

Campaign Action Plan

This is a campaign action plan outline. It assumes that the plan is being created for the execution of a marketing / fundraising campaign for an entire organization or division, although tactics for individual programs or services may form part of the plan.

The template can be adapted for various types of campaigns however, you should conduct the same analysis each time: i.e. a SWOT, value proposition, strategy and tactics for each product. The more you do it the faster you will get. Build good habits.

Executive Summary

The executive summary is an overview of the entire plan, normally completed after the remainder of the plan has been written. It is a concise summary of where the nonprofit is heading. It is used to highlight the more important aspects of the plan to those who may not read all of the detail contained in the various sections.

Key Assumptions

This should contain any assumptions you have made in compiling the plan and data. It highlights the fact that if a key assumption is incorrect, it may affect the effectiveness of the strategies and tactics. It may also mean the plan has to be reviewed if assumptions are proven to be incorrect.

Background

This section should contain:

1. Organization overview (what does the org do, what programs or services does it offer, revenue, any relevant background information)
2. Vision and mission
3. Nonprofit objectives/goals
4. Strategies (what are the key strategies the organization will follow)
5. Previous marketing history (what major initiatives have we conducted in the past two years? Were they successful?)

Situation/Environmental Analysis

This section should contain the following sections:

1. External (industry, economic, political, competitive, etc.)
2. Internal (programs, services, processes, price, distribution)
3. SWOT

This should be a broad outline of all known information about internal and external factors. A SWOT can be used to summarize the key strengths, weaknesses, threats and opportunities of the organization overall (not of the marketing strategies and tactics).

The section should cover how large the market (actionable donors and prospects) is, its current status (strong, weak, saturated, growing, declining) and recent trends.

Key Dependencies / Interdependencies / Issues

Briefly outline any key dependencies or interdependencies that may affect the nonprofit or marketing activities. These will also provide parameters for planning activities

Marketing Objectives

The objectives are your goals over the next period. They should be precise and preferably measurable. For example:

1. Achieve 10% growth in overall revenue in 2016
2. To increase net revenue by 15% in 2016
3. To achieve brand recognition of 25% unaided recall in key stakeholder audiences by the end of the year

If it is inappropriate or not feasible to develop specific and measurable objectives, then general objectives may be noted.

Value Proposition

Why will people invest in your organization? Are you offering something different or the same as competitors? What differentiates you from others with the same or very similar programs or services? This needs to be brief and to the point – it is sometimes referred to as the “elevator pitch” (the one-minute description everyone on your staff should know that would entice someone to donate or support). The underlying message in this proposition will need to be included (in some form) in many of your marketing activities and it is very useful to lock in the messaging in this planning phase.

Target Markets

Based on the market trends and profiles of your organization and competitors, who is your key stakeholder audience? What market represents the best chance for success? Where are the opportunities?

Marketing Strategy

What are the marketing strategies to support the organizational objectives and strategies outlined in your organization’s strategic plan and also to achieve your marketing objectives? For example:

1. Focus on key channel members
2. Enable partners
3. Drive brand awareness to all target markets/one key target market.

Marketing Tactics

What are the marketing tactics to support each marketing strategy and achieve the marketing objectives?

1. Advertising (online, print, TV, radio, outdoor, other) Website
2. Newsletters
3. Direct mails/electronic direct mails Events
4. Emails Sales tools
5. Social media

Marketing and Communications Strategy Matrix

Create a matrix which notes each strategy, identifies individual objectives for that strategy and lists tactics to support the tactics.

Objective	To achieve brand recognition of 25% unaided recall in key stakeholder audiences by the end of the year.
Strategy	Drive brand awareness in the nonprofit category
Tactics	<ol style="list-style-type: none"> 1. PSA campaign 2. Direct mail 3. Targeted Facebook promotion 4. Microsite/landing page to support advertising / messaging 5. Etc.

Schedule of Tactics, Roles and Responsibilities

Create a table of tactics, roles and responsibilities (and estimate budget if possible)

Advertising campaign	Jan	Feb	Mar	Owner	Budget
Direct mail	X	X	X	John	\$2,000
Facebook		X		Judy	\$1,000
Microsite	X		X	Judy	\$3,000
				Total	\$10,000

Measurement of Outcomes

All strategies, if not all tactics, should identify a success measurement that is agreed by key relevant parties. If cost prohibits a sophisticated measurement i.e. advertisement recognition recall, then relevant parties should agree the tactic is deemed successful based on the client’s acceptance of the output.

**We consolidated this cheat sheet from our experience running nonprofits, corporate partners, and from open sources on the internet.*