

Marketing & Communication: Strategic Planning 101

How to Create a Three-Year Marketing and Communication Strategic Plan That Obtains, Maintains, Retains, and Strengthens Stakeholder Relationships



SOUNDING
B O A R D

Marketing & Communications

RESONATE YOUR MESSAGE

INTRODUCTION

All too often, well-meaning organizational or district leaders will put together a list of marketing and communication activities — like, “Make a brochure, send out postcards, start a newsletter” and call it a “Marketing and Communication Strategic Plan.” There are several factors that both negatively and positively affect how your organization will carry out its activities — competition, collaboration, opportunities, weaknesses — and some activities, based on these factors, are more logical to deploy

first, than others. When we see strong brands — Nike, Coca Cola, Chevrolet, and countless others — marketing, we see the end result of extremely well-researched, strategically timed, placed, and designed advertising that was tweaked, changed, scrapped and redone after survey and focus group testing. These campaigns are created not with the end result — “A strong advertising campaign” — in mind, but with the company’s goals at the forefront, along with a very thorough analysis of the factors that will leverage success throughout the campaign.

In this guide, ***Marketing and Communication Strategic Planning 101*** you will learn the steps that your organization needs to take to develop a three year strategic plan to improve your organization’s marketing and communication. Don’t let the size of this document fool you — this is an outline ... your final document will be much more detailed.

Some things to keep in mind as you use this guide:

1. **It’s free**—please feel free to share it with others!
2. Strategic planning of any kind, including marketing and communication, is not the result of one person sitting at their desk and typing out a plan. Strategic planning should and does include others who are involved with deploying the plan. In order to thoroughly analyze the factors that will guide the success of your organization’s marketing and communication strategic plan, as you review this outline, make note of the people who you need to include in this process.
3. Strategic planning takes time ... be patient with the process, as the process will unveil answers to questions or address challenges you may not have already realized.
4. This guide can also be used with a single department or for a single program, small organizations, or large organizations.

5. You may also reprint the text contained in this free guide in your own writings — like your website, blog, or newsletter — **as long as you credit Heather McGowan of Sounding Board Marketing & Communications as the author and link back to the website www.sounding-board.net.**

I wish you all the best in a very successful execution of your Three Year Strategic Marketing and Communication Plan!

If you need any assistance with your plan, please contact Sounding Board Marketing & Communications at 916.673.8868 or hvmcgowan@sounding-board.net.

THREE-YEAR MARKETING AND COMMUNICATIONS PLAN OUTLINE

I. Executive Summary

This section briefly describes your organization and a summary of the outcomes expected from the Marketing and Communication Strategic Plan. Be sure to summarize the marketing and communication challenges faced by your organization.

II. Situation Analysis

Some key pieces of information that should be included in the situation analysis are the results of an organizational communication audit. The communication audit steps are not defined in this guide, but please contact Sounding Board Marketing & Communication if your organization needs assistance in performing a communication audit. Many assumptions are made about stakeholders' beliefs and opinions about an organization's communications — and communication audits, which include focus groups and surveys with stakeholders, are an effective way to test and gather information and feedback about how your organization communicates with its stakeholders.

In this section, include the following:

- ✓ Your organization's Mission Statement

- ✓ Organizational objectives and business development goals: This is key — you need to be able to link your marketing and communication objectives to your organization’s overall goals
- ✓ Culture of your organization’s current market niche: This section briefly analyzes the make-up of the organization’s current market niche and factors that affect their decision-making process. What’s a market niche? It’s who you serve. In the “Market Segment and Climate Analysis” of this Marketing and Communication Strategic Plan, a more detailed analysis is provided of each of these sectors.
- ✓ Primary strengths and weaknesses of your organization: Please note, these are the *primary strengths and weaknesses of your organization*—and these do not have to necessarily be marketing or communication oriented. These could be things like, “Lack of trust among employees and our stakeholders” or “Unstable budget.”

III. Market Segment and Climate Analysis

In this section, each market segment is thoroughly analyzed, and includes a climate analysis. What’s a climate analysis? A climate analysis provides information on any growth trends in your market.

Competitor Analysis

This section provides an analysis of your organization’s competitors*, based on the following factors:

- ✓ *Market position:* Where are they in your market?
- ✓ *Competitors’ Strengths:* What do they do well?
- ✓ *Competitors’ Weaknesses:* What don’t they do well?
- ✓ *Competitors’ Market shares:* Who do they serve?

* A note about competitors: Being in the service industry, educators and non-profit staff members tend to balk at the word “competitor”. Don’t be afraid to list competitors! A “competitor” can be defined as a specific company/organization and even an

interest/activity/service that compete with your services! I once had a client that wanted to market an educational program that focused on recruiting students who had dropped out of their home high school and did not want to return to their high school. One “competitor” was identified as being “employment” because employment by these drop outs was an interest or activity that would potentially compete with the program’s ability to successfully recruit them to this program. In fact, just by identifying employment as a competitor, we were able to develop specific messaging that addressed this particular challenge, by noting the higher wages and salaries the students could earn by completing the program (which included a high school diploma) and the job training provided by the program. This greatly assisted in the success of this marketing campaign.

Also, “competitors” can actually be co-identified as “collaborators” which are outlined in the next section. Some competitors cannot provide all the services that you can, and, in some cases, may refer others to your organization that they are unable to serve. Just because they are listed as a competitor does not preclude your organization from also collaborating with them.

Collaborators

Collaborators are businesses and organizations with whom your organization could develop a partnership and/or serve as a member in order to further your organization’s growth goals.

Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

This section analyzes your organization’s strengths, weaknesses, opportunities and threats from a marketing and communication perspective.

One thing that tends to occur with the SWOT analysis is that an organization will see more weaknesses and threats listed than strengths and opportunities. And people get so disappointed ... “Wow, look at all of our weaknesses!” So, I always ask the question, “How can you turn a weakness or threat into an opportunity?” and boy, do people’s eyes get wide! For example, let’s say your organization’s weakness is “Lack of proactive communication.”

When I see this weakness listed, I can think of at least four opportunities ... can you? Let’s see:

- 1) Organization has an opportunity to develop a monthly electronic newsletter highlighting its news and accomplishments to send to its stakeholders

- 2) Organization has an opportunity to develop quarterly “Coffee with the Superintendent” events to which parents, district community members, staff and parents can come and talk with the superintendent, and where the superintendent can share news and information about the district.
- 3) Organization has an opportunity to develop and execute a media relations strategy in order to develop an ongoing relationship with local and television media representatives and share positive stories on a consistent basis.
- 4) Organization has an opportunity to develop a news page on its website to share organizational news stories.
- 5) And the list continues ...

So, remember, weaknesses and threats are an opportunity...to create more opportunities!

IV. Marketing and Communication Strategy

So, now we’re finally getting to the section where you get to let your ideas flow. But, when you look over your SWOT analysis, I’m sure you’ll already see that you’ve written down many of these ideas! In this section, you will be taking time to discuss what your organization is about...what makes it special, and how you’re going to let others know how special your organization is.

Product

Being in the service industry, education and non- profit leaders tend to get stumped — we don’t churn out products! However, understanding what your organization does, and what it does well, and what makes it special is key to marketing — because, what are you actually marketing?

What makes your organization special? Simply stating “well-educated students” or “service to those in need” isn’t going to cut it ... every other organization like yours is saying the same thing.

Your product needs to be specific, descriptive and particular to your organization. In this section, you will be basically answering the question, “What is valuable about what my organization provides to its audiences?” Determine what problems your organization solves for its audiences. You cannot be everything to everyone within a particular market, but you can help to solve specific problems. Create a value proposition to position the value you provide and the benefits that your audiences will receive with your solution.

Pricing:

This outlines your organization's pricing for products/services/events/etc., where applicable.

Promotion:

First, if you haven't done so already, define your internal and target external audiences. Your internal audiences can be roughly defined as your organization's staff members and board members — these are the audiences that are a key part of making you're your organization operates. Your target external audiences can be roughly defined as your organization's partners, potential partners, and main users of your organization's product(s).

Next, define the means you will be use (and are currently using) to market and communicate your organization to your internal and target external audiences.

Goals and Objectives:

This section outlines specific goals and objectives/activities indicated with specific measurements or metrics that will define the success of this marketing and communication strategic plan.

A note about metrics: This is by far, one of the most important things you need to include in your Marketing and Communication Strategic Plan. Metrics answer the question, "Were we successful and how were we successful?" Marketing and communication costs money and takes time — metrics will measure whether your organization is getting a return on investment, which is a key to determining future marketing and communication activities. Metrics include specific goals your organization wants to achieve through the marketing and communication activities (i.e., "Increase parent involvement by X%" "Improve positive attitudes and beliefs about the school district by Y%" "Increase event participation by Z%").

Marketing and Communication Activities:

So, after you've done a thorough market analysis and SWOT analysis, and defined your metrics, you are ready to develop your marketing and communication activities!

First, review the findings from your communication audit—if you haven't already done one, then include a communication audit as a Year 1 activity. Then, take a look back at that SWOT analysis — the "Opportunities" that you listed are a great place to start listing activities. Next, review your organization's strengths and weaknesses, as well as those listed in the SWOT analysis — identify any marketing and communication activities that will solve any of the business problems (weaknesses)— and support your business solutions (strengths), and include them in your list.

Last, identify other marketing and communication activities that will support the metrics that you previously identified. Internally, your organization will need to develop a project management approach that identifies people who are responsible for carrying out the marketing activities, timelines, and follow up activities.

Year 1 Activities:

Outlines the marketing and communication activities that will occur in Year 1. If your organization has not already performed a communication audit, this would be a key activity to include in your Year 1 activities. The communication audit steps are not defined in this guide, but please contact Sounding Board Marketing & Communication if your organization needs assistance in performing a communication audit. Many assumptions are made about stakeholders beliefs and opinions about an organization's communications—and communication audits, which include focus groups and surveys with stakeholders, are an effective way to test and gather information and feedback about how your organization communicates with its stakeholders.

Year 1 Estimated Budget:

The first year marketing and communication budget based on marketing and communication activities identified in Year 1. This includes costs for things like a mass emailing system, new website development, printing costs, advertising, labor/consulting costs, etc.

Year 2 Activities:

Outlines the marketing and communication activities that are projected to occur in Year 2.

Year 2 Estimated Budget:

The second year marketing and communication budget is a much more rough estimate than the first year budget, but provides a potential scope of services and budget based on the first year marketing and communication plan, for planning purposes.

Year 3 Activities:

Outlines the marketing and communication activities that are projected to occur in Year 3.

Year 3 Estimated Budget:

The third year marketing budget will be a fairly rough estimate in comparison to the first and second year budgets, but provides a potential scope of activities and budget based on the first and second year marketing and communication activities, for planning purposes.

V. Conclusion

The conclusion is a brief summary of the marketing and communication plan and intended outcomes.