



CHECKLIST

✓ MARKETING PLAN CHECKLIST

ELEVATION

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Nonprofits and marketing: a classic love/hate relationship. On one hand, all nonprofits know that their brand position affects donations, but it can be easy to cut that budget line first and deviate from marketing plans made previously.

Early brainstorming and preparation is crucial to keep focused and on track.

This marketing plan checklist is sure to put you in cruise control all year long.





1. Summary of Plan and What's Included

Some things never go out of style, and an introduction to any overarching document is one of them. Start your plan with a brief explanation of your organization, some of the main items and goals included in the report, and the overall focus for the plan.



2. Competitor Analysis

Researching your competition is always essential to stay on top of your game. For a nonprofit, the word competition might sound strange since the common goal is to help others and not compete. But investigate what similar organizations are doing successfully and how your niche clients and customers can benefit from that, too. Also, look into what efforts might be working against them.



3. SWOT (strengths, weaknesses, opportunities, threats) Analysis

Along with the research into your competition, starting a plan like this offers the opportunity to take an introspective look at your nonprofit and create a **SWOT analysis**. SWOT stands for strengths, weaknesses, opportunities, and threats and is a platform for you to say what's working, what's not, and to anticipate future obstacles. Use this as a reminder of what to work on and what to watch out for.



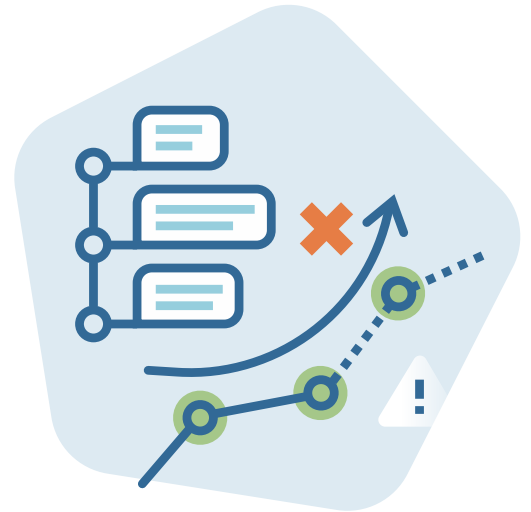
4. Buyer (Donor) Personas

Terms like “target demographic” and “target audience” might sound more familiar but it's time to update that marketing jargon and replace those with “buyer personas” or “donor personas.” Your buyer personas are your targets but in much more detail. **How old are they? What do they do for a living? Do they have children? Where do they spend free time? Do they like musical theater, professional football or both?** Answering specific questions like these will help you create not just a demographic but an entire persona you look to serve or with whom you'd like to fundraise. You know where they spend time and with whom they spend it. It's up to you to reach them there.



5. Buyer's (Donor's) Journey

Another term to consider now that you defined your buyer personas is their buyer's journey. HubSpot defines the buyer's journey as **"the process buyers go through to become aware of, evaluate, and purchase a new service."** This adds value to your plan because it provides a basis for anyone creating content. It informs what part of the buyer's journey these customers might be in or which part of the journey you're trying to reach.



6. Goals

The goals of your report will end up being the most important part of the whole plan. **Without setting SMART, clear, and specific goals, it becomes very hard to stay on track.** Write down by exactly how much you want to increase donations. Include percentages and hard numbers to make sure that you are holding your organization and yourself accountable.



7. Unique Selling Proposition (USP)

The Unique Selling Proposition (USP) provides the answer to the question, what is unique about your product or its sale?. In nonprofit terms, **what is it about your donation system that is unique?** Perhaps 100% of donations go towards operations and programming or maybe certain fundraisers have rewards for guests and participants. Share that info and let people know what's different.



8. Marketing Materials - Which ones will you use?

Your marketing materials will drive the information that is disseminated to your public so be sure to choose ones that they're sure to pick up and read. Refer back to those buyer personas. **Find out if your patrons prefer physical mailers like flyers and brochures or if a monthly e-newsletter and regular blog posts are the way to reach them.**



9. Online Strategy

Similar to your marketing materials, your online strategy depends on who your buyer personas are and where they're spending time online. **A couple essentials that should be included in this section are social media and SEO.** These two go hand-in-hand as active Facebook and Twitter accounts are considered when Google is ranking sites for its search results. Yoast's SEO plugin for your website is a helpful tool that allows you to define custom keywords and meta-descriptions for each page of your site. Combine that with Google's AdWords grant for a stellar SEO program.



10. Promotion Strategy

Promotions and marketing can be terms that are difficult to separate since each one feeds the other, but think of promotions as your organization's overall presence and image and marketing as specific campaigns. Research is going to drive your promotions so look into strategic events and conferences that would benefit you to attend and what membership associations will allow you to better position yourself as a thought or industry leader.



11. Measurement Methods

The "M" in SMART goals stands for measurable. **If it can't be measured, then it can't be a goal.** Check the systems in place to track donations and what other tools you might need to analyze donation trends each quarter. Be specific when reporting your numbers and include by how much you exceeded or missed your goal. Accepting any missed goal is the first step in being sure you adjust and achieve it the next time around.





12. Conversion Strategy

How will you convert potential donors and funders into the real deal? Take all of the information you've gathered from your online and promotions strategies and create documentation or case studies that will help to close those folks on the cusp of becoming financial gamechangers.



13. Partnerships

Strategic partnerships play a key role in the nonprofit world. Identify those who are key players and philanthropists in your region and sector, and strategize ways to connect with them. Also identify what the end goal is of that relationship. It could be to make a fundraising ask, to seek access to their social circles, or to even seek a consultant-like opinion from time to time.



14. Referral Strategy

Put in place a way to thank anyone who has referred donors and helpers to your organization. Discounted entrance to the annual gala, free performance tickets, or even involvement with the organization's decision making are all good ways to say thank you. Keep in mind that different levels of referrals and subsequent thank yous might be necessary to satisfy a wide range of helpers depending on your nonprofit.



15. Retention Strategy

So you've gone through the steps, created your marketing plan, and put it in place. You've seen an uptick in donors and community members seeking out your nonprofit, and you arrive at the question of how to retain these enthusiastic people.

- **First**, remind them how important they are to your work and that new initiatives wouldn't be possible without them. Tell them in your emails and post pictures of your volunteers' efforts on social media to let them know what a difference they make.
- **Second**, maintain consistent marketing efforts with your plan as your guide. Now that more donors are present, make any necessary adjustments to the plan to include specific information and content for these new folks. Maybe you need a new buyer persona to help cater to these new and unique needs. Keeping people first will allow them to keep you first.

A marketing plan might not be something that your nonprofit has used and stuck to in the past, but taking the time to create one now will only help. Having a clear, written plan allows you to stay on track and focus on specific goals and avoid deviation. **Equip yourself, your team, and your board by creating one of your own!**

