land Trust – relative to smart growth
 - Plains Conservation Center – relative to county open space
- Opportunity or expectation of audience
 - Mohonk Preserve – leadership position “yours to lose”

Data Mining

- Consider what is really known about your current constituents and how you collect information about them
 - Have clear questions you want answered
 - *Not* what they think about you; what you want to know about them
- Use every opportunity build the database and populate it with relevant information
 - And have a plan for how to use that information

Building Loyal Engagement

- Find ways you can adapt your practices to facilitate real engagement
 - Even how the phone is answered!
- Maximize each interaction with the target market using:
 - Consistent calls to action
 - Consistent requests for feedback
- Ensure that your systems to allow for ongoing, interaction and feedback
 - Do you have the appropriate technology for ALL board and staff?

Social Media

- Consider your marketing goal and target markets to decide how important a tool this is for your organization
 - We are approaching the point where all nonprofits are expected to have a social media presence (Facebook in particular), whether it is good fit for your marketing plan or not

Social Media CAN* be Good for	Social Media is NOT Good for
Tapping into the social networks of constituents to find new supporters	Building your organization's database (unless you convert them!)
Coordinating volunteers	
Chance to demonstrate that you "get" the target market and what they care about	An insincere approach to marketing; trying to be all things to all people
Engaging visitors	
Time-limited calls to action	Passive means involvement (i.e. on tabs)
Urgent, need-based, time-limited fundraising	General fundraising
Interacting with supporters (real dialogue)	Tightly controlled communication / messages
Promoting events to attendees	Selling sponsorships

* If you keep it updated and use the social media platform consistently

Social Media Trends

- 2011 eNonprofit Benchmarks Study (www.nten.org)
- Changes in online giving (2009 – 2010) (domestic groups only)
 - Increase in dollars raised: 10%
 - Increase in number of gifts: 7%
 - Increase in size of average gift: 2%
 - Average gift size – environmental groups: \$46 (one-time gifts)
- Ratio of email list subscribers to Facebook fan page users = 1000 : 110

Facebook-Specific

- 2011 Benchmarks Extra: Facebook (www.nten.org)
- Annual fan page churn was 14% in 2010 (churn = # of unlikes / unsubscribes divided by number of fan page users in one year)
- Avg. fan page had 5 views / 1,000 Facebook users on a daily basis
- Avg. # of likes or comments / fan page post was 1.9 / 1000 impressions for environmental nonprofits (2.6 is average)
 - For small organizations (under 10,000 Facebook fans) this rises to 5.0 / 1000 impressions
- Want to appear in your users' "Top News" feed? Get there through:
 - Affinity (amount of interaction the user has with your page)
 - Weight (number of likes and comments) and type of content (photos and manual posts "weigh" more)
 - Time (how recent your post is)

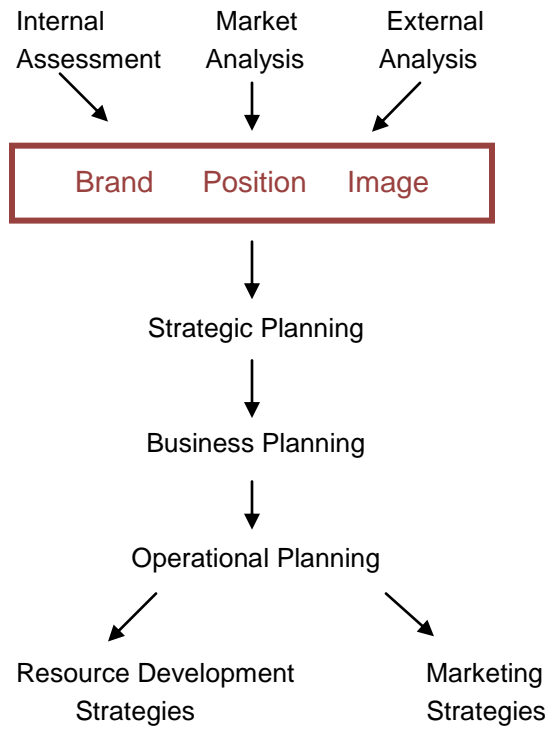
If Social Media is an Important Tool for your Marketing Plan, then...

- Evaluate organization capacity: staff time allocated, who will be responsible?
- Identify your timeline
- Measure success
 - Define your metrics that mean success and establish your baseline
 - Set your schedule
 - Don't forget feedback (qualitative data)
 - Find proper measuring tools (Google Analytics, Twitter Analyzer, Facebook Analytics, Post Rank, etc.)

Notes



Appendix 1: The Planning Hierarchy



Appendix 2: Marketing Plan Outline



Introduction

- Purpose of marketing plan
- Marketing goal

Situation Analysis

- External trends and issues
- Internal capacity, opportunities and obstacles
- Stakeholder perceptions
- Competitive analysis

Market Analysis

- Market segmentation
- Target market criteria
- Target market profiles

Outreach Strategies

- Position, brand, image
- Offerings - programs, products, services
- The value proposition
- Communication, message
 - Visual identity and graphic standards
- Public relations
- Engagement and outreach
 - Direct contact
 - Advertising and media relations, campaigns
 - Promotions and special events
 - Strategic Partnerships

Organizational Design and Capacity

Implementation Plan

Appendix 3: Positioning Process

Situation analysis

- Trends, issues
- Industry growth and changes
- Institutional landscape

Competitive / comparative environment

Constituent / potential constituent interests and unmet needs

- Demographics and psychographics – how people behave relative to a product or cause
- Market trends
- External to organization, not satisfaction surveys
- Opportunities and unmet needs

Organization's distinctive competencies and assets

- Underutilized assets
- Distinct history, brand, strength
- Latent or untapped potential

Gaps, needs, or unsolved problems

- Overlap of external needs and internal assets

Alternative positions

- Geographic sphere
- Competencies
- Market niche; Other?

Strategically advantageous / feasible / necessary position

- Position decision
- Organizational implications
- May redefine brand, image
- Implications for strategic decisions

Then, strategic plan based on position

Organizational design and development

Appendix 4: Definitions



Constituent: Necessary in the formation of a whole; an integral component.

Efficacy: The power to produce intended results.

Strategic: Organization-wide, deliberate, calculated decisions, based on the internal, external, and market context, and future trends and conditions.

Brand: The endearing and enduring characteristics of an organization, the organization's essence. It is what makes an organization distinct and distinguishable. Often referred to as the emotional or visceral response that is evoked by the organization (or product). Brand is everything an organization does, not just what it says, and thus is linked to an organization's reputation and integrity.

Constituent-Centered: Aligning all aspects of an organization around an understanding of the core constituent to create loyal, engaged, long-term relationships. A constituent-centered organization sees the world through the eyes of their constituent. Being constituent-centered is not just a task of the membership department or fundraisers.

Core Constituents or Target Markets: Those people who are necessary to the success of your organization. They are the people that you serve or that are necessary in order for you to meet strategic goals in programming, marketing, and fundraising. The core is your target market – those who care or potentially care enough about the organization or cause to take significant, meaningful action on its behalf.

Market Segments: Some portion of the market for purposes of categorizing and defining the population in ways useful to your organization. Traditionally, markets are segmented by demographics, though segmentation by values, attitudes, and lifestyles (psychographics) is much more useful.

Marketing: The process of defining and analyzing the market to provide products and services, and the outreach strategies, to best resonate with the market – i.e. to meet their needs so they take the action you want (volunteer, become members, donate) or change behavior (i.e. vote, stop smoking).

Outreach Strategies: The groups of activities to reach and engage the core constituency. Strategies include programming, services, direct contact, events, and earned media. Outreach strategies are more than an organization's message or communications plan. Strategies must be aligned with the constituent to be effective.

Positioning: A systematic, analytical process to define the organization's place and niche within its sphere of influence, or potential sphere.

Psychographics: The values, attitudes, lifestyles, and behaviors referring to a particular market segment.

Public Relations: One aspect of an organization's outreach strategy. It includes the relationships that an organization has with its "publics" and is about creating a positive and strategic public image, such that marketing can take place.

Social Marketing: The process of applying marketing principles to a special class of problems. It is designed to help social change agents influence people to take actions that improve their own welfare or that of the broader society.

Sustainability: Having the human, financial, technological, and organizational resources to provide services to meet needs and attain results towards mission on an *ongoing basis*. Sustainability requires the organizational / programmatic infrastructure to carry out core functions *independent of individuals or one-time opportunities*.

Upcoming Webinar – November 8

Coordinating Marketing and Fundraising

Tuesday, November 8, 2011

12:00 – 1:00 MDT

A land trust engages its community and builds its base of support through two critical organizational functions: *fundraising and marketing*. Frequently, these two functions target similar groups of people, use common tools, and are assigned to the same staff or volunteers.

Yet despite this overlap, many land trusts neglect to deliberately coordinate marketing and fundraising. “Coordinating Marketing and Fundraising” walks you through a simple step-by-step process to dovetail your organization’s marketing and fundraising efforts in order to:

- Use staff and volunteer time most effectively
- Take full advantage of opportunities to grow support
- Present a more coordinated image to your target markets and donors
- Increase fundraising totals and marketing goal results!


This webinar will:

- Explore the relationship-building process that is at the core of both fundraising and marketing
- Introduce key metrics any organization can use to evaluate its current efforts
- Discuss specific tools and strategies that bring together these functions and increase and more deeply engage your land trust’s support base.

Now is the time to learn how to more efficiently meet your fundraising and marketing goals and incorporate new strategies into next year’s work plan!

For more information or to sign up, visit:

<http://www.conservationimpact.com/>



Conservation Impact provides comprehensive organizational development consulting to nonprofits and related public agencies dedicated to environmental quality and natural resource protection. Founded in 1996, Conservation Impact has worked on more than 765 projects with nearly 500 organizations nationwide and internationally.

The company specializes in strategic planning and positioning, marketing, and organization analysis and development. We use an Integrated Strategy approach that looks at organizational identity, capacity, and constituents. We help our clients go to their next level of development.

The Conservation Impact staff bring significant expertise in nonprofit management, marketing, and conservation planning with degrees in biology, ecology, environmental conservation, nonprofit management, and public administration.

Conservation Impact's sister company, Nonprofit Impact, provides consultation and training to organizations and agencies dedicated to community and public health, education, and human services.

For more information about the companies, our team, or our work, please call us at 303.223.4886 or visit us online at www.conservationimpact.com



Shelli Bischoff-Turner ■ Karen Buck ■ Leni Wilsmann ■ Kristen Grigsby



1792 Wynkoop Street, Suite 307 | Denver, CO 80202
303.223.4886 | www.conservationimpact.com