

Worksheet for Creating an Annual Nonprofit Marketing Plan

1. **Set your goal(s):** What goals do you seek to achieve next year that will help you accomplish your mission?
 - Your goals should be broadly defined and reflect your organization's overall vision and needs. For example:
 - Provide more services for families with autistic children
 - Become more financially solvent
 - Attract a broader range of age groups
 - List your top three goals for the coming year. (If you have a strategic plan, use the goals from your plan.)
 - Goal 1:

 - Goal 2:

 - Goal 3:
2. **Define your objective(s):** How will you achieve your goals? Set objectives that are **Specific, Measurable, Attainable, Relevant, and Time-specific (SMART)**.
 - Examples:
 - Run support groups for 25 families
 - Raise an additional \$100k in donations
 - Recruit at least 100 new members under age 35
 - List 1-3 objectives for each of your goals.
 - Objectives for Goal 1:

- Objectives for Goal 2:

- Objectives for Goal 3:

3. Select your target audience(s): Which groups or types of people can help you achieve your objectives? What does your goal mean to them?

- How can you identify and reach people in each target audience? Do they live in a certain zip code or neighborhood? Do their children attend the same school? Do they shop at farmers markets? Do they use Facebook? What are their beliefs and values? What are their motivations, needs, concerns?
- List the primary audience for each of your goals/objectives.
 - Audience for Goal 1:
 - Audience for Goal 2:
 - Audience for Goal 3:

4. Choose your strategies. State WHAT you will specifically do to achieve each goal.

- Examples:
 - Improve email open rates
 - Recruit social media ambassadors
 - Attract more online donors
- List strategies for each of your goals/objectives/audiences:
 - Strategy(ies) for Goal 1:
 - Strategy(ies) for Goal 2:

- Strategy(ies) for Goal 3:

5. Choose your tactics. Tactics describe HOW you will implement that strategy. They should include the specific tools (web content, print materials, phone calls, presentations, events) and channels (YouTube, Google AdGrants, postcards, emails) you will use to apply that tactic.

- Keep it simple. Choose tactics that build on and reinforce other tactics.
- Tie your tactics to your end goal. Getting a lot of Facebook Likes is great, but how will it help you achieve your goal?
- Examples:
 - Test email subject lines and content to improve your email open rates.
 - Identify the people to ask to become your social media ambassadors by looking through your Twitter followers for active supporters with a large Twitter following.
 - Post and promote short videos about your nonprofit to attract more potential online donors.
- List tactics for each of your goals/objectives/audiences/strategies:
 - Tactics for Goal 1:
 - Tactics for Goal 2:
 - Tactics for Goal 3:

6. Craft your messages: Craft 1-3 key messages that can persuade your target audience to think, feel or do something that will help you achieve your goals. What channels (website, print, presentations, social media, customer service) will you use to demonstrate or convey your key messages?

- A good message is simple, clear, and persuasive: “Friends Don’t Let Friends Drive Drunk.” Unless you’re creating an advertising campaign, you probably don’t need the perfect slogan. Hone your messages to be short and catchy, but don’t get bogged down in wordsmithing.
- Choose the right messenger(s). You or your organization won’t always be the best spokesperson to convey your messages to your target audiences. The best messenger may be someone in your target audience’s peer group (e.g. another parent), a celebrity chef, a farmer, a sports figure, or a child. Decide which type of person would have the most credibility, and enlist their help.
- List Messages for each of your goals/objectives/audiences/strategies/tactics:
 - Messages for Goal 1:

- Messages for Goal 2:

- Messages for Goal 3:

7. Set your timeline, budget and responsibilities.

- **Calendar of activities**
 - What needs to happen first?
 - What needs to happen daily, weekly, monthly, quarterly, annually?
- **Budget**
 - How much time, money and resources will you allocate to each task?
 - How will you keep track of the budget to make sure you're not overspending?
- **Tasks**
 - Who will be responsible for each task?
 - What type of training or supervision will they need? Who will provide it?

8. Decide how and what you will measure.

- How will you track or record your activities and results (e.g. on paper, in a database, on video)? What written or digital forms or software will you need?
- How will you measure your impact? Through surveys or tests? Focus groups? Anecdotes? Specific behavior changes? Decide what you will do before you implement your plan.
- Give everyone on your team the same tools and measurement criteria for tracking.
- Implement your plan: Carry out your planned activities. Record your activities and decisions as you go.
- Adjust your plan as needed.
- Evaluate your results: Did you achieve your goals? What will you do next time? Reflect and celebrate!