



MARKETING AND BRANDING YOUR ORGANISATION

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Notes from the presentation given at the ICCCPO Workshops, Vancouver, Sept 2005

With hand-outs as Appendices

Objectives

Provide information to help you run your organisation better.

- Take up of services
- More revenue

Leave you with workable tools

Have some funs – Because marketing can be fun!

Outline

Why market? Why brand?

Some definitions

Some key concepts

Developing a marketing plan

Summary

Why Market?

The Big Irony

Marketing / branding are core, cut-through business strategies fundamental to success

YET... Not commonly defined in the Not-for Profit sector

Competition instructs the mind:

- 80,000+ charities
- 500+ have “cancer” in their name
- Universities / hospitals: Guerrilla marketing and fundraising
- An information explosion --> technology

Cut-through strategies are now in vogue!

Good marketing means creating, pricing, providing access to, and promoting, needed products / services to a target group, such that the goals of all parties are met.

Marketing in the Not-for-Profit (NFP) Sector

We don't make or sell widgets.

We provide services.. We sell caring... Our currency is hope.

We are not measured by \$ but by goals met.

Yet we need money --> we have to attract the \$, €, £, etc.

We serve two publics:

- our kids and their families
- our donors, friendsw, patrons [Enablers: help us deliver; don't receive].

Some cross-over but differing objectives and prospective outcomes.

An NFP definition: Creating and making available programmes and services that meet or exceed the needs of our children and their families, as well as our donors, such that all feel their goals are being met.

Families are helped.

You never ask for a “gift”; you help a donor achieve their personal / corporate goals.

Good Marketing Implies:

Identifying your “customers”: families + donors.

Learning all you can about them; needs and perception of benefit.

Designing programmes / services that meet benefits and not available elsewhere.

Having a good “access” or distribution plan.

Getting feedback to gauge satisfaction.

Understanding and strategising about:

1. Your programmes and services. **Product**
2. How your “customers” will access them. **Place**
3. Price points and strategy. **Pricing**
4. How to promote / advertise your organisation and its services. **Promotion**

The 4 Ps are the Marketing Mix!!

Thus: Develop a Marketing Plan!!

Some Concepts:

1: Value and Benefit

- not a 4” drill bit, but a 4” hole
- people are looking for solutions, which interprets as value and benefit
- Value: performance; availability; (price)
- Perception of value is everything

In marketing, perception is everything --> value, awareness.

2: Positioning

Perception is key; who people think you are

Paramount to own a part of the customers mind.

Positioning: The way you want your programmes / services to be perceived, relative to the needs of your target customers and the positions claimed by your competition.

Good positioning:

- simple
- focussed
- unique / differentiating (two objects cannot occupy the same space)
- better to be first than best
- translates into clever “tag lines”.

3: Branding

Like positioning, branding relates to top-of-mind responses --> an emotional response to an organisation and/or its products / services.

Response is a composite of:

- name
- personality
- profile / recognition (V.I.D)
- positioning
- reputation / track record

Need strength in all five.

4: Market Share

The % you own of the pie for your category

Can be measured many ways: money; widgets; customers; etc

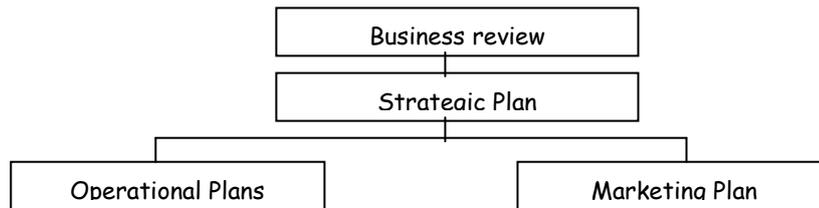
Beware the Grand Illusion: absolute \$ can go up, but share can be dropping. 0 share = 0 revenue.

Developing a Marketing Plan

We're now ready!

4 good reasons:

1. Forces focus on business strategy
2. Easier to brief new staff / volunteers / suppliers
3. Helps to justify programmes / expenses – turns Board / volunteers into stakeholders.
4. More, better satisfied families / donors, leading to better take-up and \$



Outline:

1: Background

- General
- Programmes and services
- Past Marketing Programmes

2: Objectives

3: Situational Analysis / Marketplace Issues

- Environmental scan
- Customer trends
- Competitor analysis
- Target Customers

4: Strategies

- Positioning
- Brand Strategy
- 4 Ps Strategies

5: Implementation Strategies

6: Budget

7: Timeline

8: Evaluating Success

In Summary

Marketing / branding aren't just nice to have -> they are fundamental to business success
 They're great tools to discipline your business thinking.
 There's no time like the present!!

Appendices – provided as hand-outs at the workshop

Outline Of A Typical Marketing Plan

8 Ways To Succeed In Marketing Within Your Not-For-Profit

9 Easy Steps To Developing A Winning Brand Position

Outline Of A Typical Marketing Plan
Prepared by David Stones (Candlelighters Canada)
for ICCCPPO Workshop – Vancouver- September 2005

The Marketing Plan outline below will fit most situations, but is specifically aimed at a Childhood Cancer Not-For-Profit. It is designed in a “mix and match” format, allowing users to choose the parts that best fit their needs. The flow of this Outline can also be adjusted to accommodate whatever works for a particular organization.

1. BACKGROUND

(i) General

- Provide background information about your organization: when it was founded; its Mission Statement; its Vision and Values;
- Cover past milestones, program/service launches, as well as revenue performance data.

(ii) Programs and Services

- Describe each program or service offered by your organization, and a little about its history: include any relevant statistics you may have relating to user uptake or market share (if available)

(iii) Past Marketing Programs

- If applicable, describe past marketing campaigns or efforts to truly market your organization and its programs and services; include any past positioning statements or brand analysis, as well as results;
- Past strategies can be attached as appendices.

Litmus Test: Your **Background** section should set a solid foundation for the reader. Pretend your reader is a new employee or a new member of your Board. Have you captured everything that reader would need to completely understand and appreciate the plan that is to follow? Have you set the stage adequately? You don't want to be overly wordy but neither do you want to leave out valuable information that a reader would need to understand where your organization has come from, so they can appreciate where it needs to go.

2. OBJECTIVES

- What do you want to accomplish with your Plan? What do you want the future to look like?
- It's sometimes good to imagine the future as a “willed future state,” a world that you can knowingly and proactively build. What are the features of that world? What makes it so wonderful? Write those features down and then work back the steps you will have to undertake to get you there. This is one clear way to arrive at the right objectives, rightly phrased;
- Where you can, put metrics around your objectives, measurable numbers or data that are very specific about where you need to go;
- Remember, all objectives start with an infinitive form of an active verb (“To ensure.....; To increase net revenue; etc)

3. SITUATIONAL ANALYSIS/MARKETPLACE ISSUES

(i) Environmental Scan

- What are the trends and developments within your marketplace that are affecting views/opinions and the needs hierarchy related to childhood cancer?; use any primary or secondary research available to you;
- Focus on developments and change that may affect one or more of the Four Ps (**P**roduct; **P**rice; **P**lace or distribution channels; **P**romotion) (e.g. profound increase in Internet use and the e-publications has revolutionized the public education discipline).

(ii) Customer Trends

- Outline trends that are affecting attitudes, opinions and customer responses;
- Outline any emerging customer groups or groups that requesting services or programs from your organization; remember that customer needs change over time; any needs analysis work or needs hierarchy review would be included here.

(iii) Competitor Analysis

- We use the word “competitor” loosely here, although other charitable organizations, childhood cancer related and otherwise, are certainly competitors for the donor dollar;
- Outline all you know about each main competitor: major programs; marketing strategies; fundraising techniques; etc
- Don't forget to also consider potential or future competitors.

(iv) Target Customers

- Articulate precisely who your customers are for this strategy; be as precise as you can;
- If you have undertaken any customer segmentation studies or cluster analysis, this is the place to trot it out.

4. STRATEGIES

(i) Positioning

- What do you want the customers outlined in the previous section to think about your organization, its products and services?
- What do you want their top-of-mind response to be?
- Remember: keep your positioning simple, unique and differentiating;
- Keep in mind everything you know about your competitors' positionings as you are doing this;
- Use the hand-out, *Seven Steps to Developing A Positioning Statement* as a guide to this process.

(ii) Brand Strategy

- This, combined with the "Positioning" section above, can provide many hours of strategizing and/or consultancy fees unto themselves; they can be major pieces of work;
- Key here is to decide what "personality" or "image" you want your brand to project; what personality does it project now?; do you have any studies or brand audits that can help you with this?; what do you need to do to help you project the right brand image for your organization? (e.g. visual identity is where many people start....and often end).

(iii) 4 Ps Strategies

- Strategies represent the broad strategic directions which provide the underpinnings for specific tactics (e.g. getting paediatric oncology units onside and supportive of your childhood cancer charity is a *strategy*; designing a PowerPoint show and presenting it to key decision makers at each hospital would be a *tactic*, likely one of many needed in support of this strategy);
- To the extent that you can, divide the Strategies among the 4 Ps;
- Normally, you would want four-five strategies, and no more than six.

5. IMPLEMENTATION TACTICS

- Tactics represent the actions that singly and collectively will breathe the Strategies into life;
- Again group these around the 4 Ps and simply follow along through each Strategy outlined above;
- At the end of the day, a reader should be able to see clearly how all the issues raised in S. 3, as well as all Strategies, will be addressed
- Remember under promotion to not forget that the name of the game today is to integrate your marketing initiatives with more traditional communications tools such as media, public relations and special events; these type of undertakings can do much to augment the profile achieved through paid media programs and contribute significantly to your brand strategy:
- Other activities and tools under the general heading of promotion might include:
 - Web site/Internet use
 - Brochures/posters, including a distribution model
 - Media advertising programs, likely executed through a pro bono arrangement with a local agency (print; radio; TV)
 - A magazine/periodical placement strategy for your print spots, with a focus on those publications that specifically align with your target groups
 - Possible use of transit or billboard (outdoor) advertising, again if pro bono can be arranged (many outdoor companies provide free board spots during slow business periods)
 - Announcer-read radio PSA copy that can be used year-round
 - Although very much on the realm of revenue development, a cause related marketing program with a major national company can do wonders for brand promotion and marketing (e.g. sale of a teddy bear through a national chain with all or a % of the proceeds going to your charity)

6. BUDGET

7. TIMELINE

8. EVALUATING SUCCESS

- All strategies and plans must contain an evaluation section
- To the extent that you can, build the metric goals spelled out in your Objectives directly into your Evaluation Plan.

8 Ways To Succeed In Marketing Within Your Not-For-Profit
Prepared by David Stones (Candlelighters Canada)
for ICCPO Workshop – Vancouver September 2005

Stick to these 8 steps toward marketing programs that will work for the benefit of your not-for-profit or charitable organization:

1. **Have a Strategic Plan/Business Plan:** The root of sound marketing strategy and analysis lies in having thought your business through in the first place. Developing a solid strategic plan that provides a visionary 3 -5 year outlook for your organization is fundamentally important. It makes you think through key elements such as your program/service offerings, who your “competitors” are, and who your true customers are. The Strategic Plan is a road map; the Marketing Plan is one of your key tools that will ensure that you get to your destination.
2. **Develop A Marketing Plan For Your Organization:** Don’t just talk about marketing. Don’t just tinker with some of the parts, such as promotion. If you possibly can, use your Strategic Plan as a base, take the time, make the investment, and develop a full, comprehensive Marketing Plan for your organization. Re-visit it and update it as you see fit.
3. **Appreciate Trends In The Marketplace:** Keep an eye on what’s happening in the world of childhood cancer family services, therapies, donor relations and fundraising strategy. As one example, the Internet has so changed the way that information is stored and distributed that it has fundamentally changed the service offerings of many organizations.
4. **Know Who Your “Customers” Are:** Define your “customers,” both families, children and donors, very carefully. Segment them as much as you think is reasonable. Develop profiles of them. Keep the data current. Never assume you know everything there is to know about your customers.
5. **Know what your families/donors want:** If possible, establish this through empirical research, either quantitative (e.g. surveys) or qualitative (e.g. focus groups). Understanding their perception of benefit, and keeping an eye on it, is critical.
6. **Know who else is out there:** Okay...we don’t like the word “competition.” But when it comes to the donor dollar, that’s what those other organizations offering the same or similar services are. Know who they are, how they operate, what their brand positioning seems to be and how they promote in the marketplace. Good competitor analysis is worth its weight in gold. You should also “go to school” on your competitors. Learn from what works for them and what doesn’t.
7. **Communications And Marketing Are A Good Combination:** Integrate communications tools such as media and public relations, and special event management into the Promotion side of your marketing mix. A well-placed story in a local, community newspaper can do more for one of your organization’s programs than an expensive advertising campaign.
8. **Be bold; put it all on the line:** In developing brand or positioning strategies, be careful but be bold, too. The two are not incompatible. If research indicates that you have little equity in your current visual identity, then look at changing it. Sometimes it’s not enough just to refresh a brand, you have to re-invent it. Taking that calculated risk could pay off big time.

9 Easy Steps To Developing A Winning Brand Position
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Remember the definition of positioning: The way you want your programs/services to be perceived relative to the needs of your target customers and the positions claimed by your competition. Now follow these 9 easy steps that will help you develop a positioning that will ensure a unique market position, better uptake of your programs and services, and lead to increased revenue:

1. **What needs are you satisfying?:** List the needs and wants that you believe your programs and services can satisfy.
2. **Who else is trying to satisfy these needs?:** List any other current or possible organizations that may offer these same services and therefore may be vying to meet the same needs.
3. **Why do families/donors use these services or give?:** What are families or donors looking for when they use your services or when a donor decides to support your organization? This will lead to discussion about the ways that you and other childhood cancer fighting organizations or related charities are being evaluated.
4. **How are the other guys positioned?:** Based on what you know and what you see in the market place, what positions have the other “competing” organizations chosen to occupy?
5. **Where are the gaps?:** List the possible positions that no one seems to have claimed. Be careful as to why the gaps exist. Not all programs and services or service guarantees are possible or viable. If you can find gaps, try positioning against or relative to a competitor (like Avis or 7-Up).
6. **Choose your gap and a strategy:** Evaluate each gap or opportunity. Is it attractive to your organization or doable? It might set you apart but will it resonate with your family/donor base?
7. **Adapt your marketing mix:** Check all 4 Ps, particularly Place and Product. It may sometimes be necessary to tweak actual product or service offerings to bring your delivery in line with your positioning.
8. **Design a Promotion campaign:** You need to promote the position....Look for clever ways to interpret or to translate the position in your creative and media.
9. **Learn, grow and adapt:** Positioning strategies normally need adjusting every few years. Watch your “competitors” to see how they react. You may have to respond as they recalibrate their offerings or positionings. Make sure you maintain that keen competitive edge.