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Distance Learning for
Georgia Health Nonprofits

Building A Strategic Marketing Plan

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Healthcare Georgia Foundation
grantmaking for health



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Objectives

- What is a plan and why do you need one?
- How do I start or update a plan for my organization?
- What is the recommended planning process?
- What tactics and tools can be most effective?
- What is the end result



Today's Agenda

- Introduction of the topic and speaker
- Why is a marketing plan important to your organization
- Q & A
- Techniques and Tools
- Q & A
- Resources



Strategic Marketing Plan

Why do I need a marketing plan?

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Why do I Need a Marketing Plan?

- Gives a clear, actionable roadmap to strategically promote your organization

“If you don’t know where you’re going, it doesn’t matter which way you go!”

The Cheshire Cat, “Alice in Wonderland”



Why do I need a Marketing Plan?

■ Marketing is

“... the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.” (AMA)

- “...people believe that marketing is just about advertising or sales. However, marketing is everything a company does to acquire customers and maintain a relationship with them.” (Investopedia)



Why do I Need a Marketing Plan?

- Marketing covers 4 P's
 - Product or service
 - Price
 - Place
 - **PROMOTION**



Wealth of benefits

- Crystallizes and propels mission, vision
- Coordinates branding/messaging
- Educates, increases visibility
- A framework for decisions
- Benchmark performance, justify budget
- Strategy for funding



The Planning Process

- **Step 1: Research, analysis**
- **Step 2: Realistic goal setting**
- **Step 3: Target audiences**
Primary, Secondary



Audience Segmentation and Strategy

■ Segmentation

- Divide and organize an audience into smaller groups of people with similar needs, preferences, characteristics
- Remember influencers

■ Targeted marketing

- Ultimately benefits audience



Audience Segmentation and Strategy

- **Segment or not?**
 - Determine objective
- **Consider resources, research**
- **Determine segments**
- **Prioritize within a strategy**
 - Or design strategy for group
 - Customize key messages
- **Put yourself in audience's shoes**



The Planning Process

- **Step 4: Strategies**
- **Step 5: Techniques and tools**



Q&A

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Which Techniques and Tools are Most Effective?

■ Techniques

- Integration - layered channels
- Message alignment
- Highly targeted action
- Frequency
- Win-win



Which Techniques and Tools are Most Effective?

■ Techniques

- Create a mix of
 - Marketing and promotions
 - Public relations
 - Partnerships-sponsorships
 - *Optional: Advertising*



Which Techniques and Tools are Most Effective?

■ Public relations

- Relationship-based
- Third-party credibility
- Educate, inform
- Protect reputation



Which Techniques and Tools are Most Effective?

■ Public relations includes

- Media relations
- Community relations
- Patient/physician/client relations
- Events
- Employee relations
- Public service
- Writing
- Materials, annual reports



Which Techniques and Tools are Most Effective?

■ Public relations

- Media relations

- Opportunity to tell your story

- Promote 'service,' the heart factor

- Public service

- Call to action



Which Techniques and Tools are Most Effective?

■ Social media

- Exploding media channels

- LI, Facebook, YouTube, MySpace, Twitter
- Drive to website?
- Link to fundraising, brand image
- Call to action
- Promote events, news before, during, after
- Use carefully, strategically

facebook.



Which Techniques and Tools are Most Effective?

■ Funding-related

- Databases, lists
- Direct mail, email, newsletters
- Testimonials
- Celebrities
- Retail promotions, co ops
- Media promotions
- Sponsorships, corporate partners
- Other collaboration
- Website



Q&A

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The Planning Process

- **Step 6: Add timeline, budget**
 - Build on 'must do' items
 - Budget for tough times
 - Lean, mean research
 - In-kind, volunteer help
 - Research: grad students
 - Public relations: agency donation, panel
 - Prioritize programs



Cost of Various Strategies or Cost of an Effective Marketing Plan

- **Plan cost depends on:**
 - In-house and/or outsourced
 - Amount and type of research available
 - ‘Free’ expert help
- **Cost range: \$7,500 - 25,000+**
 - Focus group - Free - \$10,000
 - Branding (platform, messaging) - Up to \$20,000



The Planning Process

- **Step 7: Set evaluation, measurement**
 - Outcomes
 - How do you measure success?



What is the End Result?

- Result: Market positioning, work plan



SAMPLE MARKETING TIMELINE

	JAN	FEB	MARCH	APR	MAY	JUNE	JULY	AUG
START								
Set goals	█							
Define timeframe	█							
Assess budget, resource	█							
Contact VIPs		█						
RESEARCH								
One on one interviews	█							
Competitive review	█							
Build mktg. databases	█	█	█	█	█	█	█	
BRANDING								
Adopt messages, positioning	█							
Set logo, tagline, graphics	█							
MARKETING: MATERIALS								
Develop flyer, posters, etc.	█	█	█					
Develop, print premiums	█	█	█					
Design email template	█							
MARKETING: TECHNOLOGY								
Design email template	█							
Revise website	█	█	█	█				
Friend e-newsletters	█	█	█	█	█			
MARKETING: PROMOTIONS								
Contact potential partners	█	█						
Set retail arrangement	█	█						
Publicize promotion	█	█	█					
Hold promotion				█	█			
VOLUNTEER RECRUITMENT								
New friend campaign	█	█	█					
Volunteer training		█	█					
MEDIA RELATIONS								
Develop press kit	█	█						
Set story lines	█	█	█					
Contact media	█	█	█	█	█	█	█	
SPECIAL EVENTS								
Identify donate d venue			█	█	█			
Prepare VIP, logistics				█	█	█		

What Not to do....

- Not involve your CEO, board chair at start
- Not share up and down chain
- Not understand your customer
- Go off brand, brand strategy
- Send mixed messages
- Think one-off's are fine, “cheaper”



Resources

- **Ken Bernhardt, Professor of Marketing, Robinson College of Business, Georgia State University - columns:**
<http://robinson.gsu.edu/news/bernhardt/index.html>
- ***Selling the Invisible* by Philip Kotler and Alan Andreasen**
- ***The Tipping Point* by Malcolm Gladwell**
- ***A New Brand World* by Scott Bedbury with Stephen Fenichell**
- ***Discovering the Soul of Service* by Leonard Berry**
- ***Counterintuitive Marketing: Achieve Great Results Using Uncommon Sense* by Kevin J. Clancy, Peter C. Krieg**
- ***Hitting the Sweet Spot* by Lisa Fortini-Campbell Ph.D.**





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