



DIY MARKETING PLANS



Get Organized for Success

Why Use a Marketing Plan?

- Create effective, successful campaigns
 - Stronger messaging
 - Testing
 - Find synergies between campaigns
- It's an effective project management tool
 - Understand capacity
 - Set team expectations
- Align messaging to your organization's overarching goals

Components of a Marketing Plan

- Goals
 - Metrics
 - Budget
- Target audiences
- Positioning and value proposition
- Messaging and calls to action
 - Marketing collateral, both visual and textual
 - Landing pages
- Schedule

When to Build a Marketing Plan

- These can include a lot!
- Use marketing plans for...
 - Organization-wide, year-long plans
 - Promoting a program or department's work
 - Fundraising: galas, appeals, etc.
 - Conferences and event promotion
 - Launches
- For smaller campaigns, simplify the process!
- We'll focus on campaign specific plans

The Process

The Process

1. Set Goals
2. Explore Target Audiences
3. Find Your Position and Explain Your Value
4. Develop Your Key Messages
5. Create Your Content
6. Create a Schedule

Generating Messages

Keep it simple!

Goal 1

- Target Audience **A** -> Key Message **1**
-> Key Message **2**
- Target Audience **B** -> Key Message **3**

Goal 2

- Target Audience **A** -> Key Message **4**
- Target Audience **C** -> Key Message **5**

Example:

Goal 1: Fight hunger with food waste

- Parents -> Schools to allow donations
-> Teach students to donate
- Students -> Donate uneaten lunch

Goal 2: Stop school food waste

- Parents -> Ask PTA to address issue
- Teachers -> Ask admin to address issue

1. Set Goals

Goal Setting

- Purpose
 - Goals are the guidepost for your entire campaign
 - Goals align each element of the plan
 - Set conversions/metrics to prioritize
- Start with your organization's mission
- Set only 3 to 4 per campaign
 - These should be campaign-specific, but point to your mission
- Don't make these about metrics... yet

Goals – Examples

- *Inspire the public to waste less food*
- *Get signatures on our petition*
- *Bring in new donors*
- *Get restaurants to sign up for our program*
- *Stop a CAFO from getting a permit*
- *Get community leaders to read our new report*
- *Pressure the city council to adopt a resolution*
- *Get voters to support a measure*

Goal Setting – Assigning Key Metrics

- Take each goal and assign a key metric (or two)
- Answer the question: “How will I measure whether this campaign was a success?”
- Top level should be for the overall success of the campaign
- One metric should measure conversions
 - This allows you to build a benchmarking framework to judge your messages and strategies

Conversion: *A specific, measurable action that you want the viewer of your content to take*

Goals & Metrics – Examples

- *Inspire the public to waste less food*
 - 1st – Clicks to food waste website
- *Get signatures on our petition*
 - 1st – Petition signatures | 2nd – Clicks to petition pages
- *Bring in new donors*
 - 1st – Donations | 2nd – Clicks to donation page
- *Get restaurants to sign up for our program*
 - 1st – Program enrollment | 2nd – Requests for more info
- *Stop a CAFO from getting a permit*
 - 1st – Permit not granted | 2nd – Calls to county commissioner | 3rd – Clicks to page with call script
- *Get community leaders to read our new report*

- 1st – Report downloads | 2nd – Clicks to report page on the site
- *Pressure the city council to adopt a resolution*
 - 1st – Resolution adopted | 2nd – Petition signatures | 3rd – Clicks to petition pages
- *Get voters to support a measure*
 - 1st – Measure passed | 2nd – Emails captured | 3rd – Clicks to landing page

Campaign Types

- It may help to consider the type of campaigning you’re running:
 - Public Education and Action Campaigns
 - Goal: Change audience’s habits and/or encourage action
 - Focuses: Program adoption or event promotion
 - Institutional Change Campaigns
 - Goal: Change an institution’s policies
 - Fundraising Campaigns
- These are informal categories

2. Explore Target Audiences

Target Audiences

- Purpose
 - Improve the efficacy of your messaging
 - Set marketing strategies
 - Speed up your decision-making process
 - Better understand your constituents

*Target Audience: Simply put, a group of individuals
who have something in common*

- Identify 1, 2 or 3 per campaign – you’ll make a message for each

Be specific! Think ahead.

- Use your goals and associated calls to action:
 - If you want people who eat meat to eat less, a good starting audience may be “meat eaters” and then refine further
 - Is there a group who has an outsized impact?
 - Limit by location if possible – especially with advertising
 - A balancing act:
 - Who wants/needs your message? vs.
 - Who can you reach?

Target Audiences & Campaign Types

- Public education and action campaigns
 - The goal is to be specific and realistic
- Institutional change campaign types
 - Decision makers – set policy and culture
 - For Government: representatives, governors, mayors, city council
 - For Businesses: customers, employees, competitors in some instances

Identifying Target Audiences

- Two approaches:
 - Defining Characteristics
 - Interests and Behaviors
- There's quite a bit of overlap
 - What's important? Focus your message and understand your audience
- Get to know your target audience by meeting with them!

Defining Characteristics: These are the things that describe someone at the basic level

- Profession
- Location
- Language
- Demographics
- Socioeconomic situation
- Other defining characteristics, like parenthood, stage of life

Interests and Behaviors: These are the things that people care about or are interested in

- Hobbies and behaviors
 - Products they buy and where they shop
 - The things they enjoy
- Political beliefs
- Institutions or media they interact with regularly
- External issues that affect their daily lives
 - Poor air quality, proximity to a CAFO

Target Audience Examples

- *People who care about buying sustainable food*
- *Wealthy food purchasers who consider themselves foodies*
- *Rural people in Iowa who most likely support Big Meat*
- *Parents in Cleveland*
- *Professors teaching environmental science at Ivy League schools*
- *Customers of Walmart in Wyoming*

Digital and Social Media Targeting

Each platform is different, but all share these elements

- **Interest-based targeting** – the terms, keywords media or brands that a person engages with, shares, mentions or even just views occasionally
- **Behavior-based targeting** – the societal, economic or product-related qualities that a platform has deduced about its users
- **Demographics**
- **Location**
- **Language**
- **Specific accounts’ audiences** (your account or another’s)
- **Technology used**

3. Find Your Position and Explain Your Value

Competitive Analysis

- Competitive Analysis:
 - ID your “competitors,” explore their strengths and weaknesses and then determine how you are different (your positioning)
 - First, do a general competitive analysis for your organization
 - If you haven’t conducted one, this is a great tool!
- Co-Competitors
 - We’re all on the same side!
 - Learn from your co-competitors and adopt their successful strategies

Competitive Analysis – Steps

- Determine your co-competitors and industry competitors
- What do they do that differentiates them from their competition? What innovations, products or perspectives set them apart?
 - This is their “Value Proposition”
- What “weaknesses” do they have? Are they missing opportunities?
- Who are your competitors’ main target audience?
 - Are they your target audiences too?
 - What can you learn from how they address and engage with these audiences?
 - Who are they not talking to?
- Use what you’ve learned to describe your Value Proposition!
 - What sets you apart?
 - What can you do better than any other org?
 - What unique perspective do you have?

Positioning and Value Proposition

- Conduct a mini, informal competitive analysis for your campaign
 - What approaches can you “steal”? What opportunities are there
- Apply your positioning and value proposition to this campaign
 - What unique perspective or “products” do you offer?
- In aggressive campaigns against an opponent, why is your position the right one?
 - What arguments of yours do they not have an answer for?

- Be able to address their critiques

4. Develop Your Key Messages

Key Messages

- Key Message Statements
 - A succinct statement written for a target audience that summarizes your argument
 - Used as the basis of the content you'll create throughout the campaign
 - You may not use these verbatim
- Typically, for each goal you'll write a key message statement per each target audience

Key Messages – Elements

- Attention grabber
- Context
 - Connect to target audience and show value proposition
- Call to action

Each element can be adjusted per target audience.

Goals Generate Calls to Action

- Turn each Goal into a general call to action
 - These should be very general and top-level
 - These will evolve later when applied to specific target audiences
- Examples
 - *Inspire the public to waste less food -> Learn how to waste less food*
 - *Get signatures on our petition -> Sign the petition today to fight...*
 - *Stop a CAFO from getting a permit*
-> Write a letter to Congressperson...
-> RSVP to attend our rally on...

Key Message Development – Formulas

- Attention Grabber -> Value Proposition -> Call to Action
 - Simple but effective. Attention grabber tied to target audience. Value proposition is front and center in context
 - Example: *You're hungry for great pizza! We make the best pizza. Buy a slice!*
- Attention Grabber -> Connection to Target Audience -> Call to Action
 - Attention grabber stays constant, but the context changes. Can work in value proposition, but not necessary
 - Example: *Sweaters are warm. You're cold. Buy our sweater!*
- Problem for your Target Audience -> Your Solution -> Call to Action
 - Powerful format. Value proposition a key part of solution

Key Message Examples

- Example 1:
 - Goal: Inspire the audience to waste less food
 - Target Audience: Household Food Purchasers

- Key Message: *Did you know people in the US waste 25% of the food they buy? Think of all the money you could save on groceries by not wasting food! It's time to do something about it. Plan your week's meals before going to the grocery store!*
- Example 2:
 - Goal: Stop a CAFO from getting a permit
 - Target Audience: Outdoors people in the Hometown River basin
 - Key Message: *Big Meat Farms has a track record of polluting local waterways and the Hometown River is in its backyard. Don't let Hometown River get ruined by the toxic runoff from hundreds of thousands of hogs. Keep our kids safe! Call County Commissioner Jones and tell them you don't want Big Meat Farms in our backyard.*

5. Pick Your Strategies

Campaign Strategies

- These are the actual ways you'll be addressing your audience
- Organic, Non-Paid Examples:
 - Advertising:
 - Digital – Social Media Ads, Search Ad, Native Ads, etc.
 - Physical – Print and Signage

Picking Your Strategies

Considerations Overview

- Target Audience
 - Priority #1 from an efficacy standpoint
- Will you be advertising?
- Budget
- Team's Capacity
- Relationships to Leverage

Strategy Considerations: Budgeting

Start by getting organized. Determine budget for the below:

- Vendors: Designers, Public Relations, Marketers
- Advertising
 - Digital
 - Divide your budget among platforms and key messages or audiences
 - Keep in mind minimum daily spend requirements
 - Make allowances for testing
 - Physical
 - Examine distribution and impression numbers closely
 - Target audiences are your guidepost here

Other Strategy Considerations

- Team's Capacity

- Be conservative. Allow time for: implementation, evaluation, refinement and reporting
- Relationships to Leverage
 - Who in your network can you leverage to get the message out?
 - What strategy will they be most likely to support/share?
 - Can you ask them before you start?
 - Who else can help you get in front of your audience?

6. Create Your Content

Organizing Your Content – Overview

Organization is critical!

1. Start with each Strategy
2. Assign Key Messages to each Strategy (there will be overlap)
3. Consider the collateral specs. needed for the strategy:
 - Visual Collateral – the images, headers, graphics etc.
 - Written Collateral – headlines, captions, preview text, URLs
 - Video and Audio Collateral
4. Will you be testing different approaches/concepts for the collateral?
5. Assign a name for each final set of content: Concept A, B, C, etc.
6. Simplify where you can!

Organizing Your Content – Example

Strategy: Social Media

- Key Message 1: Food waste wastes \$
 - Concept A – Food in the Trash
 - Photo: food in the trash
 - Headline: throwing money away
 - Concept B – Grocery List Template
 - Photo: grocery bill
 - Headline: grocery list template
- Key Message 2: Food waste & climate
 - Concept C – Earth on Fire Graphic
 - Concept D – Tomatoes Dumped in Landfill

Strategy: Email Marketing

- Key Message 1: Food waste wastes \$
 - Concept B – Grocery List Template
- Key Message 2: Food waste & climate
 - Concept E – Interview with Municipal Compost Manager

Creating Your Content

Use Project Management! Some tips:

- Assign a core group to develop drafts
 - Include a representative of each impacted team if possible
 - Assign staff to bring drafts to meetings – a starting place is critical
- Ask the larger team for feedback, but be clear that not all feedback will be incorporated
- Be clear about who will be the giving final approval

Creating Your Content

- Now it's time to create! Some tips:
 - Think about your audience's emotions:
 - Anger, sympathy and humor are powerful tools
 - Be creative, but remember:
 - Simple and clear is better than powerful but confusing
 - If you can't explain it easily, your audience won't get it
 - Be willing to “kill your darlings”
 - Finding the “right” image is often impossible and takes FOREVER
 - If you can't find it, then move on or take your own
 - Remember: You can test your concepts

7. Create a Schedule

Project Manage the implementation of your strategies

- Who is doing what and when?

The Goal:

- Create a timeline for when your messages go out
- Be realistic about capacity
- Help staff to hit target deadlines and adjust where needed
- Coordinate different strategies for the strongest impact

Once complete, assign tasks to staff

Creating a Schedule for Advertising

- Scheduling is critical for successful advertising
 - Allows you to optimize for the highest ROI
- Divide your Budget and spread it across the schedule
 - Ensures you're able to spend your budget
- Provide the space to test to get better results
 - Testing may take a few days to be statistically relevant
 - Example: A/B Test for 2-3 days | 4-5 days for the winner

Process Review

- Set Goals
- Explore Target Audiences
- Find your Position and Explain your Value
- Develop Your Key Messages
- Pick Your Strategies
- Create Your Content
- Create a Schedule

Template Resources

The below templates will serve to help your team build its campaigns and set schedules for them.

Campaign Structure Template

Fill in the below for your campaigns to help your team create key messages. Add or remove rows where needed.

1. Goals
 - Goal 1:
 - Goal 2:
 - Etc.
2. Target Audience
 - Target Audience 1:
 - Target Audience 2:
 - Etc.
3. Value Proposition
 - Value Prop. 1:
 - Value Prop. 2:
 - Etc.
4. Key Message
 - Key Message 1:
 - Key Message 2:
 - Key Message 3:
 - Key Message 4:
 - Etc.

The below table can also be used to organize campaigns. Rarely will your campaigns break this evenly, so feel free to add/remove columns as needed.

Goal 1				Goal 2			
Target Audience 1		Target Audience 2		Target Audience 3		Target Audience 4	
Key Mes sag e 1	Key Mes sag e 2	Key Mes sag e 3	Key Mes sag e 4	Key Mes sag e 5	Key Mes sag e 6	Key Mes sag e 7	Key Mes sag e 8

Campaign Schedule Template

Fill in the below for each strategy to create a schedule for your campaign. Add columns for the duration of your campaign. The performance section can be used to track progress towards budget and roll unspent funds forward.

Example: The following is an example to show you how these spreadsheets can work. This campaign is about promoting farmers' markets and uses an A/B test between photo with apples, oranges or strawberries with oranges as the winner.

Strategy 1 – Instagram			
	Week 1	Week 2	Week 3
Concept	Farmers' Markets (A/B Test)	Farmers' Markets (A/B Test)	Farmers' Markets (Winner)
Tested Variable	Photo for Post	Photo for Post	N/A
Options	Apples vs. Oranges	Oranges vs. Strawberries	Oranges
Spend	\$300	\$300	\$600 + \$32 from previous
Performance			
Spend	\$270	\$298	\$631
Clicks	300	350	850
Impression	25,000	28,000	60,000

Strategy 1			
	Week 1	Week 2	Week 3
Concept			
Tested Variable			
Options			
Spend			
Performance			
Spend			
Clicks			
Impression			