



If You Promote It, They Will Come Coalition Marketing Workbook

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The Hospice of the Florida Suncoast

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Introduction

The American Marketing Association defines *marketing* as “the process of conceiving, pricing, distributing and promoting goods, services and ideas in order to create a mutually satisfying exchange between a buyer and a seller.” For end-of-life coalitions, marketing is about *finding the intersection* between what your coalition has to offer and what your community wants/needs, and *communicating effectively* with your community about that intersection.

Marketing involves an ongoing, wide range of activities used to make sure that your coalition is continuing to meet the needs of your community. These activities include

- market "research" to identify target audiences and what their unique needs may be, which of those needs you can meet, and the issues and initiatives competing for their time and attention
- positioning your coalition's products or services (finding your niche and creating a unique community presence)
- pricing (or defining the value of) what your coalition has to offer
- promoting your coalition and your activities through various strategies

By developing a marketing plan based on a solid understanding of your community and applying the right tools and tactics, community engagement can become a strategic and measurable process.

This workbook is intended to become your coalition’s marketing plan. It will grow to contain key information you need to use marketing tools effectively - to know your audience, know the media through whom you can talk to that audience and know “the competition” – the other organizations who compete for share of voice and share of mind, whether that means competing for reputation as the acknowledged best source for help at end-of-life, or for charitable time and dollars.

This workbook should become a dynamic document. The information you record here is subject to change. Use the tools and worksheets to keep your marketing efforts up to date and on target.

This is also the place to record your coalition’s institutional memory. It is inevitable that people come and go from any coalition, and because there are immense demands on your time, it’s also likely you’ll ask others to help with your marketing efforts from time to time. The information recorded in this workbook will help ensure that everyone’s time is respected and can help you avoid reinventing wheels and digging for information someone else has already found. The workbook can help you develop a roadmap every time you launch a new marketing effort. As you develop new marketing initiatives, you can look back at a record of specific efforts to help determine what led to success.

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Section I: The Marketing Audience

Targeting an Audience

Effective marketing initiatives are audience and issue specific. Before you begin any marketing effort, you should identify the audience you want to reach. It is important to consider your coalition's mission, goals and current activities in considering which audience to approach. Some questions to guide you include:

- Who is important to your future?
- Who can the coalition services help?

Everyone in your coalition is a member of various communities such as faith groups, workplaces, clubs, neighborhoods, civic groups or other communities – and so the “seeds” of potential relationships exist with those who can help carry and multiply your message . As you consider audiences you want to reach with your marketing efforts, look for your:

- **Message Multipliers** – individuals or organizations who will help deliver your coalition's message
- **Decision Influencers** – individuals or organizations who a community trusts for an opinion
- **Decision Makers** – individuals or groups who make decisions about the issues your coalition addresses

On the Marketing Contacts List on pages 2-4, list all of the organizations, groups and individuals in each category that are stakeholders in your coalition's marketing efforts. As you complete the list of contacts, place a check in the appropriate column to the right of each listing to indicate:

1. Message Multiplier
2. Decision Influencer
3. Decision Maker

Marketing Contacts List

	Name/ Contact Info	1	2	3
Health Care Providers				
Physicians				
Hospitals				
Long Term Care				
Other Health-Related Service Groups				
Faith Communities				
Social Services				
Employers				

	Name/ Contact Info	1	2	3
Senior/Aging Services (AARP, Area Agencies on Aging)				
Local Associations (ministerial, bar, disease-specific)				
Community/Public Officials				
Civic Groups				
Financial (banks, local foundations, etc.)				
Consumers and other individuals				
Academic Groups - Schools, Colleges, Universities				
Libraries				
Attorneys (estate, health, elder)				
Policy Makers				

	Name/ Contact Info	1	2	3
Other (organizations, groups or individuals)				

Understanding Your Audience

It is important to take the time to understand your potential marketing audiences. This helps you to create compelling messages and choose the most effective marketing tools. It also allows your coalition to maximize its marketing efforts to influence behavior, attitudes and/or opinions.

Review your list of contacts from the Marketing Contacts List on pages 2-4. Consider your coalition's goals while reviewing the list and decide which message multipliers, decision influencers and/or decision makers are the most important contacts for your coalition to focus their marketing efforts on (some contacts may be all three). Create a "top five" priority list of audiences (list audiences below by category, i.e. patients, family members, attorneys, clergy, physicians, etc.).

The "top five" audiences that my coalition would like to reach are:

- 1.
- 2.
- 3.
- 4.
- 5.

Then for each of the audiences listed above, complete the following profile.

- Why is this audience important to your coalition's goals?

- Why should this audience care about your coalition and the issues?

- What do you want this audience to do (i.e. create awareness, motivate to action, change behavior or attitude)?

- How will you know if you have successfully reached this audience?

Ask your coalition's members and supporters to provide a personal contact for each of the five priority audiences you listed as "targets" above. You can maintain the list of contacts and update it as changes occur. If a coalition member/partner has a personal relationship with your target audience, they should make the initial contact for the coalition. Once contact is made, the relationship can be handed off to someone with specific responsibilities, e.g. sponsorship chairs, event planners, etc. If there are companies or other organizations for which no one can list a contact, that's an opportunity to approach via a marketing department, a foundation or a community outreach department. Keep track of interactions, conversations and other communication your coalition has with all potential marketing audiences.

Researching Your Audience

Gathering information about your audience will help guide your choice of marketing tools and strategies, and help you to create compelling messages. You can start by gathering information to understand the broad audience, and then gathering more "segmented" information for target audiences. Listed below are some tips on conducting low-to-no cost informal research. Bear in mind, this type of intelligence gathering may not be as scientific as professionally executed studies. However, it can give you a sense of what's on your audience's minds, what their preconceptions about death and dying are, some insights as to how to talk about these issues, who competes for their attention and donations, where they get their information and whom they trust.

- **Written Survey** - Your coalition can create a simple written survey with a few key questions to assess audience attitudes, expectations and needs related to end-of-life care and service delivery. One possibility is to mail the survey to consumers of the services provided by organizations in your coalition. To cut costs, volunteers from coalition member agencies can help stuff envelopes, or a coalition partner can donate the cost of the mailing.
 - ✓ If you decide a written survey is what you need, remember, average response to a mailed survey is in the 2%-5% range. That means you'll need to mail in large numbers to get a reasonable response from which you can make decisions.
 - ✓ Keep it short. Try to create a survey that will take no more than five or ten minutes to complete. "Yes" and "No" or "True" and "False" answers are quick and easy to tabulate. Open-ended questions make drawing conclusions more complicated, but can yield insights beyond what yes/no can.

- **Focus Groups/Feedback Sessions** - Informal focus groups or feedback sessions provide an opportunity to hear community members discuss end-of-life issues and identify issues in their own words. Consider different methods your coalition might use to invite community members, possible locations for your session and the kind of agenda that would best suit your purposes.
 - ✓ A good rule of thumb is no more than 8 people in a focus group.

- ✓ Ask permission to record the conversation. The moderator can then focus on the group rather than taking notes. If recording isn't possible or advisable, recruit a "scribe".
- **Interviews** - One-on-one interviews can provide excellent insights, particularly when topics are sensitive. Here you'll need at least a dozen, depending on the size of the community.
 - ✓ It's a good idea to write an interview "script." This can help ensure that all participants are being asked the same questions in the same way, and makes it easier to find trends in the information you gather.
 - ✓ Keep in mind privacy issues. Always ensure your respondents, no matter what the research setting, that you will never use their names (without permission) or attribute information or a point of view to them specifically. Check with partner organizations about specific privacy rules.

The research strategies listed above can provide you with a limited snapshot of your target audience. If you are interested in conducting this kind of informal "marketing research," consider working with faith-based or social service agencies. They can help recruit their members/supporters/clients for a focus group or to complete a written survey. Work with this partner organization to strive for diversity in the audience, e.g. varied attitudes, background, social and ethnic makeup, etc. Most of all, remember that research isn't a one-time event. An ongoing program of audience research, listening and learning will help ensure that your marketing efforts in-tune with your audience's needs.

Knowing Your Audience's Media

Knowing the media sources that your audience trusts for information is a key to effective advertising, PR and events. As you gather information about the audience, find out:

- what they read
- what they listen to
- how they want to get their information
- what and whom they trust

Keep a log of the media that your audience uses and trusts and the reporters who cover your coalition's topics. This can help you choose the media outlet most likely to reach your target audience with your message. You can use the media contact log on the following page.

Media Contact Log		
Media outlet	contact names and info	department, beat or topic
Newspapers		
Radio stations		
Television Stations		
Community Publication/ Newsletters		

Media outlet	contact names and info	department, beat or topic
Community Bulletin Boards		
Websites		
Other media sources		

Tips:

- For media outlets with advertising departments, include the department contact name(s).
- Make sure to specifically note any reporters covering health, family and lifestyle topics, or other topics related to your coalition work.
- Make a note of the circulation numbers for each media listing – remember, these numbers can change so make a note of the date for circulation data. Accurate numbers are available through Standard Rate and Data Service (SRDS). This is a subscription service that is available through many colleges, universities and public libraries. If a public library near you does not subscribe, you can call SRDS at 800/232-0772 and they will contact your library.
- Bacon’s Directories provide information about editors and reporters and the beats they cover. These can also be found in many public libraries.

Section II: Message Architecture

This section is designed to help integrate the elements of your coalition's mission statement with your audiences' needs and wants to create a compelling and memorable message. Messages are the core of your marketing efforts. The specific words that you use to convey who you are and what you do are critical to the success of your coalition.

Your message is an audience-friendly statement of the benefit you bring to them and a suggestion of why to engage in your efforts. While your message relates to and stems from your mission, *your message is not the same as your mission statement.*

Crafting Your Message

To develop your core message, first begin with your mission statement.

My coalition's Mission Statement:

The following steps will help you move from mission statement to core message. When developing your core message, remember ...

1. Communicate the issue
2. Invite action – Tell them what you want them to do
3. Use the audience's language, not yours
4. Be brief
5. Be memorable
6. Be warm and friendly
7. Include "*what's in it for me*"

1. Communicate the issue

The first step in developing a message is to briefly describe why what you are doing is important to any audience.

2. Invite action

Inviting action may involve what you want to offer to people, such as resources, services or products you want them to use -- or it may involve what you want from them, such as participation in a partnership project, talking about end-of-life wishes or completing advance directives. Briefly describe the action you want people to take.

3. Use the audience's language, not yours

In order to develop an effective message for any audience, you need to use their "own words" and eliminate all jargon. Look at your mission statement and list below any words that are clearly your own internal language (for example, "palliative," "advance directives," "provider," etc). Eliminate these words from your message.

For each word or phrase you listed above, identify alternate words or phrases that could reach the broadest audience.

4. Be brief

Take what you have written under numbers 1, 2, and 3 above and try to combine them into one sentence with a minimum of punctuation.

5. Be memorable

Paint a clear picture in the audience's mind – check your language again for words that are accurate, and that also have multiple levels of meaning for a broad audience.

6. Be warm and friendly

Imagine that you are talking to a close family member. Make your language familiar & not stilted.

7. Include “*what’s in it for me*”

Focus on the benefits of what you are offering, rather than the features. For your audience, list “*what in it for me*” factors.

Now, using the seven key points above, develop your *core message*, the message that speaks to the broadest audience.

My coalition’s core message

Customizing Your Message

When communicating with specific audiences, your core message may need some customizing to meet each audience's needs and language. Use what you learn from experience and from your audience research to shape the core message for specific target audiences. You can use these audience-specific messages when creating a news release, writing an ad, giving a speech, creating brochures and other materials.

Think about the five priority target audiences you identified on page 5. How would you customize your core message for each?

Audience #1 _____:

Audience #2 _____:

Audience #3 _____:

Audience #4 _____:

Audience #5 _____:

Section III: Developing Your Marketing Plan

Once you've developed your messages, you'll need to develop a marketing plan. Marketing plans can be broad or specific. They can serve as a roadmap for an entire year and cover all the activities and programs for your coalition, or they can be initiative specific.

The foundation for your marketing plan is based on the target audience(s) identified and the research outlined in Section I. Refer to that information as you complete the following steps in developing your marketing plan:

1. Define your marketing objective/s
2. Choose the right tools and tactics
3. Coordinate your efforts
 - a. Task list for each tool and tactic
 - b. Person(s) responsible
 - c. Budget
 - d. Calendar of activities
4. Measure results

Defining Marketing Objectives

A marketing objective *focuses on the audience* and what must be done to engage them, receive their contribution, and/or enlist their support or participation. It reflects a marketing activity and addresses *who* needs to be reached, *how* that will happen and *what results* you want.

Make your objectives as specific and quantifiable as possible. This will help in creating effective, measurable objectives so that you can choose appropriate tactics to support your efforts.

Verbs that imply a marketing objective include:

Educate	Build/Create Awareness
Introduce	Invite
Register/Sign Up	Convince
Secure	Promote

Some examples of marketing objectives are:

- To *secure* X speaking opportunities in X workplace settings
- To *create awareness* of the coalition's work in X faith communities
- To *introduce* a new advance care planning tool to the community

Refer back to the “top five” target audiences and messages assigned for each. Write below your **marketing objectives** for each audience.

Audience #1 _____:

Audience #2 _____:

Audience #3 _____:

Audience #4 _____:

Audience #5 _____:

Choosing the Right Tools and Tactics

Now that you have your objectives in place, you can go on to the tools and tactics – the “how we’ll reach our marketing objective.” Your coalition should select a marketing tool based on your goals, target audiences, messages, available resources, available time and the likely effectiveness (cost-benefit factor) of the tool.

There are some basic marketing tools that lend themselves to community engagement. The *Coalition Marketing Workhorses* are

- Public Relations (PR)
A message whose content and placement are controlled by the media & whose purpose is to:
 - Create an opinion where none exists
 - Reinforce an opinion that already exists
 - Change an existing opinion
 - Educate and/or create awareness

- Advertising
A controlled message for which creation and appearance in the media is paid.

- Events
An opportunity to deliver your message face-to-face with your audience.
 - Put a face – or a hug or a handshake – on your coalition
 - Provide an opportunity to know your audience and learn from them
 - Provides both PR and advertising opportunities

Refer to the Marketing Tools Decision Grid on page 18 and the Marketing Tactics Checklist on pages 19-20 when considering which marketing tools to use.

The Marketing Tools Decision Grid

Tool	What you'll need	When to use	When not to use
<p>Public Relations (PR) Tactics:</p> <ul style="list-style-type: none"> • Press Kit 	<p>News Good writer(s) Understanding of the audience Good relationships with the media</p>	<p>Long or complicated story to tell Your side of the story needs to be told Announce or follow-up an event In tandem with advertising</p>	<p>Need to control time and/or message There's nothing new to say</p>
<p>Advertising Tactics:</p> <ul style="list-style-type: none"> • Newspaper • Radio • Television • Posters • Direct mail or handouts (flyers) 	<p>Available media outlets Good writers/designers Sufficient budget for multiple insertions</p>	<p>You need to control the message and when/where it appears</p>	<p>You have a long or complicated story to tell When credibility counts</p>
<p>Event Tactics:</p> <ul style="list-style-type: none"> • Town hall meeting • Educational forum • Speakers bureau 	<p>Good match between what you have to offer and what the audience wants Sufficient planning time Appropriate venue</p>	<p>You have someone or something that adds "star" power or excitement value You can partner with or leverage another event</p>	<p>The goal is simply distribution of materials Everyone in the coalition is over-extended</p>

Marketing Tactics Checklist

For each marketing tactic, indicate your coalition's existing and needed resources, and if the tactic is *effective* - highly likely (or known) to reach your target audience, and/or *efficient* - likely to reach large numbers of people compared to the resources expended.

Tactic	Existing resources	Needed resources	Efficient?	Effective?
PR Press Kit*				
Newspaper advertising				
Radio ad				
Television ad				
Posters				
Direct mail				
Event planning/ promotion				
Newsletter				
Flyers				
Brochures				
Other				

Tactic	Existing resources	Needed resources	Efficient?	Effective?

*** Elements of a good Public Relations Press Kit:**

- News release including “boiler plate” paragraph
- Fact sheets
- History of the coalition - plus other coalitions if necessary or appropriate
- Biographies and photos of key people
- Previously printed stories or feature articles
- Brochures from coalition member organizations
- Calendar of upcoming events - yours and others
- Position papers, research reprints, speech text
- Relevant Web sites
- FAQs
- Copies of event flyers and handouts

Coordinating Your Efforts

It’s always best to plan marketing initiatives on a 12-month basis. This will allow you to see the big picture, to coordinate with partner organizations, to leverage other events community-by-community, to control budget – and most of all, to avoid last-minute efforts by already-busy people. Planning will also help you in building a relationship with the news media -- they’ll know when to expect your events and you can also coordinate with their editorial calendar.

Make sure your marketing plan includes:

- ✓ A reminder of every deadline – three to five days in advance (particularly important with print media closing dates).
- ✓ The person responsible for each tactic and each step in its development (for a news release include the writer, the person responsible for printing and/or mailing, the person(s) responsible for “pitching” the media, the person(s) responsible for follow-up calls to the media). This will help you ensure consistency of messages, timing of tactics and to know who to call with questions.
- ✓ A month-by-month list of due dates (especially for certain marketing tools such as newsletters) so you never miss an issue or date.
- ✓ Make sure every person on each marketing tactic team has a timeline at the project initiation and as revisions are created.

The Marketing Plan Worksheet on page 22 will record the tools and tactics that support each of your marketing objectives and help coordinate your efforts. Important tip: Do not initiate work to develop any tactic until the “budget” column has been completed.

Measuring Results

Every marketing plan should have a clear description of how success will be measured. Needless to say, the best and most meaningful results are quantifiable, i.e. number of event participants, donation totals of supporters, number of advance directives completed after an initiative, etc. Below are some tips on quantifying marketing success:

- ✓ **Benchmark.** If your objective says “increase,” you should know by how much over previous levels. Look for hard numbers.
- ✓ **Set goals that are real but require some stretch.** Using the information you gather about your target audience, you can set goals and measure your achievements in realistic terms.
- ✓ **When measuring media results, look for ways to quantify responses, such as number calls to a phone number published in an ad or included in a release.** If you want to understand which media channel is working best, use a different phone number for each medium. You can also ask (and record), “where did you hear of us/event/etc” whenever you receive an inquiry.
- ✓ **“Counting clips” (outlets in which the story appeared, number of appearances, and story length) is only part of measuring how successful your news release and pitching activities are.** Also include content analysis. Did the media outlet get it right? Did they include all the important points? Were the quotes accurate?
- ✓ **Make sure you are measuring outcomes *directly* related to marketing efforts.** Clearly differentiate between your program objectives and your marketing objectives as you develop your marketing plan.

Sometimes results are not quantifiable, but are qualitative - for example, anecdotal stories of how marketing efforts reached a community (“I heard about your coalition in the newsletter”) and stories from your audience members about beliefs or behaviors changing as a result of your message. When setting marketing objectives, it is best to aim for results you can easily measure -- nonetheless, pay attention to and record qualitative information and indicate the sources of the information. You may find new marketing leads or meaningful stories that can improve your message!

Marketing Results Worksheet

1. Define the target audience
2. Review your marketing objectives (measurable)
3. Track your marketing activities
4. Measure marketing impact

Target Audience	Marketing Objective	Marketing Tactics	Outcome/Impact Measures
Employers	To <i>secure</i> 10 speaking opportunities in healthcare workplace settings	Direct mailing of coalition speakers bureau flyers to HR managers in healthcare agencies/ companies	# of employers who request presentations and number of presentations given