

# Marketing Plan Guide for Centers for Independent Living

## 1. Goals—What you want to accomplish

What are your CIL's top 1-3 goals and how can marketing help you achieve them?

- Organizational Goal Example:

Advocacy: Improve affordable, accessible integrated housing

- Marketing Goals:

Build awareness of lack of housing/video library of stories, Newsjack one story in mainstream media, place 2 videos on website and You Tube and promote on social media

## 2. Measurement—Staying on track

What are 3-5 concrete, specific and measureable steps to complete on the road to achieve your marketing goals?

- Examples:
  - Partner with AAA and Healthcare for Homeless to promote advocacy campaign to save current Medicaid spending levels.
  - Build 2-4 more partnerships
  - Increase number of participants on ILPs
  - Increase I&R requests

- Answer these questions about the steps you have listed.

1. What is working best?
2. What targets or segments of the community are engaged and what segments do you need to engage differently
3. What content works best for your base?
4. What messaging generates response and what fails to motivate?

- Examples

- Meeting attendance
- Incoming inquiries

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- Website usage analytics (most and least visited site pages, key search words)
- Online survey results, focus groups, other audience research
- Change in volume of incoming inquiries from each source (website, social pages, volunteer referral, partner agency referral)

### **3. Situation Analysis – Conditions inside and outside of your CIL**

Key Questions: What is the environment in which you work? What are the perspectives of current and prospective audiences? You can assess this in various ways.

1. What policies, practices or other factors could help or hurt your marketing success?
2. What do other organizations provide in terms of content, programs, and resources and how successful are they?
3. What does your audience think about your CIL and its work? What do they think of the issues that you work on?
4. What current marketing work is succeeding and what needs to change and how?
5. What are the perceptions, hopes, ideas, and concern of staff and leadership in relation to your CIL's marketing agenda?

### **4. Target audience and segments**

Key Questions: Who are the one to three top audience groups you need to engage to meet your communications objectives and what do you need them to do? How do those audiences break into segments (that share perspectives, habits, desires)? What are the wants, habits, and preferences of each segment and how do you connect with them? (Note: You cannot engage everyone, so narrow efforts to key audience segments and focus on engaging well.)

- Examples:
  - Target audience: County residents with disabilities—build understanding about independent living (IL) philosophy and benefits of peer counseling and individual advocacy
    - Segments: students with disabilities, Medicaid recipients with disabilities
  - Target Audience: Social service professionals--build understanding of IL philosophy and create mutual referral relationships

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- Target Audience: Funders—Create understanding concerning uniqueness of IL approach to disability.
- Segments: Regional funders, social program interests, employment readiness interests.

## **5. Calls to Action—What you want your target audiences to do**

Key Question: What specifically do you want to elicit from target audiences?

- Examples:
  - Attend community meeting
  - Become CIL participants
  - Participate in system advocacy effort
  - Visit website, subscribe to e-news

## **6. Framing the Message—Benefit exchange and barriers to call to action**

Benefit Exchange

Key Question: Why should your target audience care? What is in it for them?

- Example: ILP's involve peer support for moving forward in their lives and benefits counseling.
  - receive targeted information regarding access and disability rights,
  - participants achieve sense of belonging as they become part of the CIL community.
  - Social service professionals are overwhelmed and CIL services can relieve some of the burden

Barriers

Key Question: What challenges do you face in motivating the action? What is likely to be difficult?

- Examples: Some people with disabilities do not want to identify as disabled
  - social service professionals have many groups and individuals competing for time and attention
  - funders have prejudices about disability that are similar to those held by the general population

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## **7. Best Strategies—The best ways to achieve your marketing goals**

Key Question: Given the target audience groups that you need to engage and the actions you want to elicit, what are the best ways to motivate them?

- Examples: Build your CIL network: Nurture relationships with relevant community groups like AAA's, Chamber of Commerce, Lions Club, City Club, etc.
  - Message Development: Consistent messaging to your base in mainstream and social media. Messaging should clarify purpose, engage and connect with your chosen audiences. Consistent, memorable messaging helps your base keep your CIL in the forefront of their minds. Messaging should reinforce your relevance and spread the word about your work.

## **8. Tactics—How can your CIL bring your strategies to life?**

Key Question: How to connect with your target audience via these strategies?

- Examples:
  - Write the message platform—use mission, taglines, talking points; train staff and board on messaging (every human contact any staff or board member has is a marketing opportunity); develop style guide and launch
  - Develop PDF for staff and volunteer messengers to use to make decisions on messaging and the “look and feel” of communications
  - Write one page flyer to recruit participants; make less than 3 minute video for recruitment, do the same for potential partner organizations
  - Develop follow up plan for follow up with participant and partner contacts

## **9. Resources—What's needed to implement?**

Roles and Responsibilities

Key Questions:

1. Who does what task?
2. How will you use existing staff? Do you need new staff? Will you contract out and if so, which tasks? How to use board members and volunteers, other partners (social capital)?
3. How many hours per week will tasks take?

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#### 4. What additional training is needed for skill building and for whom?

#### Budget

Key Question: What will this cost?

- Begin planning process with a ballpark budget figure so you can plan realistically.
- Your goal is to understand what brings the greatest return on investment (ROI) and to track the budget over the coming year
- These budget/ROI findings inform next year's marketing budget

#### **10. Step by step work plan—Begin with 90 days and extend to six months**

Key Question: How to roll out your marketing program. What are the immediate steps to take once you have an approved marketing plan?

- Elements: List each discrete task that needs to be done, who is assigned the task, start date and deadlines

Note: This plan was adapted from the non-profit marketing plan template by Nancy Schwartz. Her template and additional material can be found at [www.nancyschwartz.com](http://www.nancyschwartz.com) Nancy E. Schwartz helps nonprofits succeed through effective marketing. Nancy and her team provide marketing planning and implementation services to nonprofit organizations and foundations nationwide. She is the publisher of the Getting Attention e-update and blog. For more nonprofit marketing guidance like this, subscribe to her e-update at <http://gettingattention.org/nonprofit-marketing/subscribe-newsletter.html>

See more at: <http://gettingattention.org/articles/69/planning-budgets/nonprofit-marketing-plan-template.html#sthash.GPMW0FyE.dpuf>

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