



How to create a Marketing Plan:

Contrary to popular belief, marketing is not the exclusive domain of private sector profit making industries. Community organisations rely on volunteers, donors, funders, supporters and consumers just as much, and a well prepared Marketing Plan will help in the process of attracting people to your organisation and its overall objectives.

This simple Guidance Note provides some basic information on how to create a Marketing Plan.

What is a Marketing Plan?

A marketing plan is a business document outlining your strategy and tactics. It's often focused on a specific period of time (12 -36 months for example) and covers a variety of marketing-related details, such as income, expenditure, goals, impacts and action steps.

The Marketing Plan is not a static document. It needs to change and evolve as your organisation grows, and as new and changing sector trends develop, and it can be as **simple or as complex** as you want to make it, dependent upon your resources and capacity.

Purpose of a Marketing Plan:

Even in business, many owners or corporations create a marketing plan and then set it aside. However, the Marketing Plan is a road map providing you with essential directions towards your ultimate organisational goal: It is a living evolving document and should be re-visited regularly.

What does it involve?

In the first instance, the plan will require some thought and preparation. There needs to be a willingness to adopt and develop a Marketing Plan. Without this, the plan will simply be consigned to the dustbin of rarely read documents.

The Executive Summary:

A high-level summary of the marketing plan as a whole, and a paradox on paper: This is the last section that you should write, but the first section that should be in the finished report. It is always best to keep the Executive Summary as short and sweet as possible: Just a couple of sentences as a summation. While writing it, imagine that you are going to present it as an *elevator pitch*. Once you have finished it, read it out aloud. If it takes you longer than ten seconds, it probably needs to be simplified even further. Always remember that less often means more: The Executive summary is just a *taster* for other things to come.

The challenges:

This section should contain a brief description of the services and or products that your organisation offers. With each description, include goals that you want to set for each service or product. Keep

the number and complexity of your goals at a maximum of three per service or product, and remember that they need to be concise, measurable, and moderately easy to achieve.

Organisational analysis:

Apart from using organisational analysis to reflect on your proposed Marketing Plan, it is probably a useful exercise in itself and should be repeated over time. This could include an understanding of your short, medium or long term objectives, what the focus of your organisation is, or should be, how do you perform culturally or attitudinally, and where do you see your strengths, opportunities or weaknesses.

Stakeholder Analysis:

Stakeholder analysis complements organisational analysis: It requires you to think about who your clients or consumers are, where they live, work and play, how they access your services and what they want from you in return. It stands to reason that your Stakeholder analysis could include beneficiaries, supporters, donors or funders.

Competitor Analysis:

It is a fact of life that the world is changing, and as a result the voluntary sector is being affected. Uncertainty over grant regimes are an ever-present worry for community organisations, as is increased competition for goods and services. It therefore stands to reason that your Marketing Plan might need to address your potential competitors (who they are, where they are and how they are delivering their products or services).

Explain your strategy:

Explain the strategy that you and your team have developed and agreed upon.

- Why did you choose this strategy?
- What other alternatives did you consider and why did you discount them?
- Why do you feel that it's the best possible strategy for your organisation?
- How long have you set the strategy for?

Describe your service:

This is crucially important for funders, supporters and donors. This could include:

- Details about your service or project – what is it?
- Who benefits and how?
- Who does it reach and why?
- Are there any geographical constraints?
- Do you work in partnership or collaboration with others and who are they?
- How many consumers or clients have you reached or assisted over the past 12-24 months?
- What opportunities have you exploited and how have you done this?
- What opportunities could you have taken advantage of with further income or resource?

Think about the history of your organisation and its impact in the local community. Pay particular attention to the following:

- How well are you known and why?
- How powerful is your *brand* and your reputation?
- How have you changed people's lives?

Income and Expenditure:

Remember that this is not a set of audited accounts. However, if you are looking to raise money through your Marketing Plan, then you will need to cost out and inform potential funders of the level of income you need. Funders expect this. Being clear and transparent about the costs of your service and how it could or should be funded is an important element of the Marketing Plan. As with all things finance related, the costs need to be thought through and as accurate as they can be.

Promotion:

Some thought needs to be given to circulating and advertising your plan. If no-one sees it, the plan has limited value. While most smaller community organisations do not have the capacity or income required to deliver *paid-for advertising*, free advertising is available if an organisation looks hard enough. Think web-sites, local leaflets, places of interest and community papers: Harness the strength of other groups to help you advertise. Most Counties across the UK have infrastructure organisations like Support Cambridgeshire who would only be too willing to circulate and advertise your plan through websites, partners and collaborators. Do as much as you can to advertise your plan: You never know who might be reading it.

Conclusion:

This is an expanded version of your executive summation. Always end your Marketing Plan on a positive note, never a negative. While there are challenges to be overcome, illustrate what you have done, and the difference that has made.

Resources:

Further support and guidance on preparing a Marketing Plan is available from Support Cambridgeshire. Simply contact: info@supportcambridgeshire.org.uk

Other Resources:

https://www.ourcommunity.com.au/marketing/marketing_article.jsp?articleId=1511

<https://www.wikihow.com/Create-a-Marketing-Plan>

<http://www.smartinsights.com/marketing-planning/create-a-marketing-plan/how-to-create-a-marketing-plan/>

<https://www.marketingdonut.co.uk/marketing-strategy/your-marketing-plan/preparing-a-marketing-plan-checklist>

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