

**Marketing: Increase & Diversify Your Membership, Participation & Support**

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Sample Training Workbook



## Overview

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### Purpose

- To introduce and apply the concepts of marketing to reach and engage conservationists, neighbors, and constituents for mission, money, and members.

### Outcomes

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

- Apply marketing concepts to meet specific membership, fundraising, and program goals
- Systematically identify and target new audiences
- Create a more constituent-centered organization
- Easily and simply create a practical marketing plan

### Contents

- Self Analysis
- Marketing Plan – a snapshot
- Frameworks and Definitions
- The Basic Principles
- Creating a Marketing Plan
- Market Segmentation
- Marketing Matrix
- Sample
- Conclusion
- Appendix
  - Marketing Plan Outline

## Marketing “Mini” Audit

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- ✓ Who are your three target markets, in priority order?
- ✓ What are the defining characteristics of the target markets?
- ✓ When asked about the organization, do all board, members, staff, and volunteers say something that sounds the same?
- ✓ 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 for the organization have three key speaking points to focus on whenever the opportunity presents itself?
- ✓ Do you have a strategic goal that specifically defines “to develop awareness” or “to enhance outreach”? 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 the organization the same way people internal to the organization perceive it? 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 and protocols are in place to turn a member to a donor to a lifelong, loyal and engaged constituent?

## Marketing Plan – A Snapshot

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### Purpose

- Marketing goal
- Desired behavior

### Market Analysis

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

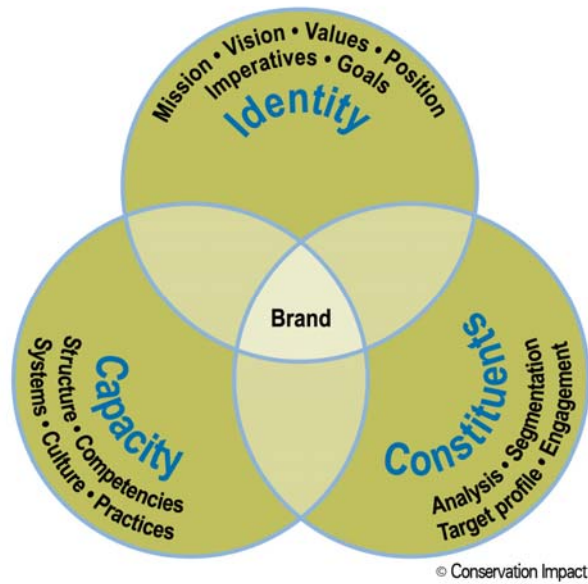
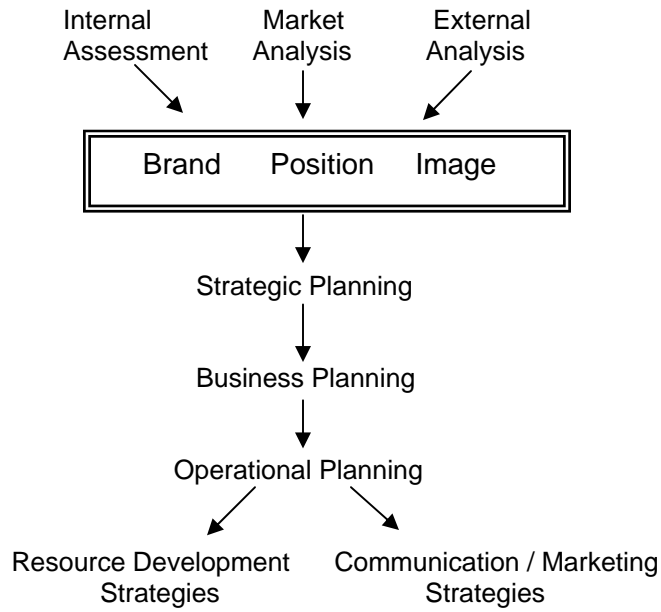
### Strategies to Reach the Target Market

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

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

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

## Frameworks



## Definitions

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**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.

**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.

**Target Market or Core Constituents:** 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.

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

**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.

**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.

**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).

***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 is much more useful.

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

***Public Relations:*** Public relations is 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.

## Basic Principles

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### Marketing / Selling / Communications

- Marketing is *understanding* the interests of your audience and creating the *programs* and *strategies* so they take action on your behalf
- *Not* selling
  - Not persuading someone to buy something they don't want or need
  - Not about reaching everyone who "should" care
- Marketing is distinct from communications, public relations and outreach
  - Effective communications underlies all marketing efforts
  - Marketing is *more* than "the message" or a communication strategy
- Marketing is first, providing programs/ services/ products (offerings) that resonate and are relevant to the target market
- Outreach strategies include direct contact, advertising, earned media and promotions, increasingly outreach is through an electronic medium
- The future of marketing is customized, individualized marketing to the "masses" and continues to be a customer relationship management (CRM) task
  - Those that manage relationships best, win!

### Segmentation and Target Marketing

- Segmentation based on the way a market behaves relative to your product or service
  - A process that helps define a group of people based on demographics and psychographic such that you can market specifically to them
- Target marketing ensures the most effective return on investment
  - Not exclusive but focused

### Simply ...

- Marketing takes all the great stuff you do and gets tons of other people to be as passionate and engaged as are you and your most loyal, engaged constituents
  - Most organizations do not reach a broader audience to support its work because they do not market to them (but rather have a "if we build it, they will come" marketing strategy).

## A Good Marketing Program...

- Is supported by a well researched, objective and deliberate, *strategic marketing plan*
- Emanates from an “*intimate*” *understanding* of the constituent
- Reaches the constituent in a way that is *meaningful* to them
- Is simple, systematic, *strategic*
- Is integrated through-out the organization
- Creates a “*constituent-centered*” mindset
  - Sees the world from the eyes of the constituent
- Achieves specific *goals*

**You never *don't* market.**

**Recognize that your market and potential market is *not* you.**

## Positioning

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*A strong brand, position, and image gives you power to reach people, to help make choices, and to get you what you need to achieve your mission. You must design the organization to communicate brand, position, and image in everything you do.*

*Brand, position, and image is not creative magic.  
It is based on sound analysis and deliberate strategic decisions.*

### Identity = Image

- Do others perceive your organization the same way you describe your organization?

### Strategic Positioning

- What is your distinct position relative to others providing similar or complementary services?

### Brand

- What does your organization “stand for” in the minds of the audience? What is the organization’s essence?

### Focus

- What is your strategic focus?

## Creating a Marketing Plan

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### Define your marketing goals

- What are you trying to achieve through marketing?

### Describe the external environment or context

- What are the social, political, economic, industry trends and issues that impact your work?

### Define the largest potential market

- What is the scope of your efforts?

### Segment the potential market

- How does the audience relate to your services or marketing goals?

### Select target markets

- Based on target market selection criteria and marketing goals, which markets are most likely to take action on your behalf?

### Know and understand those target markets

- How do those markets behave, what are their values, attitudes, lifestyles, what do they think about, how do they make decisions, who influences them?

### Design services / programs to effectively engage those markets based on their values and attitudes

- These are *all* your programs, services and issues – not just what your marketing department does.

### Create outreach, communication and public relations strategies to reach target markets

- What strategies provide the most value in the eyes of the market?

### Measure success in meeting marketing goals

## The Marketing Matrix

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Goals:

Target Market Criteria:

Organizational Purpose/Image:

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

## After the Basics

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### Data Mining

- What do we really know about our current constituents and how do we collect information about them, NOT about what they think about us?
- Do we use EVERY opportunity to collect and build our database and to populate it with pertinent information?

### Permission Marketing

- How do we turn everything we do into an opportunity to market (reach out) to our constituents and ask them to take action on our behalf?

### Using Social Networks

- How do we tap into the (physical or virtual) social networks of our constituents?
- How do we create our own social networks?
- How do we build on the “power of one?”

### Building Loyal Engagement

- How have we adapted our practices to facilitate real engagement?
- Have we updated all our systems to allow for ongoing, 24/7 interaction and feedback?
- Have we built “connection” into everything we do?

### Investment in Outreach

- Have we re-defined how we measure outreach success to mirror 21<sup>st</sup> C. realities? (i.e. not just web clicks and certainly not the 2% return on direct mail!)
- Do we have the appropriate technology for ALL board and staff to create a highly engaging, interactive, dynamic, and current electronic outreach platform?



## Appendix: Marketing Plan Outline

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- I. Introduction
  - A. Purpose of marketing plan
  - B. Marketing goal
  
- II. Situation Analysis
  - A. External trends and issues
  - B. Internal capacity, opportunities and obstacles
  - C. Stakeholder perceptions
  - D. Competitive analysis
  
- III. Market Analysis
  - A. Market segmentation
  - B. Target market criteria
  - C. Target market profiles
  
- IV. Outreach Strategies
  - A. Position, brand, image
  - B. Offerings - programs, products, services
  - C. The value proposition
  - D. Communication, message
    - 1. Visual identity and graphic standards
  - E. Public relations
  - F. Engagement and outreach
    - 1. Direct contact
    - 2. Advertising and media relations, campaigns
    - 3. Promotions and special events
    - 4. Strategic Partnerships
  
- V. Organizational Design and Capacity
- VI. Implementation Plan

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Conservation Impact is dedicated to helping organizations achieve results towards environmental conservation, resource sustainability, and public and community health. We provide comprehensive organizational development consulting to nonprofit organizations and public agencies.

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, focuses on organizations and agencies dedicated to improving the health and well being of individuals and communities and those working to create a more civil, just, and equitable society.

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](http://www.conservationimpact.com) or [www.nonprofitimpact.com](http://www.nonprofitimpact.com).

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**CONSERVATION IMPACT**  
focus | mission

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