



# *marketing for* **good**

*tool kit for not-for-profit marketers*

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AUSTRALIAN  
MARKETING  
INSTITUTE



NOT FOR  
PROFIT

# marketing for good

## *Vision*

Enhancing and professionalising not-for-profit marketing practices for the ultimate benefit of the community.

## *Purpose*

The Marketing for Good project seeks to promote professional excellence and enhance the success of not-for-profit marketers through development of professional guidelines.

## *Tool Kit Overview*



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# Introduction

*Many not-for-profit organisations are far from reaching their potential through marketing.*

## Marketing for Good

'Marketing for Good' is a project established through the Australian Marketing Institute by a collective of not-for-profit marketers based primarily in Victoria. The vision for the project was to enhance not-for-profit marketing practices for the ultimate benefit of the community and the environment (the idea being that better marketing would lead to better outcomes and bigger impact for not-for-profit organisations). The project sought to define and promote guidelines of professional excellence.

The University of Wollongong conducted research into not-for-profit marketing across the United States, the UK and Australia in 2009. The research, titled *Marketing in non-profit organisations: an international perspective*, found that:

### **Not-for-profit marketers often don't have formal training**

Only one fifth of marketing staff in the organisations surveyed were formally trained in marketing (using the broadest possible definition of 'training' including on the job training).

### **Not-for-profit marketers tend to take an 'organisation-centred' approach, as opposed to a strategic 'customer-centred' approach**

According to the study, some not-for-profit marketing managers demonstrate a limited understanding of the principles of marketing and largely focus their efforts on promotional activities. Instead of embracing the marketing concept and beginning the marketing process by investigating what the customer needs and wants, not-for-profit organisations have an 'organisation-centred' mindset and falsely believe that their product is needed by the market. When asked about the responsibilities required of them, only 10% cited marketing strategy as a priority.

The closing remarks in the research note that many not-for-profit organisations are far from reaching their potential through marketing, and there is significant opportunity for improvement through the adoption of a customer-centred, market-oriented approach.

This Tool Kit is designed to address that gap. It is aimed primarily at not-for-profit marketers who are new to the industry, who have limited marketing experience or who do not have formal training in marketing, as well as those who are looking for some external guidance or support.

While the fundamental principles of marketing are the same for any organisation, the context in which those principles are applied can alter their application. There are two main types of not-for-profit organisations - those that deliver services, and those that exist to generate social/behaviour/policy change through advocacy. Some not-for-profit organisations will do both.

*This Tool Kit is designed to provide practical guidelines for conducting strategic and customer-centred marketing programs in a not-for-profit context.*

Some challenges that can be particularly unique to not-for-profit marketers are:

- Objectives are ultimately non-financial (hence more difficult to measure).
- Multiple stakeholders with competing priorities.
- A competitive/collaborative relationship with other organisations in the field.
- The need to balance financial pressures and mission.
- Often the four Ps aren't under the marketer's control (often the product cannot be changed, the price is generally voluntary and distribution channel decisions can rarely be made).
- Limited resources (both human and financial).
- Potential reputation loss associated with the perception that public funds are being 'wasted' on marketing activity as opposed to delivering on mission.

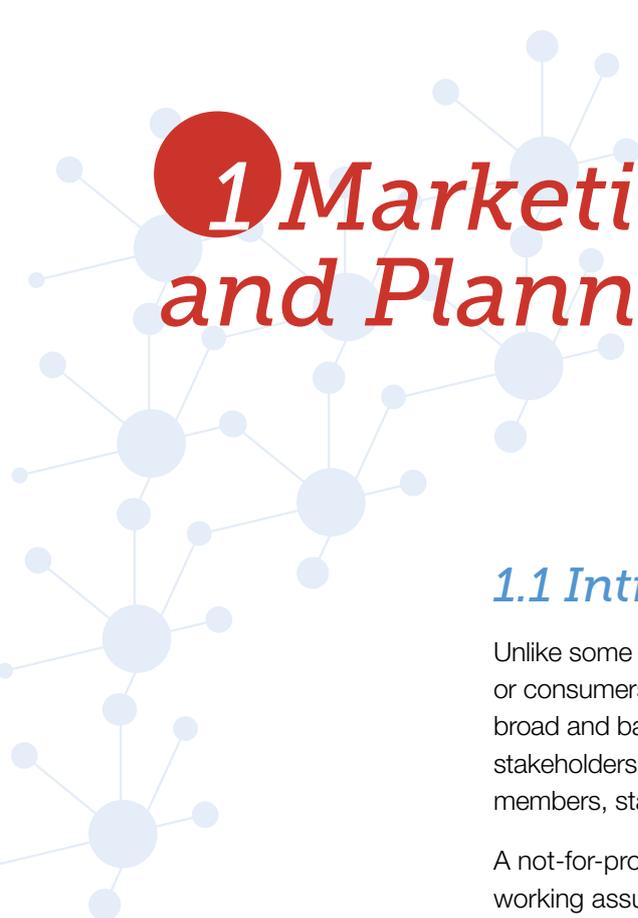
The purpose of this Tool Kit is not however, to define the differences between for-profit and not-for-profit marketing (that in itself is a much larger project), but rather to acknowledge that such distinctions exist and to provide practical guidance specifically geared to not-for-profit marketers that may have limited experience/training and who are looking for support.

The kit is designed to provide practical guidelines for conducting strategic and customer-centred marketing programs in a not-for-profit context (shifting from a focus on tactics to strategies). It is designed to be a quick reference point for basic marketing decisions in four key areas (all of which are crucial elements of a strategic marketing program):

- Marketing strategy.
- Market research.
- Campaign implementation and execution.
- Marketing metrics and measurement.

The Tool Kit is not designed to be a substitute for other formal marketing training or qualifications, but rather to provide general guidance, and highlight where different considerations and approaches may be required for not-for-profit marketers to be successful.

The advice contained within this document is endorsed by the Australian Marketing Institute, but is a guideline only, and should be applied taking into account your organisation's context.



# 1 Marketing Strategy and Planning

## 1.1 Introduction

Unlike some for-profit businesses, whose focus is predominantly on their customers or consumers of their products, not-for-profit organisations are required to take a broad and balanced view of marketing opportunities, taking into account multiple stakeholders including donors, employees, volunteers, government, funding bodies, members, staff, clients, families of clients and regulators.

A not-for-profit marketing strategy and plan should provide a detailed set of working assumptions, strategic principles and measurable goals that identify the type of ideas and engagement mechanisms that will most effectively influence people's thoughts and feelings, and spell out how this influence will work to support organisational success.

## 1.2 Getting Started

*Start by determining what you need in your marketing strategy and prepare a basic campaign template.*

Marketing plans can differ in different organisations, however generally include some common elements. Start by determining what you need in your marketing strategy (considering the organisation's overarching marketing needs, as well as those of any internal stakeholders) and prepare a basic campaign template.

This could include:

- Executive summary.
- Introduction.
- Description of the heritage, purpose, structure and funding of the organisation.
- Internal organisational analysis (key internal challenges).
- Environmental analysis - (political, environmental, social, technological, legal).
- Competitor analysis.
- SWOT (strengths weaknesses opportunities and threats).
- Campaign planning assumptions (relating to competitors or the internal or external environment).
- Client needs (when providing services).
- Customer/donor analysis (market segmentation – primary and secondary markets).
- Marketing goals/objectives (including client and donor segment specific goals if you're seeking to influence multiple audiences) – aim to include behavioural goals in this section.
- Target market needs and motivations.
- Key messages (communication proposition).
- Tactics, timing and accountabilities, responsibilities, who is to be consulted and informed.
- Budget.

See Section 1 Appendix 2 for an example campaign template.

Whether your organisation is big or small, with or without access to strategic support from outside marketing specialists, you should always develop your marketing strategy through a disciplined process. Your strategy may be very detailed, or it could be one or two pages long.

Not-for-profits with smaller teams and budgets can sometimes skip this strategic process and jump straight into implementing tactics. Don't. Aim to fill in content in all the above headings, even if only in dot point form.

*Good marketing strategy starts with the desired organisational outcomes and works back from there.*

### 1.2.1 Setting Goals

If 'not-for-profit', then 'for what'? Like any other organisation a not-for-profit needs to define its core purpose in a way that can be used to measure organisational success. Unlike for-profits, a not-for-profit cannot solely define success in terms of financial benefits for shareholders. One of the most common problems in not-for-profit marketing strategy planning is a lack of clearly stated or measurably defined organisational goals.

It is the job for marketing strategy to define how marketing will support the achievement of organisational goals.

Good marketing strategy starts with the desired organisational outcomes and works back from there to determine how these might be influenced with effective marketing engagement. That is often one of the first challenges for not-for-profit marketers – organisational purpose is not always clear. If your organisation's goals haven't been clearly defined, work with the executive team one on one to understand as much as possible about the desired direction – invest in that process early, to avoid taking your marketing strategy in the wrong direction.

#### **Example marketing goals**

*Example 1 - NFP aged care provider in today's regulatory environment*

Role of marketing: To gain community advocacy and support because we are a professional caring service provider that strives to optimise the spiritual and psychological wellbeing of those in our care, as well as supporting our clients' physical health and safety.

*Example 2 – Large overseas aid organisation focused on children*

Role of marketing: To educate and motivate all Australians to elicit their financial, social and political support to help ensure that all children get the chance to grow up safe, free from preventable disease and hunger and receive a basic education.

### 1.2.3 Defining your Audience

*Think about definitions that encapsulate the link between the organisation's goals and the target segment behaviour and mind-set.*

There are two ways to segment your audience:

#### **Broad audience 'type' segments:**

e.g. prospective/existing clients, donors, employees, board etc

#### **Narrow target audience segments:**

- broad segment sub-types  
e.g. individual donors, corporate donors
- motivationally defined groups  
e.g. spiritually motivated, ethically motivated
- behaviourally defined groups  
e.g. one-off donors, on-going donors
- demographically defined groups  
e.g. female donors over age 50
- geographically defined groups  
e.g. donors that live in a particular region

Broadly defined 'type' segments are useful as a way to define the overall potential and priorities for marketing investment. More narrowly defined segments are important for developing segment specific messages and creative insights.

Aim to define your audiences by 'what's in it for me?'. Don't start with demographic definitions – these are something you should only define later at the media selection stage. Think instead about definitions that encapsulate the link between the organisation's goals and the target segment behaviour and mind-set.

#### **Deciding on your primary segment**

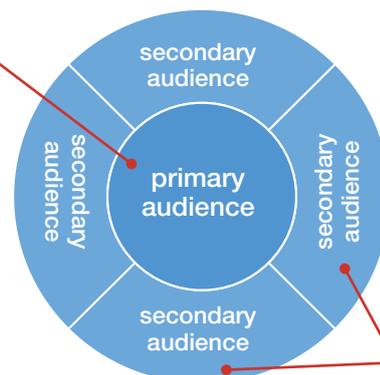
Who needs to know and love your brand? One of the challenges in a not-for-profit context is that there are generally a multitude of audiences that fall into this category. This goes well beyond one 'customer' group and includes clients, donors, members, funding bodies, board, staff and other community organisations to name a few. However many distinct market segments your organisation's success may depend upon; you must always decide on a narrowly defined primary target segment.

This is the only way to arrive at a sufficiently powerful primary audience insight and clearly differentiated value proposition, both of which are essential ingredients for maximising the creative power of your marketing campaign.

Doing this ensures that you will not fail by attempting to be 'all things to all people', but will succeed by telling a focussed and consistent story in different ways to different people.

*However many distinct market segments your organisation's success may depend upon; you must always decide on a narrowly defined primary target segment.*

Primary focus of insight and value proposition



Secondary 'take' on value proposition relative to primary target

### 1.2.3 Defining Audience Needs and Wants

*The most vital step in marketing strategy is to understand the motivations and needs that underlie the behaviour you wish to influence.*

The most vital step in marketing strategy development is to understand and agree on the core needs and specific motivations that underlie the behaviours you wish to influence.

Why do people donate their hard earned cash? Why do highly paid professionals give up their time to serve as volunteers? Why do talented employees stick with you through thick and thin despite tough working conditions and ordinary wages? Why do large corporations sponsor major events and infrastructure investments?

The answers to these sorts of questions are essential to any effective marketing strategy, because they reveal how you might encourage more of the sort of behaviour that matters most to your organisation's success.

Your market research, however limited, (see section two) should provide you with the insights that will allow you to answer these questions and determine the underlying motivators for your audience's actions. If you require additional evidence or guidance, you could seek information from your frontline staff or look for case studies in similar industries.

### 1.2.4 Developing a Value Proposition and Key Messages

*The value proposition should work across all of your segments .*

The value proposition is a succinct statement that spells out 'what's in it for me?' from the viewpoint of the primary target segment. It should provide a highly engaging way to explain what you are selling, in terms of how you promise to satisfy the target audience's underlying emotional needs.

The value proposition should work across all of your segments – even though you may have come to it via a very narrow consideration of a single segment's needs and motivations.

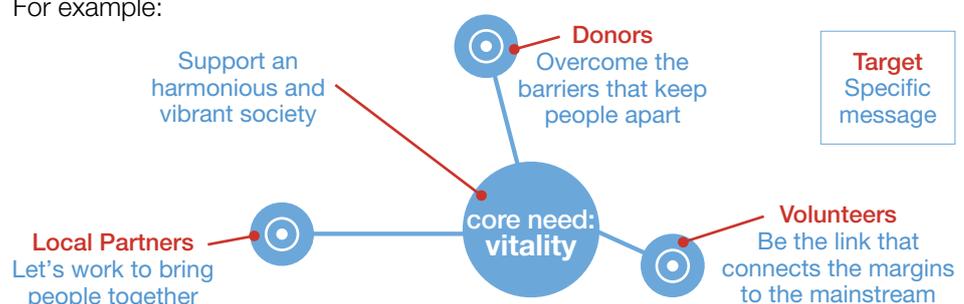
For example, consider the following translation of a central value proposition into a series of audience-specific value propositions.

Your aim should be to arrive at a single starting point from which you can express the same basic idea in many different ways to distinct segments, according to their own specific motivations – but always tapping into the same underlying need.

#### Segment-specific message framework

Your practical challenge is to translate one core proposition into audience-specific messages. Integrity, consistency and alignment are essential to maximise the overall impact of the campaign idea as a way to engage with your target audience more powerfully. As an integral part of your creative brief this framework should serve as a structure around which to develop a single-minded creative idea.

For example:



## 1.2.5 Engaging an Agency

*Choosing the right agencies and other suppliers means selecting those who are truly committed to helping you achieve your organisational goals 'for good'.*

If you have budget available, consider engaging an agency (or multiple agencies) to assist with the marketing planning process.

Not-for-profit marketers operating with very tight budgets often look for partners who are prepared to work for less than full commercial rates. Ask yourself why they might do this, and you soon realise that the answer is not always about working 'for good'. Choosing the right agencies and other suppliers means selecting those who are truly committed to helping you achieve your organisational goals 'for good' as a way to realise their own objectives, whether that may be reputational enhancement, employee satisfaction and/or business growth.

### **When they say they really want to help, but what they're really offering is...**

#### **Creative agencies**

Can be attracted to 'pro bono' as a way to win awards that boost their creative profile by executing ideas that appeal to award judges without worrying too much about whether they will appeal to your target market.

**Ask them about** their commitment to winning effectiveness awards.

#### **Media agencies**

Can look to make profit on a lower margin buy by taking it easy in terms of the depth or sophistication of their analysis, or by passing off the 'freebies' they are given as good value options with little regard for their true effectiveness.

**Ask them how** they plan to maximise the impact of your media spend by maximising the relevance of your media placement, and who they can attract that may want to sponsor your event/campaign.

#### **PR and event agencies**

Can be looking to push their own 'pet' projects without too much concern about their relevance to your cause, or may be looking to 'borrow' the credibility of your 'feel good' brand to create opportunities for others to profit.

**Ask them how** they will maximise the relevance of their media engagement and event management.

#### **Strategy consultants**

Can be long on theories that they use to promote themselves, but short on practice and evidence of real-world effectiveness.

**Ask them to** show you a relevant case study that demonstrates the power of their strategic approach and how they have delivered a return in terms of social outcomes.

#### **Value for money**

If you are planning to engage an agency, finding the best value for money means being prepared to pay something for what you receive. The budget you commit provides you with the right to demand control over the marketing agenda and project timeline and outputs. It is always however reasonable to ask for a not-for-profit discount of between 20%-50%. Always try and find a supplier that is aligned with your purpose before you discuss rates – its much more helpful if you're both on the same page to begin with about the work and it's impact.

*The budget you commit to an agency provides you with the right to control the agenda, timeline and outputs.*

## Working in harmony

Maintaining overall control while seeking strategic advice can be a challenge, particularly when agencies differ in terms of their strategic approaches. Remember that it is ultimately your strategy and thus your responsibility to make sound judgements based on the balance of strategic advice. To ensure that you are working with strategic team players ask each how they will work together in line with your overall objective.

*Developing a network of marketing professionals you can bounce ideas off is highly valuable for a not-for-profit marketer.*

## What if I can't afford an agency?

If you don't have the budget to engage an agency, consider seeking some external feedback on your strategy as you develop it. This could be from industry peers or marketing professionals from other industries. Developing a network of marketing professionals you can bounce ideas off is highly valuable for a not-for-profit marketer who can't afford to buy external advice. If marketing networks don't currently exist in your industry, consider establishing one.

Before you consider engaging an agency or review your budget to determine whether you can or can't afford one, start with a simple skills analysis of your marketing team. Where are your skill gaps, and where do you have in-house expertise? This will help determine where you need to seek external support (in the form of an agency, or advice from an industry network). For example, you may have the skills and acumen to run PR and media in-house, however media buying is often a more specialist skill so you may wish to seek external support for that component.

## 1.3 Budgeting

Setting the marketing strategy budget can be challenging for any organisation, and particularly so for a not-for-profit. The solution lies in careful assessment of the opportunities and opportunity costs associated with the investment – what up-side can marketing investment achieve, and what down-side might you expect if you don't invest in marketing?

Marketing investment should either create value in the form of reputational goodwill, which will affect the way people behave in the future, or by providing an immediate stimulus to action, which typically leverages the goodwill that you have already built up through investment in your brand or product reputation.

*If you have a large donor base funding your activities, they are likely to question any significant spend on marketing activity. Make sure you keep this in balance.*

It's also important to consider the impact that marketing activity can have on your reputation from a donor's perspective. If you have a large donor base funding your activities, they are likely to question any significant spend on marketing activity. Make sure you keep this in balance.

Setting an appropriate marketing budget will also depend on the opportunities and risks that your organisation is facing over the coming 1-3 years. You need to invest more in marketing when:

- Your regulatory, operating or competitive environment is changing in ways that either open up opportunities or create threats.
- Your reputational goodwill is currently low and you need to increase it in order to achieve desired levels of response to your 'call to action' campaigns.
- You need to generate greater than usual levels of response in the form of donations, volunteering, job applications or whatever is important to organisational success.

### 1.3.1 Investing in Reputational Goodwill (Brand Equity)

Understanding and predicting the link between marketing investment and reputational goodwill remains one of the most controversial and difficult aspects of marketing science, however there can be no doubt that they are linked. It is useful to consider the metaphor of a jet aircraft. You need to burn a lot of fuel to gain altitude, but once it has reached its desired height it takes far less to remain there. Stop burning fuel altogether and you begin to lose altitude at first slowly, and then more quickly. Good rules of thumb for determining an appropriate level of investment in brand equity building include:

- Look to a brand that has achieved the sort of reputation profile that you are aspiring to, and find out what they have spent to do so (historical estimates of media spends are available via media agencies). This will provide an indication of the spend you need.
- Look at the value of the incremental revenue stream which might be generated with marketing, or which may be at risk without it, and estimate what this represents to the business over the coming three year period. It may be necessary to invest a substantial proportion of this value to ensure that you maximise your revenue over this period.

### 1.3.2 Investing in Generating an Immediate Response (Call-to-Action)

*The aim of marketing strategy should be to maximise both the degree of reputational leverage that you exert, and the creative power of your engagement.*

Understanding and predicting the effects in call-to-action marketing investment can be difficult because they depend on the amount of goodwill that already exists to be leveraged, as well as the power of your creative strategy. The aim of marketing strategy should be to maximise both the degree of reputational leverage that you exert, and the creative power of your engagement. Some good rules of thumb to apply in setting call to action budgets include:

- Calculate what it will cost to reach enough of your target audience with your call to action at least three times to generate the desired amount of response. Note that you will need to base this estimate on an assumption about the proportion of those you reach 3+ times that are likely to respond. Also note that you need to allow at least 10% on top of your media or event budget for creative development and production.
- Look at the last time you ran a highly effective call to action campaign and determine how much response that investment generated, and use that as a guide.

### 1.3.3 Developing the Case for Support

If you are developing a marketing campaign for the first time, or are seeking an increase in investment in marketing, a business case may be required.

The primary challenge for NFP marketing strategy is to establish the link between behavioural influence and organisational goals. This link needs to be considered in terms of two planning horizons:

**Long term** – overarching organisational purpose in the context of the next 3-5 years

**Short term** – immediate goals and priorities for the next budgetary period

#### Negative consequences of inaction

A common misunderstanding amongst senior not-for-profit executives is that marketing is all about up-side. In reality, most organisations require constant marketing effort to avoid going backwards in the face of changing target market agendas and the impact of competitive initiatives and activities. To accurately assess the potential for marketing to support organisational success it is vital to consider what might happen if you don't engage the market. To do this you need to anticipate the likely impacts of changing social values, regulatory constraints, competitive initiatives, new technologies, and demographic trends.

#### Dimensions of potential – value and influence

Two dimensions need to be considered when assessing the marketing potential inherent in each of your marketing constituencies or stakeholder groups:

**Potential value** – how much future organisational viability and success depends upon the goodwill and favourable behaviour of this target segment?

**Potential capacity** – the degree to which we can expect effective marketing to create goodwill and influence behaviour amongst this target segment.

For example:

segment	outcome potential	perceptual barriers and/or gaps	potential value	potential capacity
<b>prospective clients</b>	increasing rates of inquiry = lower cost of acquisition	lack of awareness and understanding	low	high
<b>employees</b>	increased retention = lower hiring and admin costs	frustration about lack of clear future direction	high	medium
<b>potential volunteers</b>	increased volunteer inquiry = maximise volunteer hours	lack of awareness and understanding	medium	high

*Most organisations require constant marketing effort to avoid going backwards in the face of changing target market agendas and the impact of competitive initiatives and activities.*

## Ways to express marketing potential

The following list offers a range of general ways to think about the potential for marketing to add value:

- Sustain / increase revenue.
- Contain / reduce costs.
- Sustain / grow brand equity (i.e. reputational goodwill).
- Support year on year growth.
- Sustain / increase competitive ranking.
- Deliver on purpose (for example, if an organisation's purpose is to save water, how much less water is being used?).

## 1.4 Check Lists

### Marketing potential and budget rationale checklist

- Review all potential sources of marketing value (i.e. stakeholder groups).
- Consider and assess the potentially negative consequences of inaction.
- Identify both strategic (3-5 year) and tactical (current year) issues and imperatives.

### Primary audience selection checklist

- Prioritise broad audience types in terms of long term (3-5 year) and short term (1 year) potential value to the organisation. This should help determine who your most important audiences are.
- Define specific target audiences in terms of narrow type, motivation and/or behaviour.
- Select primary and secondary audience segments based on potential value – this could take into account the importance of a particular audience to organisational success, the size of the audience and our ability to influence the behaviour of the audience.

### Audience need and insight checklist

- Review all available research and learning from past experience.
- Assess risk/reward trade-off associated with further research.
- Define the core 'need' met by your brand /offer.
- Define the role your brand/offer plays, relative to others in your sector.
- Define audience-specific insights in a way that clearly links to a desired behavioural outcome – set behavioural goals.

### Value proposition and audience message checklist

- Spell out 'what's in it for me' for your primary audience.
- Translate into segment-relevant propositions for secondary audiences.
- Distil into an over-arching value proposition – what's one message that's relevant to all audiences?
- Ensure that your promise links to a demonstrable truth about your brand/offer – don't promise what you can't deliver.

## 1.5 Top Tips

1. Work through a disciplined process to define the link between business opportunity and marketing strategy.
2. Make explicit assumptions and hypotheses even if they're only based on educated guesswork.
3. Don't talk about yourself, talk about what you can do for your target market (what's in it for me?).

## 1.6 Traps and Pitfalls

*Spending too little time on strategy including market research and analysis creates significant risks and leads to under performance against strategic goals.*

### **Poor strategic analysis**

Whether or not you can afford to work with an agency, it's important to devote a significant proportion of your resources (be they funds for an agency or your own time) to conducting sound strategic analysis, using the guidelines above. Spending too little time or money on good advice or on the right sort of strategic inputs such as marketing research or category analysis creates very significant risks and invariably leads to underperformance against strategic goals. In fact this approach can often lead to substantial wastage of resources spent executing strategies that are poorly informed and misdirected.

### **Confusing marketing strategy with organisational strategy**

One of the most common mistakes made by inexperienced marketers is to confuse marketing strategy with broader organisational objectives, tactics or engagement concepts. It is not the role of marketing strategy to define organisational objectives, but rather to interpret them and support them through separate goals and objectives.

### **Confusing tactics with strategies**

The most common mistake is to pass over true strategy and talk instead about what should be done, which are in fact tactics (e.g. our strategy is to hold a major event). This approach is attractive because it seems to provide a very clear direction for action, yet it is flawed because it provides no basis for assessing whether one tactic (e.g. an event) might be better than another (e.g. a media campaign).

### **Setting objectives that aren't linked to behavioural outcomes**

Another common error is to think about marketing strategy in terms of the values or principles that are important to defining organisational purpose. For example, social justice is an ideal that underpins the 'reason to be' for many not-for-profits, however 'to promote social justice' is not a marketing strategy. The only way to define effective campaign concepts is to start with a marketing objective defined in terms of behavioural outcomes that will support organisational success, then look at the needs and motivations of the target market to understand how these can be engaged to achieve those behavioural outcomes.

## 1.7 Available Tools and Resources

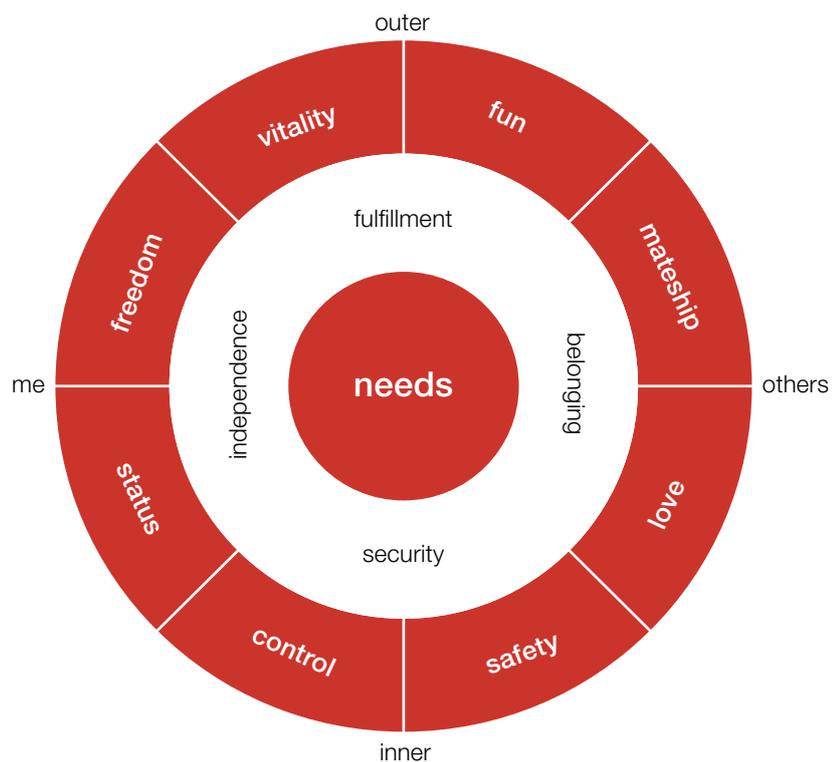
### Simple potential assessment framework

segment	potential outcome	perceptual barriers and/or gaps	potential value	potential influence

### Useful tools for marketing insights

**Maslow's Wheel:** The chart below provides a helpful categorisation of basic human needs that underlie most of our behaviour. It is based on Maslow's hierarchy of needs, but is arranged as a wheel based on whether the need is about gratifying me or others, and whether its satisfaction is experienced outwardly or inwardly. Your aim should be to select one 'core' need as a way to clarify 'what's in it for me?' for your primary target segment.

For example: For affluent professionals looking for a cause to support who want to make a personal contribution to social justice in their own community *Brand X* delivers the need for vitality *in fulfillment* of their outward focussed desire to enjoy life as an engaged member of a harmonious, vital community.



**Brand Archetypes:** Derived from Jung, this tool provides a way to think about the type of brand you need to be to fulfil the target audience’s need. It helps you to push past the category norms (e.g. nurturing altruistic caregiver) to help you recognise the distinctive aspects of your organisation’s behaviour that attract the target audience, and so add a unique brand flavour. What sort of brand are you? What role do you play in the lives of your target market? The following chart suggests some of the archetypes that help to distinguish generically caring organisations.

<b>everyman</b> reliable best friend	<b>lover</b> passionate seducer	<b>jester</b> enigmatic funster
<b>caregiver</b> nurturing altruist	<b>creator</b> innovative risk-taker	<b>ruler</b> effective leader
<b>innocent</b> optimistic purist	<b>explorer</b> adventurous seeker	<b>sage</b> expert advisor
<b>champion</b> competitive winner	<b>outlaw</b> rebellious liberator	<b>magician</b> change master

### Aged Care NFPs



**Caregiver**  
altruistic, selfless,  
compassionate  
nurturer, emphatic,  
supportive,  
generous



**Champion**  
competitive,  
aggressive, winner,  
principled idealist,  
challenges wrongs  
to improve world



**Sage**  
thinker, philosopher,  
reflective, expert,  
advisor, teacher,  
confident, in control,  
credible



**Creator**  
innovative,  
imaginative, artistic,  
experimental, takes  
risks, ambitious, turns  
ideas into reality



Section 1: Appendix 1

# Marketing Campaign Template

Organisational strategic goal

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Marketing goal

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Situation analysis and background

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Target market analysis

<b>Market Segment</b>	<b>Demographics</b> what they look like	<b>Psychographics</b> needs and wants	<b>Behavioural</b> what they do

Key audience insights

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Key messages (value proposition)

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Internal stakeholders to consider/consult

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Risk analysis

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## World Vision Case Study

### World Vision Sponsor Recruitment Campaign, 2000-2003

This case study lies at the extremely large end of the spectrum from large to small scale marketing investments, however it is one which was developed in line with the steps outlined in this document and which clearly demonstrates how important this is to unlocking the potential power of marketing investment.

#### **The role of marketing for organisational success in the mid to longer term**

World Vision is an international federation of nationally incorporated entities whose main focus of operations are based on bilateral contracts to raise funds (support offices) for investment in local area development programs (field offices) that are designed to substantially improve the conditions of life for children living in the world's most socially disadvantaged communities by empowering those communities to provide them with safety, education, nutrition and healthcare. The primary mass marketing model underpinning these contracts is the Child Sponsorship product; however any actions that generate support for developing communities are equally desirable (e.g. lobbying to increase the effectiveness of Ausaid).

As a support office the role of marketing for World Vision Australia (WVA) is to maximise the amount of support that Australians contribute to the wellbeing of the world's most socially disadvantaged children.

#### **The potential value of marketing in terms of the long and short term opportunity (cost)**

In 1998 WVA faced a declining rate of new sponsor acquisition and a growing rate of early cancellations and non-renewals. Having pioneered the Child Sponsorship marketing model in the 60's WVA was now competing with many other organisations with very similar product offerings. They were also seeing the emergence of attitudes amongst the next generation of potential sponsors that reflected a more cynical view of the potential for charitable organisations to ever resolve the problems underlying extreme poverty, and a growing lack of personal engagement with issues outside of our own narrow community or national borders. The net result was increasing costs of fundraising as a proportion of overall funds raised.

The long term marketing opportunity was to influence more Australians to offer their support to improve the wellbeing of the world's most socially disadvantaged children by convincing them that it is possible to affectively overcome the underlying causes of poverty, and that their own personal contributions would truly benefit their own life as well as that of a child and community in need. The 'stretch' goal set by WVA CEO Lynn Arnold was to engage half of all Australians to support World Vision in this effort.

The short term opportunity was to establish a more cost-effective sponsor recruitment marketing campaign that would increase the total amount of recurrent revenues generated through child sponsorship in FY2000, and drive down the proportion of sponsorship funds invested in sponsor acquisition.



## **Primary target market segments and segment specific marketing objectives**

Analysis of existing sponsors was undertaken to better understand the socio-demographic profile and motivations of the most valuable segment of long-term, committed (3+ year) sponsors. This revealed a strong skew towards highly educated and affluent professionals, with no evidence of religiosity as a key driver of commitment.

The overall segment of 'Givers' was defined in terms of a belief in the potential for Australians to bring about lasting improvement to the lives of children living in the world's poorest countries, combined with a sense of personal commitment to provide support. The long term marketing objective was to increase the proportion of the Australian population who hold these beliefs, and thereby increase the size of the pool of 'Givers' from whom financial support could be cost-effectively gained through call to action campaigns.

Within this broadly defined Giver segment we identified a number of sub-segments whose underlying motivations and beliefs were slightly different, and who thus tended to respond to different types of specific appeals. Three sub-segments were identified as the priority focus for recruitment based on their proven tendency to remain committed for a longer period, and thus deliver higher return on the marketing and CRM investment required to recruit them.

The short term marketing objective was to maximise the number of new sponsors recruited within these high-value segments.

## **Target market needs and motivations that underlie key marketing insights**

Research revealed that Givers in general, and more specifically those who we defined as Humanists, Pragmatists and Believers, were becoming inured to the appalling sight of children's suffering as a motivation to action, and growing increasingly uncertain about the value of child sponsorship as a long-term solution. One key insight was the need to provide clear evidence of the positive effects of sponsorship in the long term, by providing a clearer demonstration of the potential for local communities to take charge of their own children's well being following a period of support from World Vision.

Another core insight was that many sponsors find their own lives to be spiritually enriched by the experience of sponsorship, with very positive outcomes for their own sense of personal and family wellbeing. WVA marketing to date had failed to clearly promote this powerful benefit as a reason why to become and remain a sponsor.

A third type of insight was that Givers in each segment were motivated by a slightly different rational belief. For Humanists, the motivation to give stems mainly from the moral sense of duty to help create a better, more just world for future generations. For Pragmatists, the motivation is more about the moral obligation for more fortunate people to help equip those less fortunate with the knowledge and tools needed to improve their own lives. For Believers, such rational motivations are less important than the desire to feel good about giving another individual the chance to experience happiness. Each of these three distinct mind-sets was used as the basis for crafting sub-segment specific appeals and messages as components of the long term brand and short term (call to action) sponsorship campaigns.

*Three distinct mind-sets were used as the basis for crafting sub-segment specific appeals and messages as components of the long term brand and short term (call to action) sponsorship campaigns.*



The final insight was drawn from a wider sense of what it means to be a 'good Aussie' – namely, to express and display a commitment to giving everyone a fair go in life. The opportunity was to present the plight of people living within extremely disadvantaged communities outside of Australia as being people just like me, with the same hopes and aspirations, but who have been denied a fair go. By doing so, we presented support for World Vision as a good Aussie thing to do.

### **Core brand value proposition and a segment-specific message framework**

#### ***For All Givers***

Support World Vision to give someone just like you a fair go in life

#### ***For Humanists***

Support World Vision to help build a world where everyone gets a fair go in life

#### ***For Pragmatists***

Support World Vision to help provide people with the tools and knowledge they need to win for themselves a fair go in life

#### ***For Believers***

Support World Vision to experience how good it feels to give someone a fair go in life

### **Marketing campaign summary**

The campaign that World Vision ran over the next 4 years was based on the idea of 'What's your world vision?' and suggested that if it you believed that everybody should get a fair go in life, you should go online at World Vision to find out the many ways you can help.

Powerful brand TVCs were created by combining the lyrics of the U2 song 'Haven't found what I'm looking for' in which the underlying message of spiritual hope and faith in the potential for humankind to overcome the injustice of poverty are communicated in a subtle yet emotionally very powerful way, with images of everyday Australians juxtaposed to people struggling to cope with the disadvantages of poverty, and with footage of people using their own words to talk about their personal world visions of fairness and human connectedness.

The goodwill and commitment created by these brand ads were later converted into action through the use of an appeal for 'X thousand sponsors for X thousand children' delivered by the very credible and well known CEOs of World Vision, Lynn Arnold and later Tim Costello.

This was all supported by a heavy presence online, all driving traffic to the World Vision site.

### **Marketing Strategy effectiveness**

The charts overleaf are drawn from a presentation made in 2003 which summarised the results of the first three years of the campaign.

These reveal the long-term effects of the campaign in terms of driving up the number of people whose attitudes reflect a 'Giver' mentality, indicating an overall increase of at least 16% in the proportion of Australians with some potential to become World Vision supporters, up to around 50%.

*The goodwill and commitment created by these brand ads were later converted into action.*



They also provide evidence of the effectiveness of the call to action campaigns, which each year aimed for a higher target and each year actually improved in terms of results achieved relative to those targets.

The annual trend charts show how increasing numbers of new sponsors drove up annual growth rates at the same time as driving down the cost of fundraising as a proportion of total funds raised.

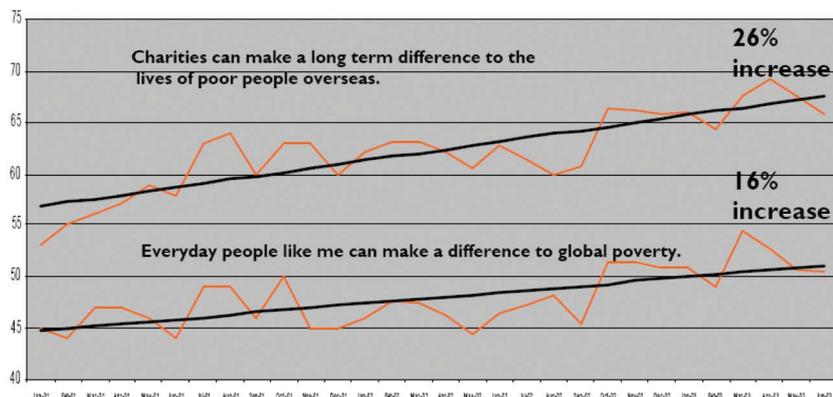
### Call to Action Campaign Results

2000	2001	2002
2000 sponsors in 20 days (October)	5000 sponsors in 29 days (September)	10000 sponsors in 44 days (mid August - end September)
Australian "lucky country" theme	Target and urgency driven	Target and urgency driven
2681 enquiries (1781 fulfillments)	6805 enquiries (5531 fulfillments)	15154 enquiries (12739 fulfillments)

### Campaign Impact on Underlying Attitudes

#### Public Attitude Tracking, January 01 to June 03

Proportion of Adult Australians who agree with the following statements:

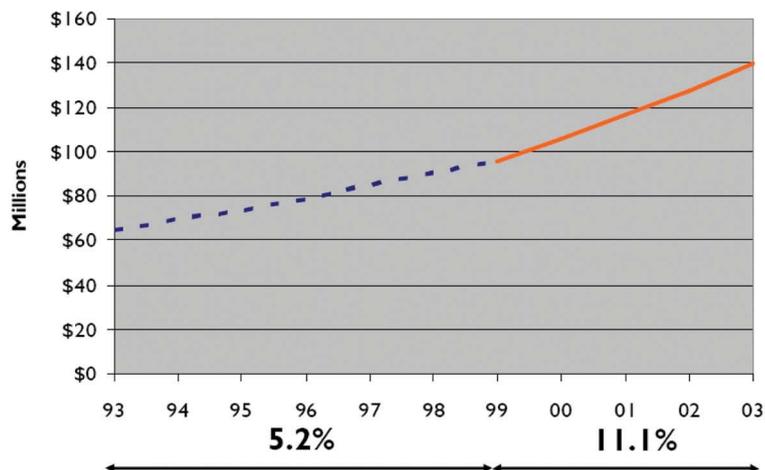


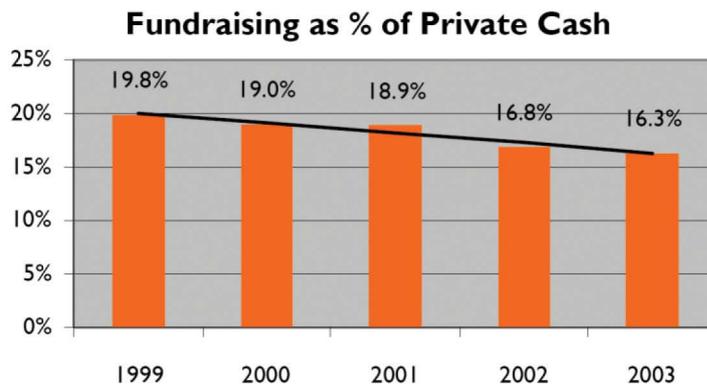
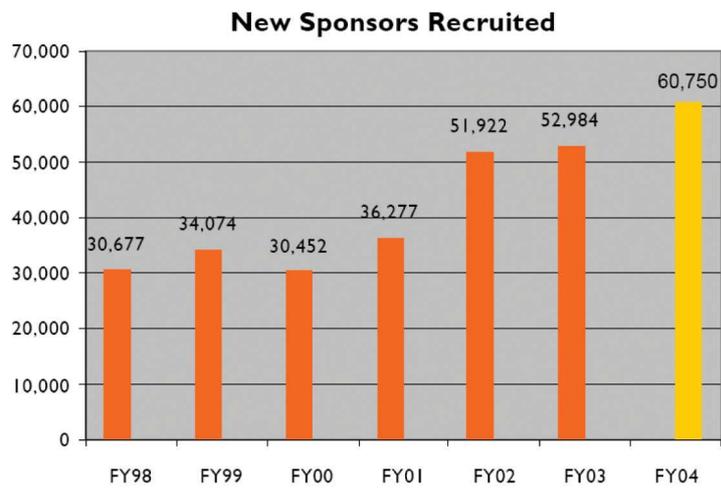
N.B. World Vision is Australia's biggest charity advertiser – and bigger than the next 13 aid agencies put together. We'd like to take some of the credit for this shift in public opinion...

Source: Roy Morgan Omnibus

### World Vision Campaign Results, 2000 - 2003

#### Annual Average Income Growth





## Summary of World Vision Marketing Strategy

Step	Strategic Plan
<b>1 Role of marketing</b>	Educate and motivate Australians to elicit their financial, social and political support to help ensure that all children gain the opportunity to grow up safe, free from preventable disease and hunger and receive a basic education
<b>2 Marketing potential</b>	Engage 50% of Australians in this effort through some form of support (via World Vision)
<b>3 Primary segment/objective</b>	Attract child sponsors most likely to commit for at least 3 years Demonstrate that sponsorship enhances spiritual and social fulfillment of sponsors
<b>4 Needs, motivations and insight</b>	MATESHIP - belonging to a community that is committed to equality of opportunity Everybody deserves the chance to have a fair go in life
<b>5 Brand value proposition</b>	By supporting World Vision you can give someone a fair go in life
<b>6 Investment priorities</b>	Annual 'push' for sponsorship during seasonal 'window' in September - October
<b>7 Media/creative strategy</b>	TV and digital to drive traffic online for info gathering and application What's your world vision? Powerful music - 'many ways' - personal connection - sponsors' real experiences
<b>8 L-T assumptions</b>	Reposition World Vision from 2000, leverage through annual 'call to action' campaign



# 2 Market Research

## 2.1 Introduction

Regardless of organisational purpose or size, all not-for-profit organisations require information about the type of people they must engage with in order to fulfil their mission (their markets).

Market research should be collected at the beginning of the campaign planning process, to ensure informed decision-making in relation to:

- Target audience definition (including market segmentation)
- Brand/service value proposition
- Campaign messages and call to action
- Creative direction
- Channel/media selection and mix
- Event or sponsorship type and theme

## 2.2 Getting Started

*Before you engage in market research determine whether you have the skills to conduct the research in-house, or whether you require external support.*

Before you engage in market research, ask yourself the following questions about your proposed research:

- What questions are you aiming to answer? What decisions are you seeking to influence?
- What information do you require in order to make those key decisions or to answer your key questions?
- What programs of research (methods) will provide you with the right data (the information you need)?
- Is it necessary to actually do this research, or is the information you're seeking available through secondary resources?

Once you're clear on these questions, determine whether you have the skills to conduct the research in-house, or whether you require external support. This could be through a research agency, or a partnership with another not-for-profit organisation in your field.

*The research method you select should be matched to the type of decision you're seeking to influence and the type of information you need in order to make that decision.*

## 2.2.1 What is the Best Research Method?

There are different research design theories for consideration:

### **Experimental**

Control vs. non control group - rarely used in social research.

### **Cross-sectional**

Collection of data on more than one case and at a single point in time in connection with two or more variables, which are then examined to detect patterns of associations.

### **Longitudinal**

Over at least two time points (panel (broad) or cohort (certain characteristics)) - looking for change (or not).

### **Case study**

Detailed and intensive analysis of a single case.

### **Comparative**

Study using identical methods of two contrasting cases.

The research method you select should be matched to the type of decision you're seeking to influence and the type of information you need in order to make that decision. Broadly, there are two types of research – quantitative and qualitative.

### **Qualitative techniques**

Qualitative techniques usually involve relatively small numbers of people in interviews or focus groups. They are very useful for understanding complex issues like consumer behaviour, motivations and why people behave the way they do. They do not provide any kind of statistical data. The most common tools are: focus groups of 8-10 people discussing a single topic for up to an hour and a half; or, depth interviews, which can be one-on-one or in family groups for up to one hour. Focus groups are also vital as a first step in developing appropriate quantitative survey questions.

Each of these techniques requires trained interviewers, and you'll need a discussion guide or moderator's schedule. An example is included in Section 2 Appendix 3.

### **Quantitative techniques**

Quantitative techniques provide statistics, and usually involve asking a large number of people a question or set of questions (in no more than 20 minutes). The types of research methods are usually surveys; telephone, online, self-completion or face-to-face.

If in doubt, get in touch with your local Australian Market and Social Research Society (AMSRS) branch for a list of professional researchers in your region.

## When to use qualitative or quantitative research

	Qualitative	Quantitative
Focus	About the subject – the human	About the object – humanity
Methods	Interviews, focus groups, observations of people	Surveys, content analyses, questionnaires
Sample size	Less important than getting the right people to contribute	Important because you usually want to predict based on the results
Advice required?	Specialist expertise is usually required	Anyone can do it (with some basic skills and access to software)
Using the data	It's not always easy to understand what to do with the data	It's relatively easy to understand what to do with the data
Purpose	Useful for designing strategy and developing new ideas for innovation	Useful for checking whether or not to implement something, or whether or not something worked
DIY or agency?	Invest in a good researcher (don't try a DIY)	Invest in a good text book and an online survey license (DIY is feasible)
Can results be generalised?	It can't be assumed that these results will apply to others	If you have more than one survey and the results are similar/same, you can reasonably rely on the results

You can also contact any university and they will normally provide you with advice (up to a limit).

### 2.2.2 Engaging a Research Agency

*Interview the agency to help determine whether it is the right fit for your organisation.*

If you are considering engaging a research agency here are some questions to ask the agency to help determine whether it is the right fit for your organisation.

- What do you believe are the three biggest challenges facing the not-for-profit sector and what are some of the challenges facing my organisation in this marketplace?
- What do you understand about my organisation and its needs? What type of research have you done in our field and what did you learn from it?
- Can you show examples of what you've done creatively with a limited budget?
- How much of discount can you offer for not-for-profits?
- What model and methods do you use for your research and is it relevant to the not-for-profit sector?
- What are your assumptions about our proposed research?
- How will you present and explain the findings to our organisation to inform our decision-making process?
- How long will it take to complete the research?
- Are we able to keep and access the data in a format that we can use at a later date?
- Have you conducted research into significant behavioural change factors related to services and made recommendations for action?

If you do engage a research agency, you will need to provide them with a brief for the research project. See Section 2 Appendix 1 for a template.

## What if I can't afford a research agency?

If you can't afford to engage a research agency, there are many in-house research methods you can utilise (referred to in the following sections). It's important to go through the same preparation process that you would if you were using a research agency, to ensure that your upfront thinking is sound and you are in the best position to gain useful research data.

## 2.3 Budgeting

*Have a clear idea of the value the research will return for you.*

You will need to set a budget for your research project regardless of whether or not you will be working with a research agency. In-house research can also be costly in terms of staff time.

Before setting the budget, begin by determining how the data will be used in decision making and how significant these decisions are for the organisation. You can then set a budget based on your risk and return expectations (including the risk of not doing the research, which can be the biggest risk of all). The most important thing is to have a clear idea of the value the research will return for you.

As a general rule, your research spend should be 5%-10% of the value of the decision you're seeking to influence. For example, the value of the decision to improve the effectiveness of one campaign is likely to be worth less to the organisation than the decision to re-brand the entire organisation.

*There are three variables to consider in setting the budget: the amount you would spend 'in a perfect world'; the amount you have available; and, the amount you must spend in order to get any meaningful results.*

There are three variables to consider in setting the budget: the amount you would spend 'in a perfect world'; the amount you have available; and, the amount you must spend in order to get any meaningful results. There are compromises to be made between these variables and sometimes it pays to stretch your budget in order to get results that are valid and reliable.

It is usual to have to provide a 'business case' to the Board or management to gather the resources you require to undertake the research. See Section 2 Appendix 2 for a business case template and tips.

## 2.4 Check Lists

Below is a check list for planning market research.

### ○ Define the outcome you are seeking

The most important question is that of the outcome. What is the decision you are seeking to influence with the research and how do you expect the research will assist you to make a better decision? The clearer you are about this, the easier it will be to assess the value of the research.

### ○ Define your hypothesis

Your hypothesis will define the type of research you need to undertake. Hypotheses are defined in terms of 'if>then' statements. For example, 'if <something> happens then <something else> will happen too'. If I spend \$100 on fundraising then I will have \$500 more than I would have if I do not spend the money. Hypotheses assume that there is some previous evidence to make the 'if>then' statement. Sometimes this evidence is not available and you have to come up with 'softer' questions that may be based on your assumptions instead. That is, you know that you do not have all the facts yet and yet you still need to do something to keep moving forward.

*Surveys conducted for someone else can still hold valuable information for you and your research problem.*

*Try to involve others in your project and see if you can leverage your results across other departments or related organisations.*

### ○ **Check your assumptions**

Ask yourself what assumptions you have in framing the research, and how you can test those assumptions. You will find that different people have different assumptions about the research and it is a good idea to get some different points of view in addition to your own, that way you will see what else you might have missed. When you find yourself being certain of something, it is always a good idea to check whether or not your certainty is ‘truth’ in someone else’s eyes.

### ○ **Seek other points of view**

Another viewpoint (particularly that of someone who has previous experience with the problem you are trying to solve) can help you determine what you must research and what you do not need to research.

### ○ **Review secondary data sources**

Has this research been conducted before? You don’t want to be spending precious resources on finding out something that is already known but which you have been too busy to read. A quick scholar-google search will tell you if the research has made the journals. If you have an internal research register, this should be the first thing you check before commissioning more research. If the research is external to your organisation, it may be accessible simply by asking - most not-for-profit organisations are willing to share these types of resources. Don’t forget that surveys conducted for someone else can still hold valuable information for you and your research problem. They might need some more analysis but data can be useful for a long time before it ceases to have value. Data from other organisations can also help you frame your research more effectively.

### ○ **Check whether your research can be ‘piggy-backed’**

You may be able to ‘piggy back’ your research onto work by other organisations in your sector, or with other people within your organisation. A few extra questions added on to a survey that is being done elsewhere could be much more efficient than a completely new survey. Try to involve others in your project and see if you can leverage your results across other departments or related organisations.

### ○ **Select a methodology that is reliable**

Valid research measures what you set out to measure. Reliable research measures the same thing more than once and comes up with the same answer. The way to ensure validity is to make sure that you have checked all your assumptions before starting. Remember that your target research population is usually not people like you – you need their opinion to determine whether they think like you, or whether they have a different opinion. Using the right ‘stimulus’ material (pictures, concepts, words) is very important – these could be magazine images, or pre-selected images on display boards.

### ○ **Be deliberate about your sample size**

As a general rule, a sample size should be larger than 30 and less than 500. There should be a minimum of 30 in any sub-groups you want to know about. Any multivariate analysis should have at least 10 times the number of people to items (questions/variables). Therefore 250 people = 25 variables.

### ○ **Prepare a research brief**

See Section 2 Appendix 1.

## 2.5 Top Tips

The top tips for the new researcher are:

- 1 Establish a library of internal research on your intranet that's accessible across the organisation. It is worth spending the time digitising material because then it is available to everyone.
- 2 Avoid random samples from broadly defined populations. Actively select your sample from within your target market.
- 3 Remember that your research method may bias the responses, for example asking people to respond to an internet survey will only provide a sample of people who like to complete internet surveys. If possible, aim to utilise a few different methods.
- 4 Use existing clients/donors as part of the sample for market research – their opinions matter the most.
- 5 Never use research to ask people what you should do. The only way to judge what is best to do is by interpreting how people think and what might make them think differently.
- 6 Focus on the things that respondents really liked or really didn't like – this is where you will gain the key insights.
- 7 Think about where the audience is and if necessary, go to them. For example, have a space open for a day where people can drop in and you can ask them a few questions. Or establish a 'hotline' on your website (but remember some people do not have internet access). Make sure you respond to these ideas if they are suggested, or people will stop giving them to you.
- 8 Be realistic about the time it takes to complete the research and plan appropriately. If you need results fast, ask yourself if this is due to your poor planning, or is it really something urgent?
- 9 If you have the budget, look for research agencies who can help you articulate the problem you're trying to solve and can assist with preparing your research brief (defining your hypothesis and testing your assumptions). But ensure that you write the research objectives yourself (if you ask research agencies to do this, they will shape the agenda to suit what they are best able to deliver).
- 10 If you are planning a large scale quantitative survey first test the validity of your research questions on a sample of the market before going ahead with the full research.
- 11 Use qualitative research to define your quantitative research questions.
- 12 Be clear about which internal decisions will be influenced by the research you're completing and know who it is that's making the decisions (so the data is presented in a way that makes sense to the decision-maker).
- 13 Check whether the research you're completing is consistent with what's been done in the past so you can compare it (if possible).
- 14 Extract all the possible value from secondary research sources before embarking on new research.

*Think about where the audience is and if necessary, go to them.*

*Be clear about which internal decisions will be influenced by the research you're completing and know who it is that's making the decisions.*

- 15 Appoint an in-house project manager for the research – too many people ‘managing’ and making contact with the agency can be stressful for all involved.
- 16 Avoid conducting research at ‘peak times’ and during holiday periods – it can take longer.
- 17 To measure the effectiveness of an advertising campaign, allow for pre and post testing to be certain of your results. Book the research before you book the media.
- 18 Provide your research supplier with a fixed budget (based on the value to your organisation of the decision you’re seeking to influence), so they and you have clear expectations.

*To measure the effectiveness of an advertising campaign, allow for pre and post testing to be certain of your results. Book the research before you book the media.*

## 2.6 Traps and Pitfalls

Below are some traps and pitfalls relating to conducting market research both in-house or using a research agency.

### **Selecting the wrong agency**

Select an agency that is familiar with your industry. Do not use agencies that have no research experience or expertise (an advertising agency for example). Use an agency that has expertise in the methodological approach you want to use - most agencies are not competent in both qualitative and quantitative work. Aim to use an agency that comes recommended (ask to check references if you don’t have a recommendation from someone else), or refer to the Australian Market and Social Research Society (AMSRS) list as they have to comply with quality assurance guidelines.

### **Buying into agency ‘spin’**

Be wary of research agencies that promise too much too quickly. They may have to take shortcuts to deliver the project on time. Agencies may also ‘up-sell’ the work by offering a ‘basic’ product and then asking for additional investment for the complete product. The best way to avoid research agency ‘spin’ is to ask lots of questions.

### **Confusing DIY research with good value**

When developing the budget for your market research project, remember to factor in the staff time it will take to deliver your research in-house. It may actually be more costly than using an agency.

### **Ending up with data you can’t use**

Make sure that the data you collect is in a format that you can use (and re-use), so you can prepare reports for different audiences that may want to see different data sets. Consider all the users who may want to see the data, and what format they will need to see the data in – make sure you collect the data in a way that can be manipulated for the various formats you require.

*Make sure that the data you collect is in a format that you can use (and re-use), so you can prepare reports for different audiences that may want to see different data sets.*

## 2.7 Tools and Resources Available

### 2.7.1 Secondary Data Collection

There are a number of organisations that have market research data available for secondary analysis. While it is not 'primary' data, in the sense that it is custom designed and specifically collected for your needs, sometimes it can be a very useful first step when getting to know your market.

**The Australian Bureau of Statistics** holds data about the Australian population and has a wide range of reports related to business, individuals and government.

**Local councils** have a great deal of local knowledge and are very useful for understanding the environment, demographics and health and social issues affecting their area.

Another excellent resource is the **Australia Post** services.

**Industry peak bodies** often provide annual updates that can be very useful in your own planning. If you work closely with them, you can request to have questions inserted that are directly related to your issues. Industry peak bodies relevant to the sector are:

- Fundraising Institute of Australia
- Australian Marketing Institute
- Public Relations Institute of Australia

In addition to the Commonwealth Government, the various State and Territory **Governments** are also useful as resources, particularly if you need to seek government funding at any time. The various bodies within the governments also hold vast amounts of data, often very useful. It is a good idea to get someone to spend at least 2-3 hours a month 'trawling' for useful resources and when you find them, bookmark them and share them on your intranet.

**Journals and trade magazines** are often an excellent source of information. Journals are scholarly contributions (usually academic) and magazines are news (usually issues based). Both types are accessed by subscription. Find someone who has a subscription and see if you find it useful before subscribing.

Journals that are useful to the sector are:

- Journal of Non-profit and Public Sector Marketing
- Journal of Social Marketing
- International Journal of Not-for-Profit and Voluntary Sector Marketing
- Journal of Public Policy and Marketing
- Social Marketing Quarterly
- Nonprofit and Voluntary Sector Quarterly

**The Effie Awards** (social and not-for-profit category) often include research information.

Some email services are available including:

- McKrindle Research
- Roy Morgan
- Dunn & Bradstreet

## 2.7.2 Primary Data Collection

### Online programs

There are many online survey programs which can be useful for collecting data very quickly. Survey Monkey is a very inexpensive option. Results can be downloaded into excel format and the report format online is very simple and easy to use.

Doing market research on a low (or no) budget via Survey Monkey - <http://help.surveymonkey.com/app/home/session/L2F2LzEvc2lkL05Mb0FLMXBr/~~/guides-and-tutorials-on-using-surveymonkey>

Structuring the survey is extremely important to ensure that any results are accurate and provide the correct information. Refer to online Survey Monkey guide for how to structure an online survey - <http://s3.amazonaws.com/SurveyMonkeyFiles/SmartSurvey.pdf>

When using 'DIY' online survey software, consider who is likely to respond, and how well these people will represent the wider population about whom you are looking to make decisions. In some instances, your audience will not be online (for example an aged care audience).

### Omnibus data (can be both primary and secondary)

There are a number of organisations that conduct 'omnibus' research where you can subscribe to data reports and/or add some questions of your own to the research project.

For example, the Roy Morgan Research Centre undertakes a weekly survey of over 1,000 people as the basis for industry standard readership data and political opinion polling. This survey vehicle is also used to collect a wide range of information about people's opinions and behaviours, access to which is available for a fee.

### Focus groups

Focus groups are generally the most affordable and informative method for collecting research in a not-for-profit context. Some tips for conducting your own focus groups can be found here:

- <http://youtube/mwaYzapf7nQ>
- <http://youtube/dFRRg9TGckk>

A focus group discussion guide example can be found in Section 2 Appendix 3.

## Market Research Agency Brief

### Background to the research

What led to the research, what is the context for the research, what do you want to achieve with the research?

### What are the objectives and hypotheses?

- Research objectives (framed in terms of what you need to decide and want to know).
- Research hypotheses (written around the things that you already know something about).

There is usually a need to have both research objectives and hypotheses in a brief (your hypotheses might be wrong). Ideally your objectives will be written in SMART format (specific measurable attainable reasonable time-bound).

### Research approach: qualitative or quantitative?

If you don't know what is needed, talk through some alternatives with your potential agencies before preparing your brief.

### What is the sample for the research?

This could include information relating to geographic location, type of technology available to the audience, literacy levels, previous choice behaviour (if you have it), age, income, education and occupation. It is helpful to provide the agency with as much information as you have available on sampling, so that they can provide you with an accurate quote.

### What is the timeframe?

Note that it generally takes around 10-12 weeks for an agency to conduct market research.

### What are the expected deliverables?

What do you want and when do you need it? Format, style, level of reporting, language and distribution methods are all important considerations. Don't rely on the agency to guess what you want. Ad hoc requests for alternative additional report formats can become very expensive after the event.

### What is the budget?

Be honest with the agency about the amount of money you have available. It is not unusual to ask for a quotation based on scenarios, and to ask for a not-for-profit discount.

### Who are the contacts for the project?

These people may include the in-house project manager, the key decision-maker and the manager responsible for utilising the outcomes of the research.

### Where to go for further support

The free Sweeney Research guide on writing a research brief may be useful:

[http://www.sweeneyresearch.com.au/research-and-consulting\\_writing-research-brief.aspx](http://www.sweeneyresearch.com.au/research-and-consulting_writing-research-brief.aspx)

## Preparing a Business Case

### Tips for writing a good business case

- Keep it simple and write to the level of the reader. Your argument should be made in familiar terms that the decision-makers can easily understand.
- Present a complete picture of the project and all its phases including timelines and expected outcomes.
- Focus on people and processes. Don't just focus on numbers – there are other non-financial components that are important too.
- Clearly state how the business case contributes to your organisation's strategic goals and delivers business or social value.
- Make sure any financial assumptions are both quantifiable and verifiable. Explain any estimations that you have made.
- Unless you are absolutely sure that people are technically proficient, never assume that they will understand...(explain and explain again).
- Don't over-engineer your business case. Being overly pedantic only adds complexity.
- Remember the other's point of view and explain the value from their perspective.
- The length of the business case will depend on the expectations of your organisation. Some organisations require detailed 20 page documents, while other organisations prefer succinct documents of three-five pages.
- The executive summary should read as a 'stand-alone' document and include all key points.
- Be sure to get management buy-in of your case before seeking formal approval.
- Ensure you seek expert advice when you need it. In particular when creating financial projections and calculating return on investment.
- Include all options and opinions – the more biased your case, the more likely it is to be rejected.

## **Suggested headings for a business case**

### *Executive summary*

#### *Introduction*

- Overview of the project
- Establishment of need for project
- Estimations of costs and benefits

#### *Background*

- SWOT analysis (relate to external context)
- Issue in context (relate to organisational goals)
- What is known about the problem or issue
- What is not known
- What we believe can be done given available information
- Critical success factors
- Need for research

#### *Research goals and objectives*

- Research objectives > research questions > hypotheses
- Methodology
- Associated costs
- Timeframes

#### *Expected outcomes*

(in order of short, medium and long term)

- Social
- Financial

#### *Budget and forecasts*

## Focus Group Discussion Guide Example

Below is an example focus group discussion guide – this was used to conduct focus groups with internal staff to determine an employee value proposition.

### Introduction

- Why the interview is happening.
- Define 'rules'.

### Background

- General discussion of the worst job participants have ever done in their life (warm-up /ice-breaker).

### What do we want out of a job?

- Let's not talk about (employer), just jobs in general.
- When we think about what we want out of our job, what are we looking for? What makes a really great job? What makes an awful job?
- What about the actual employer? What makes a good or bad employer?

### Not-for-profit sector in particular

- For many people it is a specific choice to work in the not-for-profit sector rather than other sectors. Was it a specific choice to work in the not-for-profit sector? Why or why not?

### Employer in particular

- Tell me about the motivation to work at (employer) in particular. Why did you choose (employer)?
- I am now going to give you a magazine to flick through. Please select three images that best describes how you view (employer) as an employer.
- What do you like most about your job? What do you like least about it?
- What do you like most about (employer) as an employer? What do you like least about it?
- Why do you think most people come to work here?
- When friends ask you about what it's like working at (employer), what do you say?

### Culture and touch-points

- What sort of people work at (employer)? Is there a 'type' of person working here?
- Every organisation has a culture that tells people 'the way we do things around here'. Sometimes they're written down like in a manual – but more often than not, people don't read the manual, and behaviours are developed by a whole lot of unspoken conventions.
- When you first started at (employer), how did you find out about the way things were done i.e. what was acceptable or not? Do particular people have more influence on the way things are done than others?
- What about where you find out information about what's going on at (employer)?

### Communication

- Display board with internal communications materials. Participants to state whether they do or don't use the material.

### Slogans

- Explore the following slogans (pre-prepared on boards) – to what extent do they summarise what you feel about (employer)? Which ones and why?
- Participants to select the top three slogan boards as a group.



# 3 Marketing Campaign Implementation

## 3.1 Introduction

For many not-for-profits, the budget available to invest in campaign implementation is very limited – it's much easier to invest a large marketing budget in mass media than it is to invest a small budget in more local/targeted initiatives, particularly when the goals and expected outcomes are often the same.

In preparing for campaign implementation, you will need to consider your campaign creative (the look and feel and messaging of your campaign) and your media/channel selection (the tactics you will implement).

## 3.2 Getting Started

### 3.2.1 Campaign 'Power'

There are two aspects of campaign 'power' in influencing your target audience: creative power, and media power. This is good news for not-for-profits with a limited budget and less to invest in media, as it's possible to have a significant impact from a creative perspective.

*It is possible to have a significant impact, from a creative perspective, for not-for-profits with a limited budget and less to invest in media.*

#### Creative Power

The power of the creative idea to grab the target audience's attention and engage them enough to influence how they think and feel.

#### Media Power

The power to maximise the impact of each media placement by presenting the creative idea to the right people in the right context at the right time.

Campaign planning understands how the target audience thinks, feels and acts to deliver messages with maximum creative and media power.

*Start with a media buying agency that will be able to provide useful data on your audience's media consumption patterns.*

## Media 'power'

'Media power' relates to the channels you choose to deliver your creative message, and should take into account:

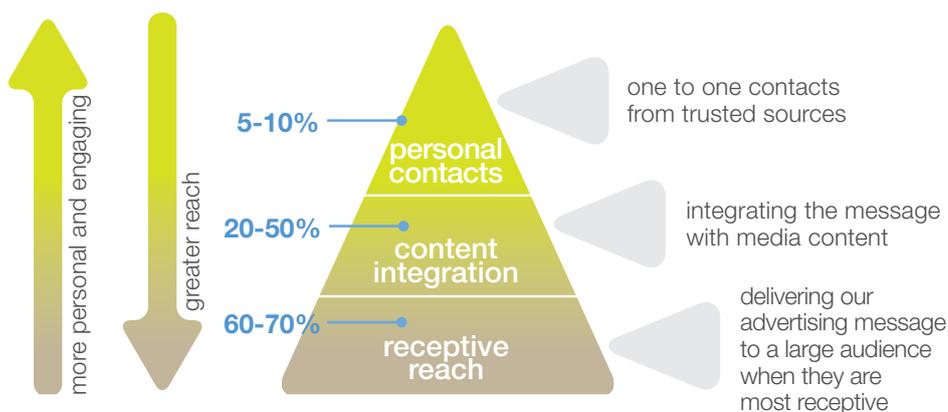
- Your campaign objectives – what type of action are you seeking to generate?
- Your audience and their media consumption patterns.
- Your budget.

Often the best place to start is with a media buying agency that (once briefed on your objectives, your budget and your audience) will be able to provide useful data on your audience's media consumption patterns. This information, coupled with any insights you have collected about your audience in the research stage, will allow you to make informed decisions about the most appropriate media channels to utilise.

Campaign channels can fall into three categories:

- Receptive reach (mass media reaching a large audience).
- Content integration (mediums that allow you to integrate more personal content, such as online).
- Personal contacts (one to one contacts with trusted sources).

This is represented below. For a larger scale campaign, the split between each channel category would be as indicated in blue. For a smaller more local campaign, more emphasis may be placed on personal contacts.



Generally a mix of all three channel categories is useful (if your budget allows), where broad awareness is generated through some mass media, and messages are sustained through partnerships with local community groups. PR tactics are often a useful way of sustaining your key messages at a local level.

*When selecting channels, it's also useful to consider the 'moment fit' of your channel to your message. What state of mind are your audience in when they are consuming a certain type of media?*

When selecting channels, it's also useful to consider the 'moment fit' of your channel to your message. What state of mind are your audience in when they are consuming a certain type of media? For example, people are often relaxed when reading the Sunday Age, and often busy when listening to morning radio. Aim to select media that match your message to the emotional state of your audience when they are consuming that media.

*One of the advantages of not-for-profit organisations is their access to highly emotive content.*

*It's important to test story board concepts of your campaign creative (creative hypothesis), before launching your campaign.*

*Be firm with internal stakeholders who suggest changes to your creative direction – always bring your justifications of your creative back to your original research-based rationale.*

## **Creative 'power'**

It's important that your creative content tells a story. One of the advantages of not-for-profit organisations is their access to highly emotive content. By engaging with the hearts of your audience, you will have a better chance of engaging their minds. Once you have engaged the hearts of your audience, it's possible to move from emotional awareness to rational action. There is critical value in understanding the emotional context that your audience is coming from, and tailoring your creative message to resonate with this. Appropriate casting is crucial – who is delivering your message, and will your audience relate to them?

It's important to test story board concepts of your campaign creative (creative hypothesis), before launching your campaign. Even if you have no budget or only have access to a small number of people in your target audience, invite them to view the campaign concepts and give their feedback. You will often be surprised at the insights this process generates. As you are developing the creative content, keep an open mind, and allow it to take the direction your market research indicates will work best. Start testing your creative early in the process, and allow it to move and shift depending on the feedback you receive from your audience through research.

The development of creative content can be an area that multiple internal stakeholders are interested in. It's important to ensure that your creative is designed based on your market research, and that you have a clear rationale behind it (who is your primary audience, and what types of messages does your market research suggest will resonate with them?). Be firm with internal stakeholders who suggest changes to your creative direction – always bring your justifications of your creative back to your original research-based rationale. In gaining internal sign-off on the creative, aim to work with as small a group of people as possible (if too many people are involved, the idea can quickly be watered down). Aim to engage your internal sign-off group with your strategy first (bring them on the strategic journey), which should ensure that your creative will speak for itself and won't require justification. In some instances, if you sell your strategy well, your creative won't require discussion at all. This is where it's important to 'market' the marketing team as the internal experts.

### **3.2.2 Engaging an Agency**

If you are planning on working with an agency, it's advisable not to ask for pro bono work. If you are a paying client, you maintain creative control, you are able to set the timeframes and you retain the IP. Pro bono campaigns may win industry awards (the outcome the agency is seeking), but they may not deliver on your specific marketing objectives. It's best to form a relationship with the agency as a paying client, and ask for a not-for-profit discount (you can usually obtain roughly 25% reduction in costs). Always ask the agency to include Community Service Announcements (CSAs) as part of the campaign.

Look for a creative agency who has experience in working with not-for-profits (especially paid work, not just pro-bono), as they'll have a better understanding of the industry and the needs of your organisation.

## Media buying agencies

If you are planning on buying media space, the use of a media buying agency is recommended for the following reasons:

### **Value for money**

Working with a media buying agency will generally save you money as a result of the discounts they are able to receive.

### **Access to statistical data**

The agency should be able to provide you with statistical information relating to the media consumption patterns of your audience and data on the media spend of your competitors.

### **Tracking**

A media buying agency can track your results against competitor activity, allowing you to set benchmarks. They also have access to brand awareness forecasting tools, which are useful in the planning phase.

### **Quality of reach**

A media buying agency has the experience to ensure your ad appears in the most effective timeslots/pages of the paper etc.

### **Experience**

Media agencies will have a strong understand of which channels are most effective within which audiences, ultimately ensuring you get the best return for your investment.

## Creative agencies

If budget allows, it is recommended that you engage an external creative consultant to provide guidance and direction on the creative content of your campaign. Where possible, aim to recruit a media and creative agency at the same time, to ensure the channel is matched to your message, and to encourage your agencies to collaborate. It's important to have all your agencies (media buying agency, creative agency, research agency, strategist etc) in the one room when you're developing your campaign creative. Each will have a unique perspective and you will get the best results if all views are integrated.

## What if I can't afford an agency?

Assuming that some element of graphic design will be required for your campaign, and that you don't have an internal graphic designer, some form of external support will be required. It is recommended that you seek an agency with experience in campaign design, as opposed to a 'stand alone' graphic designer, as they generally won't be able to provide insights into the effectiveness of your campaign creative. However, if your budget is particularly limited, working with a graphic designer alone is an option, as long as your brief is firmly grounded in the research and analysis conducted in steps one and two of the Tool Kit.

If you are planning on buying media space, it's highly recommended that you utilise a media buying agency, as this should actually be a cheaper option than buying the media space yourself. In working with a media buyer, you also have access to the added benefit of their research into your audience, and their expertise in channel recommendation and selection. There are also a range of free mass media options, including Community Service Announcements (CSAs) on television and filler ads in newspapers (just bear in mind that these won't always reach your target audience).

*Have all your agencies in the one room when you're developing your campaign creative.*

*If you are planning on buying media space, it's highly recommended that you utilise a media buying agency, as this should actually be a cheaper option than buying the media space yourself.*

With the emergence of social media, not-for-profits now have access to a host of free tools. If your budget is particularly limited, consider investing your budget in a video camera, some video editing software and some training for your staff in social media tools (such as Word Press). This is generally a more effective use of funds than one-off media activity.

*Remember that you have access to an entire team of brand ambassadors who can be harnessed to deliver your messages.*

Given that word of mouth marketing is one of the most powerful forms of marketing, it's also useful to remember that you have access to an entire team of brand ambassadors (your organisation's staff, donors, volunteers and members) who can be harnessed to deliver your messages. Invest time in educating them on your organisation's key messages and provide them with as many tools as possible to speak on your behalf.

### 3.3 Budgeting

Budget will need to be set for the development of the campaign creative, and the use of relevant media channels/tactics. With the multiplicity of media channels now available, setting investment priorities can be challenging. Here are some factors to consider when setting your campaign implementation budget:

#### **Who is your audience?**

What are their media consumption patterns – how/where can you reach them? Media buying agencies can often provide this advice.

#### **What are your objectives?**

What level of impact would you need to have to achieve your campaign objectives? What level of awareness would you need to reach, and how many campaign touch points would it take to generate action?

#### **Realistically, how much does your organisation have to invest?**

Not-for-profit organisations generally have limited budgets, so you will need to work within those constraints, and you need to understand what those constraints are and what drives those limitations.

#### **What are your competitors spending?**

The success of a campaign can sometimes depend on your 'share of voice' – your media spend relative to your competitors (the management teams that approve your budgets are also often interested in this information). If possible, consider international examples.

When setting the investment, you should begin with a long term view (three years) then work back to a year one goal and associated investment.

*If you're operating with a very small (or no) budget, as a minimum aim to test your campaign creative with internal stakeholders or existing clients.*

It's important to allow for investment in research (roughly 5% of your budget) to test your campaign creative concepts. There is a significant risk mitigation benefit in conducting this research to ensure your creative resonates with your audience. It's also very useful to have this data to provide to your CEO or Board – this shows that there is some 'science' behind the campaign development process and helps to generate internal buy-in. If you're operating with a very small (or no) budget, as a minimum aim to test your campaign creative with internal stakeholders or existing clients.

### 3.3.1 Developing the Case for Support

If you are seeking a campaign investment greater than that which your organisation has invested in past campaigns, you should prepare a business case to justify the investment. See the Appendices in section two for a guide to preparing a business case. It's beneficial for the business case to include examples (including budgets) from within the industry, and it's crucial to understand the mindset of your decision-makers – what is it they want to see?

*If your business case is not successful – don't despair! Try running a smaller scale campaign. Measure your results and use them as evidence in your business case next time around.*

If your business case is not successful – don't despair! This is simply a challenge for you to work around. One way of doing this is to take the budget you have available, and run a small scale campaign amongst a very specific audience segment. Track the results, and use it as evidence of success for your next business case the following year.

## 3.4 Checklists

- Have I done my homework? Do I clearly understand my campaign objectives, and what behavioural change I'm seeking to elicit?
- Do I have a clear understanding of who my audience is, including what motivates them, and what their media consumption patterns are? Have I collected this information through research?
- If I am seeking to utilise mass media, have I engaged a media buyer?
- Have I tested my campaign creative concept with my audience, prior to launch?
- Have I briefed and educated my internal stakeholders on the campaign prior to launch?
- Have I considered PR channels as an element of my campaign?
- Does my creative link directly to the motivations of my audience (based on market research)?
- Have I thought creatively about how to engage my audience (maximising creative power if limited funds are available for media power).
- Have I considered the use of CSAs and filler ads?

## 3.5 Top Tips

### **Know your objectives**

Keep in mind the clear behavioural objectives you are seeking to achieve as you plan your implementation strategy. Determine at the outset what campaign success will look like, and conversely, what success will not look like (eg short bursts of behavioural change with no lasting impact when the campaign is not running).

### **Understand how marketing tactics/channels relate to your objectives**

It's important to have a clear idea of how each tactic you are utilising contributes to the success of your campaign, allowing you to alter channels as required (based on research into the effectiveness of your campaign).

*Keep in mind the clear behavioural objectives you are seeking to achieve as you plan your implementation strategy.*

*Filter all your decisions through what you know about the mindset of your audience.*

### **Match your messages to your channels**

Your message should always be matched to your channel. For example, highly emotive content is best communicated through video (either online or TV).

### **Keep your target audience front of mind**

Keep your target audience firmly in mind at all stages through the campaign implementation process. Filter all your decisions through what you know about the mindset of your audience.

### **Encourage agencies to work collaboratively and strategically**

If you are utilising agencies in the development and implementation of your campaign, encourage them to work collaboratively through regular campaign meetings, always retaining a focus on the key marketing objectives – they can often add value to each other's work, and it can save you time if they're working directly with each other.

### **Optimise your campaign**

Continual review of your campaign's performance is important, as it's highly likely that it will need to be altered over time. Optimising your campaign involves releasing multiple versions of your creative concepts, then tracking which generate the highest engagement. For example, you may release a few different versions of an online ad, then by monitoring click-throughs, determine which of the concepts was more effective.

### **Understand media trends**

It's wise if possible to make sure you have an understanding of Australia's media trends and how the media operate. How do the media measure and track circulation, and what types of media are increasing or decreasing in use? A media buying agency can provide advice on this.

### **Know your budget**

It's important to understand what resources you have available, as well as your available budget. This will guide your channel selection and creative decisions. If you know your budget is limited, focus on local and online marketing.

### **Pilot your campaign**

If possible, aim to conduct a small pilot of the campaign, within a smaller region, to allow you to test results and seek additional audience feedback – this way you can continue to refine and enhance your campaign's effectiveness. You may also find that your message is not relevant to particular subsets of the community, for example people in rural areas may require a different approach with slightly different messages.

### **Use your market research to guide and refine your campaign messages**

Look carefully at your market research and what it's telling you. What insights can you gain about your audience? What are the barriers to them completing the desired action? What motivates your audience, and what will motivate them to overcome the barriers to your desired action? These clues will help you in designing the creative message for your campaign.

### **Remember that your campaign should not be static**

Don't assume that a campaign is set in stone once implementation occurs – aim to constantly review effectiveness and refine your media selection and your creative messages.

*If possible, aim to conduct a small pilot of the campaign, within a smaller region, to allow you to test results and seek additional audience feedback.*

### **Remember that marketing is a system, not a series of one-offs**

Marketing campaigns should not be run in isolation of an overall marketing strategy.

### **Filter all channel selection through strategy**

There are times when an opportunity arises to utilise a particular marketing channel. It may be a staff member who requests an ad in the local paper, it may be a free radio spot. When new opportunities arise, instead of immediately actioning these, stop, and consider what your overarching marketing strategy is, and how that channel would (or wouldn't) assist you to reach your key audiences and achieve your marketing goals.

### **Review your existing channels**

Most not-for-profit organisations undertake a range of historical and ongoing activities, for example, sending a newsletter to stakeholders. At least yearly, stop and evaluate all your existing marketing tools. Are they all specifically geared towards achieving your marketing goals? If not, it's probably time to modify them.

### **Integrate social media – if relevant**

Social media is an excellent tool for not-for-profits, but should only be used when relevant. For example, implementing social media for an aged care audience is unlikely to be successful given the take-up of social media amongst that group. Tips relating to the use of social media are included in Section 3 Appendix 1.

### **Get your internal stakeholders onside**

It's valuable to 'launch' your campaign internally before it's launched externally. This will ensure that your staff are prepared to answer any questions that may be generated as a result of the campaign, and will help to prepare your staff to be 'brand ambassadors', reinforcing your campaign message through word of mouth marketing with their networks.

### **Create a campaign 'micro site'**

Wherever possible, establish a micro site for your campaign, which could be as simple as using free blog technology, such as WordPress. This will allow for a clear call to action (drive people to the website to find out more), and will ensure that people who are interested in the campaign access only information that is directly relevant to them (will ensure clarity of campaign message). It also allows you to create additional relevant content, that you wouldn't include on your standard website, to better engage your audience. And it's a great way to measure the success of your campaign, by tracking how many people visit your micro site.

## **3.6 Traps and Pitfalls**

### **Adding ad hoc channels that aren't linked to strategy (focussing on tactics rather than strategy)**

Avoid implementing a particular channel simply because an opportunity arises, or that's the way you've always done it. Robustly test every channel you utilise (new and existing) against your marketing goals and your primary audience. If the channel is not directly linked to achieving one of your marketing goals, amongst one of your key audience groups, ask yourself why you are implementing it. For example – you may consider engaging in social media, because everyone else seems to be, with no clear purpose for that activity, with no link to a marketing goal. This is time and energy wasted – time and energy that could be directed to strategic marketing activity.

*At least yearly, stop and evaluate all your existing marketing tools. Are they all specifically geared towards achieving your marketing goals?*

*Robustly test every channel you utilise (new and existing) against your marketing goals and your primary audience.*

### **Attempting to integrate a fundraising ask into a marketing campaign**

There will often be internal stakeholders who would like to see a fundraising ‘ask’ incorporated into a marketing campaign. Try and avoid this – it will only confuse and dilute your message. Allow the campaign to indirectly influence your donors by building your brand and demonstrating the great projects your organisation is involved with.

### **Relying on social media tools without strategic focus**

Smaller not-for-profits often rely on PR and free technology such as social media to deliver marketing campaigns. These are excellent resources for DIY marketing, but remember that these tools are never actually free – they require an investment of staff time that needs to be considered in your budgeting process. Volunteers or non-marketing staff are useful resources to utilise in managing your social media profiles, but remember to spend the time educating them on your key messages and managing these resources – sometimes their enthusiasm overrides their consistency.

### **Setting too many objectives**

Try and limit the number of objectives you’re seeking to achieve – the fewer, the better (ideally no more than three). This will allow you to focus your efforts, and will make campaign planning (channel selection and creative design) much clearer.

*Try and limit the number of objectives you’re seeking to achieve – the fewer, the better (ideally no more than three).*

## **3.7 Tools and Resources Available**

There are a range of case studies available for purchase on the Public Relations Institute of Australia website.

You can also approach your peers for case studies, or advice. Building up a peer network that you can go to for advice can be an invaluable tool.

Roy Morgan Single Source – access to customer research data.

*One of the benefits of social media is its wide reach, but if you are talking to a specific audience, be aware of who else might be listening.*

### Section 3: Appendix 1

## Social Media Tips

### **Only extraordinarily outstanding content goes viral**

Do not expect it or plan for a viral strategy - this is often an 'organic' process. A one-off attempt at a viral campaign often looks like one - audiences will see through this and you will have invested in a poor, unwatched wasted online production.

### **Speed of response matters**

A timely response to social media comments not only shows you are constantly listening, but also provides the illusion of a real-time "conversation".

### **Give up control of your brand**

Let the audience co-create and develop the brand with you.

### **Be authentic and transparent**

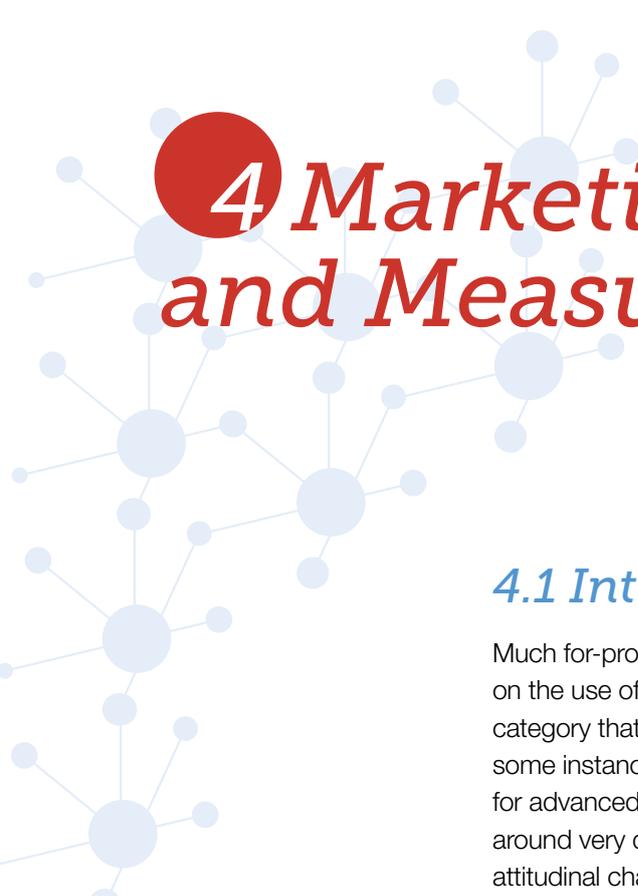
Don't force a brand mentality or 'voice'. Be genuine and honest, and admit to your mistakes. A social media strategy is about being 'social', and therefore accountable to everyone.

### **Be aware of your reach**

One of the benefits of social media is its wide reach, but if you are talking to a specific audience, be aware of who else might be listening. Find the balance between a social media strategy that talks to everyone and engages no-one, and one that talks specifically to your key audience without upsetting other audiences.

### **Your people, not the technology, are key to impact**

The ability of your people to commit to social media and create engaging content will make or break your social media strategy.



# 4 Marketing Metrics and Measurement

## 4.1 Introduction

Much for-profit marketing industry discussion around marketing metrics is focussed on the use of costly research agencies, or on 'sales', which is not necessarily a category that applies to not-for-profit organisations (although it could be adapted in some instances). Not-for-profit organisations not only tend to have limited budgets for advanced metrics/measurement programs, they also need to generate metrics around very different KPIs – for example, engagement, behavioural change, and attitudinal change.

*A not-for-profit metrics 'dashboard' will need to include a range of metrics that are generally not relevant to the for-profit sector.*

A not-for-profit metrics 'dashboard' will need to include a range of metrics that are generally not relevant to the for-profit sector, with evaluation methods that are able to be completed in-house, or at very little cost.

It is important to note that in discussing marketing metrics, we are not talking about measuring the effectiveness of service delivery (customer satisfaction), we are talking about measuring the effectiveness of marketing activity – has our marketing activity generated the desired impact? However, customer satisfaction may be a measure that could be used to indicate whether the external brand promise is being matched by the internal reality of a customer's experience with your organisation. In that instance, taking a measure of customer satisfaction would provide an insight into the health of your brand, however customer satisfaction is not specifically covered in this section.

## 4.2 Getting Started

When designing a metrics system, there are two key questions:

- 1 **What should we measure** (which metrics should we use to determine whether we achieved our marketing goals, and which metrics will provide data that will inform our key marketing planning decisions)?
- 2 **How should we measure** (what is the most appropriate methodology to collect the measures we are seeking)?

## 4.2.1 Selecting Metrics – What Should we Measure?

*Select metrics that are relevant to your organisation and most importantly, your marketing goals.*

Marketing metrics will vary for every organisation, so it's important to select metrics that are relevant to your organisation and most importantly, your marketing goals. Hence the first question to ask in determining what should be included in your 'metrics dashboard' is – what are your marketing goals (linked back to organisational goals). All marketing activity should be linked to a clear purpose or goal, hence what we are seeking to determine through marketing metrics is whether the marketing activity we undertook was effective in delivering on these goals.

When designing a metrics system, it's not enough to answer – did the marketing activity deliver on our marketing goals? We also need to be able to determine how/ if we should alter investment, channel selection and creative in future campaigns. If it worked, that's great – but what do we need to know to make it better (which part/s of the campaign can we attribute to the success)? And if it didn't work, what do we need to know to ensure success next time (which part/s of the campaign let us down)?

In broad terms, not-for-profit marketing metrics can fall into a few different categories, depending on the goals you are seeking to achieve:

- Competitor activity (benchmarking) – how are we tracking against competitors?
- Brand metrics – did we raise awareness of the brand and/or engagement with the brand, and is our brand healthy?
- Direct response metrics – did we generate the desired action?
- Channel metrics – are our channels/tactics effective?

Within each of these categories, there are a range of metrics that may be useful.

### **Brand metrics**

Brand metrics are designed to measure whether awareness of a brand or engagement with a brand (brand equity) has increased or decreased. This is an important metric in establishing how much or little 'goodwill' an organisation may have. Goodwill is known over time to have a positive impact on call to action campaigns, hence it's important to track whether you need to 'top up' your organisation's goodwill. Measures in this category could include:

- Prompted brand awareness
- Unprompted brand awareness
- Engagement
- Emotional connection with the brand (positive, neutral and negative)
- Brand associations
- Customer satisfaction

### **Direct response metrics**

Direct response metrics are designed to measure whether marketing activity generated the specific desired action (as determined by the marketing goals). There are a multitude of measures that could be included in this category, depending on the specific call to action in your advertising campaign. Some of these measures could be:

- Downloads
- Phone calls
- Participation on social media sites
- Visits to the website

## Competitive metrics

Competitive metrics are designed to determine how you are tracking against your competitors (often a favourite of executive teams and Boards). While it's important to understand whether your marketing activity is generating positive results for your organisation, it's also important to understand how your competitors may be tracking – you may be generating great results, but if your competitors are still doing better, you may have more work to do. Measures in this category could include:

- Brand preference
- Share of voice (mass media)
- Share of voice (free media)
- Tactics/positioning

## Channel/tactics metrics

Channel metrics, or individual tactic metrics, involve measurement of a particular tactic/channel in isolation. The difficulty with channel metrics is that often it's very hard to link the effectiveness of one particular channel directly to marketing goals (for example, whether we sold more or less merchandise than we anticipated gives no indication as to how we are tracking against our overall marketing goals – unless our goal is to sell merchandise). Hence it is suggested that channel/tactic metrics be used sparingly and a broader approach (utilising metrics from the above three categories) be utilised as the primary determinant of marketing effectiveness. However, if you were to measure individual channels/tactics, some measures might be:

- Event attendance/participation
- Target Audience Rating Points (TARPs)
- Relationships generated
- Post event surveys
- Merchandise sales

When selecting what to measure, it is important to ensure that collecting this information will not simply produce data for data's sake, but will provide you with information that will enable you to make relevant decisions (for example, should we increase or decrease investment in our key marketing channels, or should we engage in more or less online activity?).

## 4.2.2 Selecting Methodologies – How Should we Measure?

Once you have selected the types of metrics that will make up your metrics dashboard (those metrics that will allow you to make decisions about your future marketing activity), the next step is to determine which methodology you will use to collect measurements. Note that the order of this process should not be inverted – it is always best to start by determining what you want to measure, as opposed to how you will measure it (otherwise you risk collecting metrics that may actually be completely irrelevant to decision-making).

*The difficulty with channel metrics is that often it's very hard to link the effectiveness of one particular channel directly to marketing goals.*

*Start by determining what you want to measure, as opposed to how you will measure it.*

In selecting a methodology, it's important to ensure that you are collecting measures from within a relevant stakeholder group. For example, if your primary goal is to increase donations, there is not much point measuring brand awareness amongst a broader stakeholder group. The methodology you select can sometimes depend on your audience, for example if you're looking for a reading on brand awareness amongst prospective aged care customers, there is not much point using an online survey, as the majority of this group will not be comfortable with that medium. It's important to consider who your audience is and how you can access them before you select a methodology.

*Not-for-profit marketers must design creative in-house methods to measure marketing performance.*

Many of the methodologies available to the for-profit sector are not so readily available to the not-for-profit sector (as very limited funds are available to pay for advanced research and tracking programs). Often, not-for-profit marketers must design creative in-house methods to measure marketing performance, ensuring that the research doesn't cost more than the actual value it will have in driving marketing decisions. Below are some of the most commonly used metrics methodologies in the not-for-profit sector.

### **Brand measurement methodologies**

Given the budget restrictions that are often faced by the not-for-profit sector, DIY qualitative research is generally the best methodology. This involves developing surveys (either paper-based, online or phone-based) and distributing them to your key market segments (a read amongst 30-40 people is enough to gauge awareness). A useful way to access people in your key markets who you do not yet have a relationship with is by finding a 'decision maker' or connection point within the market (for example to reach a Christian audience, you might approach the pastor of a church, or to reach an older age group, you might approach a Rotary Club) and ask whether they would be able to distribute your survey to their contacts. See the Appendices in Section Two of this Tool Kit for an example of a focus group discussion guide.

*Focus groups are generally accepted as the 'best practice' methodology for measuring brand awareness and customer perceptions in the not-for-profit sector.*

DIY qualitative research could also involve focus groups, which are generally accepted as the 'best practice' methodology for measuring brand awareness and customer perceptions in the not-for-profit sector. By approaching a decision-maker in the market for a list of names, and offering participants a small monetary incentive, it is possible to collect useful metrics using this method. Qualitative surveys should be done regularly, ideally each quarter, as they are only ever a 'moment in time' snap shot.

It may also possible to 'tag along' with an existing Omnibus survey, by having one brand-related question added.

There are of course research agencies that can undertake detailed and complex brand tracking surveys, however the costs of such surveys are generally not affordable. However, if you are able to partner with one or more other not-for-profit organisations in your industry, this can become an affordable option, where you will all gain useful insight into the strength of your brand, while also gaining a benchmark measure against others in your industry. It is often worthwhile establishing networks with other marketing professionals in your industry for purposes such as this.

## **Direct response (call to action) measurement methodologies**

Depending on the nature of your call to action, there are a range of ways to measure effectiveness, all with the aim of answering the question - was your call to action taken up?

### **Telephone call to action**

If your call to action directed people to a telephone number, it is important to have a form available (either paper based or through your intranet) that the reception teams fill in to track how many calls are coming through, and where the caller heard of you.

### **Website call to action**

If your call to action directed people to your website, it is best if possible to establish a micro site or a specific page to direct people to (this will make tracking much easier). There are a range of programs that will track your website statistics for you and generate automatic reports (such as Google Analytics).

### **Social media call to action**

If your call to action directed people to your social media pages, the best measures will be engagement statistics on your pages. Program such as Klout can connect to all your social media accounts and give you a total measure of engagement.

### **'Sign up' call to action**

If your call to action directed people to sign up for an event, or e-news list, or mailing list, the number of people that register through those mediums will give you a read on your success.

### **Advocacy call to action**

Measuring the impact of advocacy (particularly in relation to behavioural change) is much more difficult. The measures selected will depend on the specific call to action, however some industry bodies or health care agencies may be able to provide statistics that are relevant. For example, one of the measures that the Heart Foundation used to determine the effectiveness of their Early Warning Signs campaign was the number of calls made to 000 (an indicator of the desired behaviour change).

It is important to be very clear on the call to action in your marketing materials, as this will determine how easy (or not) it is to measure success. Ensure that you are clear on what it is you are asking people to do (or stop doing in the case of social change/advocacy campaigns).

With all measures, it is useful to overlay your direct response results (how many phone calls or web visits you received) with the timing of key activities in your marketing program, in order to reveal any correlation. Testing different channels at different times of year is a useful way to reveal which channels are most effective at driving your call to action.

*It is important to be very clear on the call to action in your marketing materials, as this will determine how easy (or not) it is to measure success.*

*With all measures, it is useful to overlay your direct response results (how many phone calls or web visits you received) with the timing of key activities in your marketing program, in order to reveal any correlation.*

## Competitive measurement methodologies

There are a number of ways to track competitor's marketing activity with the aim of determining their market share, media spend, free media reach (editorial) and marketing tactics/positioning.

### Market share

In some industries it is possible to collect pooled data on the market share of competitors. This is often available through secondary sources such as Government websites or annual reports. However it is important to note that in some instances, market share is not a relevant measure, for example while it may be possible to determine where an organisation sits in regards to total government funding, if your marketing activity is not directed at securing government funding, then this is not a particularly relevant measure.

### Share of voice (mass media)

If you have budget available, media-buying agencies will be able to provide you with a breakdown of the mass media spend of selected competitors over various timeframes. This provides a useful indication of the relative 'share of voice' of your mass marketing over competitors. However, media buying agencies are only able to track paid mass media advertising, which often doesn't cover the full spectrum of a competitor's marketing activities.

### Share of voice (editorial)

Again, if you have some budget available, and depending on the importance of this information to your ability to make campaign related decisions, companies like Media Monitors are able to track the reach of value of your media (free editorial media) over your competitors. While many executive teams favour these type of metrics, it is important to ask yourself whether you are actually able to make any decisions following collection of this data. If the data is only interesting to executive teams, but not relevant in guiding your own marketing activity, then it's probably not worth the money.

### Tactics/positioning

It's often useful to have an idea of what your competitors are up to on a monthly basis, particularly if there is change occurring in your market. A simple monthly web search of competitor websites and social media channels, with any key activities recorded in a simple spread sheet detailing type of activity and positioning, can be a great tool for keeping an eye on others in your industry. Spending one day a month on this activity can alert you to key moves of your competitors and allow you to respond quickly if required. It's also a useful internal positioning tool for the marketing function – distributing competitor intelligence reports to management teams in a very simple format helps to establish the value/worth of the marketing function.

## Channel/tactic measurement methodologies

In addition to metrics within the three categories above, you may wish to measure the effectiveness of specific channels (although caution is recommended in this approach, as often measuring individual channels in isolation does not provide an indication of whether you are achieving your marketing goals). Some suggestions for measuring the effectiveness of individual channels are below.

### Event sponsorship

Aim to collect feedback through a post-event survey - either distribute a survey to attendees following or at the event, or ask the event organiser to include a question relating to your sponsorship in their post-event survey.

*If the data is only interesting to executive teams, but not relevant in guiding your own marketing activity, then it's probably not worth the money.*

*Caution is recommended in measuring channels/tactics in isolation, as generally this does not provide any indication of whether you are achieving your marketing goals.*

## **TV**

The most common measurement of TV impact is Target Audience Rating Points (TARPs). TARPs is a term used in audience research to assess whether a commercial reached the desired audience. For example, if a TV commercial is watched by 10% of the target audience it achieves 10 TARPs. When all the TARPs for individual commercials are added up, they become Gross Rating Points (GRPs). TARPs can be useful in determining the reach of your advertising amongst your target audience (and for example can point out that often CSAs register no TARPs, hence their value is questionable).

## **Newspapers/magazines**

The publication you are advertising in will be able to provide you with readership statistics, indicating how many people were exposed to your ad. However, unlike TARPs, distribution statistics are not able to indicate how many of the viewers of the ad were actually in your target audience.

## **Expos**

It's useful to try and include a call to action at an expo, to try and reveal the value of the event by the number of relationships generated. This might be sign-up to a newsletter list for example. You could also measure the number of items that you distributed.

## **Events**

Events can be measured through simple post event surveys, and attendance rates.

## **Merchandise**

The amount of merchandise distributed or ordered can provide an indication of demand, and potentially give an indication of 'reach'.

## **Collateral**

The amount of collateral distributed or ordered can provide an indication of demand, and potentially give an indication of 'reach'.

*Often the best way to measure the effectiveness of individual channels/tactics is to build a question relating to channels into your direct response metrics.*

Often the best way to measure the effectiveness of individual channels/tactics is to build a question relating to channels into your direct response metrics. For example, if your call to action directs people to phone a certain number, the person answering the phone could ask where the caller heard of the organisation. However this is also somewhat problematic, as it is generally accepted that it takes seven 'touches' to convert a prospect into a 'sale', and it's not possible to determine what all of those seven (or more or less as the case may be) touches may have been. In addition, often the caller is not necessarily aware of where they heard of the organisation (for example in a recent World Vision campaign, many callers stated that they heard of World Vision on TV, however in that particular campaign period, World Vision was not advertising on TV).

### 4.2.3 Engaging an Agency

Research agencies are particularly useful for the collection of qualitative metrics (those related to brand awareness and brand associations for example), and can also be useful in collecting quantitative data from a large population base that you may not have access to. Below are some tips relating to the use of research agencies.

- 1 Always review\* your agencies on an ongoing basis (every six months). Some agencies can become 'sloppy' over time.
- 2 Always link any agency work back to your marketing objectives and goals – ensure that your agency is clear on your marketing goals.
- 3 Ask to see samples of an agency's past work, and if possible, talk to their past clients.
- 4 Always ask questions if you are unsure of anything.

\* Review consists of:

- Evaluation of account management (assess your account manager).
- Evaluation of creative services.
- Evaluation of media planning and buying.
- Evaluation of quality of work, pricing and customer service.
- Evaluation of overall agency i.e. achieving market objectives, understanding of client briefs.

#### What if I can't afford an agency?

*Don't bite off more than you can chew – collecting marketing metrics can take a significant amount of time, and needs to be repetitive and ongoing to allow for trends analysis.*

There are plenty of tools available for developing and implementing in-house marketing measurement programs. The only note of caution is to ensure that you don't bite off more than you can chew – collecting marketing metrics can take a significant amount of time, and needs to be repetitive and ongoing to allow for trends analysis. If you are planning to implement an in-house metrics program, make sure you allow for the time in your role, or a team member's role, to allow for collection of data on an ongoing basis.

## 4.3 Budgeting

*Aim to spend around 5% of your total marketing budget on collecting metrics.*

As with market/customer research, your first consideration in setting a budget for marketing metrics should be the value of the decisions you're seeking to influence. Marketing metrics is all about improving campaign effectiveness, so your research shouldn't cost more than the value it will have in determining whether your campaign was effective.

As a general rule, you should aim to spend around 5% of your total marketing budget on collecting metrics.

## 4.4 Check lists

Before you finalise your marketing metrics dashboard, ask yourself the following questions:

- Am I able to make actionable decisions from these metrics – will these measures give me the evidence I need to alter marketing channels or marketing investment for increased future success?
- Is the research worth it – is the cost of obtaining the measures more than the value they will have in driving marketing decisions? Remember that in some instances, the business will require you to collect metrics regardless of their value, for example for use in preparing tender documents.
- Am I collecting data within the relevant audience – are these the key markets I'm seeking to reach?
- Have I setup a metrics program that I can manage on an ongoing basis (measurement must be recurrent in order to monitor trends – ideally quarterly), or have I taken on too much?
- Have I incorporated metrics from the three key categories: brand metrics, direct response metrics and competitive metrics?
- Do I need a systematic metrics dashboard such as the Balanced Score Card to consistently monitor my marketing activity performance?

*Measurement must be recurrent in order to monitor trends.*

## 4.5 Top tips

### **Keep it simple to begin with**

If you are developing a metrics program for your organisation for the first time, start with the basics and keep it very simple. That way it will be manageable, and you can build it up over time.

### **Limit the number of metrics**

Stick to around five key metrics (or categories of metrics). More is not necessarily better. In fact, it can just make things more complicated.

### **Ensure balance**

Ensure a balance in both the type of metrics and the methods you are using to collect the metrics – avoid relying on one type of metric, or one method to determine success. Ideally, aim to collect metrics in each of the three not-for-profit metric areas: brand, direct response (by each channel if possible) and competitor. Ideally, also use both primary and secondary sources to collect your data.

### **Create a visual**

Once you have selected your key metrics, map them in some kind of visual format, to make it very simple for others in the organisation to understand how marketing success is measured. If possible, map/link them directly to your key marketing goals in a visual format.

### **Measure regularly**

Aim to take a measure of all your key metrics at least every six months, and your ongoing direct response metrics monthly, to ensure corrective action can be implemented as needed.

*Stick to around five key metrics (or categories of metrics). More is not necessarily better.*

*It's often valuable to draft a metrics report and then seek feedback from those who you will be distributing the report to, to ensure that it is relevant.*

### **When reporting, consider your audience**

Who are you preparing marketing metrics reports for? What information does your audience want? It's often valuable to draft a metrics report and then seek feedback from those who you will be distributing the report to, to ensure that it is relevant. Metrics presented to the board should reflect the reality that boards have limited time to review information. Board members are generally interested in key features (dashboards and graphs work well) and financial metrics.

### **Measure only from within the relevant stakeholder group**

If you are measuring brand awareness or brand equity, ensure that you are taking a reading from within the relevant stakeholder group. There is no point measuring brand awareness or engagement amongst the general population, or amongst existing customers. Take the time to access the relevant sample group for testing.

## **4.6 Traps and Pitfalls**

Below are some tips for what to avoid when establishing a marketing metrics program for your organisation:

### **Putting metrics into report formats that are not relevant to non-marketers**

It's important that your audience is able to easily interpret the results.

### **Collecting data for the sake of collecting data**

If you are going to invest your time in collecting marketing metrics, only collect data that will allow you to make more informed future decisions.

### **Avoiding marketing metrics altogether**

All marketing activity should be measured. Think creatively and avoid using 'too hard' or 'too expensive' as an excuse for not collecting the data.

### **Forgetting to measure internal culture**

One of a not-for-profit organisation's biggest assets is its staff – they are your passionate advocates. If they are speaking about you in one strong united voice, this can have a significant impact on the strength of your brand. Conversely, if they are speaking in a disparate voice, or if they are speaking badly of your organisation, this can significantly damage your brand.

*If you are going to invest your time in collecting marketing metrics, only collect data that will allow you to make more informed future decisions.*

## **4.7 Tools and Resources Available**

The comprehensive 'Dictionary of Marketing Metrics' on the AMI's website (members only access) may be of use in selecting metrics: <http://www.marketingvalue.com.au/Resources/dictionary.asp>

Klout measures your influence in your social networks: <http://klout.com/home>

Google Analytics is a useful tool for measuring your website statistics: <http://www.google.com/analytics/>

The Definitive Guide to Marketing Metrics, while directed to for-profit metrics, can provide some useful advice: <http://docs.cdn.marketo.com/definitive-guide-to-marketing-metrics-marketing-analytics.pdf>

Survey Monkey is a great resource for developing and distributing simple online surveys: <http://www.surveymonkey.com/>

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