Fundamentals of non-profit marketing and social marketing: Strategies that change attitudes and behaviour

Presented by:

Jim Mintz
What we do

Revenue Generation
Social Media Engagement
Social Marketing
Sponsorships /Partnerships
Organizational Branding
Integrated Marketing
Communications
Marketing takes a day to learn. Unfortunately it takes a lifetime to master

Phil Kotler
What are the five most important things that a marketer needs to take into consideration when developing a marketing strategy?
What is Marketing?

"If a young man tells his date she's intelligent, looks lovely, and is a great conversationalist, he's saying the right things to the right person...that's marketing. If the young man tells his date how handsome, smart and successful he is -- that's advertising. If someone else tells the young woman how handsome, smart and successful her date is -- that's public relations."
- Determining your USP
- Defining your clients
- Delivering compelling communications
- Effective program / service delivery
- Adding value to the client experience
- Launching innovative programs
- Effective pricing
- Measuring results for improvement
marketing must be holistic
Marketing is much more than promotion, advertising, communications or public education...
What are the Benefits of Adopting a Marketing Approach?
• Presents comprehensive, integrated & innovative approach in transforming an organization

• Improve levels of client satisfaction and service to your clients

• Assist in attraction of resources

• Helps to make better resource trade-off decisions

• Can be used to improve uptake for fee-based products and services
• Enhancing your image and brand

• Building your reputation through public relations

• Providing a performance measurement framework

• Navigating your organization through difficult change management and gaining support from stakeholders
Marketing ...
Why now? Why should you care?
a process and set of tools wrapped in a philosophy for helping an organization do what it wants to do.
List 5 marketing activities or functions that are important to a non-profit organization?
Marketing in Public and Non Profit Sector

• Revenue generation, alternative revenue strategies through sponsorships and commercial partnerships
• Defining what product/program/service organization can offer to its clients
• Developing pricing strategies for organization’s products and services
Marketing in Public and Non Profit Sector

- Getting customers/clients to buy or use programs/products/services
- Advocating policies to key stakeholders
- Training staff to be client friendly
Marketing in Public and Non Profit Sector

• Providing a framework and systematic approach to:
  • Researching needs
  • Setting objectives
  • Planning to meet objectives
  • Adoption of formal controls to ensure that objectives will be achieved
Marketing in Public and Non Profit Sector

- Executing integrated marketing communications campaigns:
  - direct/database marketing;
  - advertising, promotional activities
  - on-line marketing/social media/digital engagement
  - event marketing, exhibiting/trade shows
  - public relations/publicity, education materials, print, videos, DVD’s CD’s etc.
Marketing in Public and Non Profit Sector

• Executing attitude/behaviour change campaigns
  – social marketing
  – public education
  – outreach
BEST PRACTISES

1. Top-down strategic vision and outcomes that are translated into working terms at all levels
2. Client-driven approach
3. Programs / services segmented and promoted by audience
4. Prioritization of activities based on need or opportunity
5. Greater linkages between departments
6. Integrated marketing communications
7. Marketing that’s focused on results
8. Use of the web as an engagement tool
9. Marketing training for managers and line staff
10. Branding that lives up to its promise
Marketing has come to mean aggressive promotion BUT emphasis should be on aggressive listening to clients & stakeholders

Need to start marketing process by asking who are our clients and what are their needs and wants
Focus on client and not itself
Not bureaucratic
Rely heavily on mktg. research
Focused on integrated programs
Bias towards segmentation
Define competition broadly

Characteristics of Client-Centered marketing
Focus on branding & positioning
Sustainable for the long run
Strategy before tactics
“Big Picture” thinking
Commitment to Planning
Strategies involve all 4 p’s
Committed to measurement of both outcomes & outputs
Willingness to take reasoned risks

Characteristics of Client-Centered marketing
Marketing Challenges

- The need to “Do More for Less”
- Need to improve communications and services
- Changes in on-line strategies and new techniques in digital engagement
- Audience relevance is changing
- Changing revenue models for non-profits
Are you anticipating the changing landscape and developing innovative marketing strategies to move your association to the next level?

Do you have the marketing processes, tools and techniques in place to meet the challenges you face?
Exercise: Check your Marketing Vital Signs
<table>
<thead>
<tr>
<th></th>
<th>You know you are a Marketing driven organization when...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You do not use terms like “general public” when referring to your target audience</td>
</tr>
<tr>
<td>2</td>
<td>“Plan” is more than a four letter word</td>
</tr>
<tr>
<td>3</td>
<td>All marketing activities are coordinated and integrated into an overall plan</td>
</tr>
<tr>
<td>4</td>
<td>You focus on results and NOT process and politics</td>
</tr>
<tr>
<td>5</td>
<td>Your organization takes “risks”, although ensuring they are “reasoned risks“</td>
</tr>
<tr>
<td>6</td>
<td>You do not keep doing the same things every year i.e. programs, services, products</td>
</tr>
<tr>
<td>7</td>
<td>Marketing campaigns consistently meet their goals and objectives.</td>
</tr>
<tr>
<td>8</td>
<td>You take action when results are not achieved</td>
</tr>
<tr>
<td>9</td>
<td>You have a clear understanding of the needs of your target group(s)</td>
</tr>
<tr>
<td>10</td>
<td>You have a dedicated marketing budget</td>
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<tr>
<td></td>
<td>You know you are a Marketing driven organization when...</td>
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<td>--------------------------------------------------------</td>
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<tr>
<td>11</td>
<td>Your organization’s brand has value</td>
</tr>
<tr>
<td>12</td>
<td>Reinventing the wheel is not standard operating procedure</td>
</tr>
<tr>
<td>13</td>
<td>Your organization is focused on “outcomes” not “outputs”</td>
</tr>
<tr>
<td>14</td>
<td>Evidence-based decision making is in your organization’s vocabulary</td>
</tr>
<tr>
<td>15</td>
<td>Strategic alliances/partnerships are a key component of your marketing activities</td>
</tr>
<tr>
<td>16</td>
<td>Your marketing objectives are SMART (Specific Measurable, Attainable, Realistic and Time Limited)</td>
</tr>
<tr>
<td>17</td>
<td>Your organization does not use the web as a warehouse to store information</td>
</tr>
<tr>
<td>18</td>
<td>You value training in areas like marketing and communications</td>
</tr>
<tr>
<td>19</td>
<td>Performance measurement is something that your organization does regularly</td>
</tr>
<tr>
<td>20</td>
<td>You are up to date with the latest trends, technologies in the area of marketing and communications, especially digital marketing</td>
</tr>
</tbody>
</table>
**You know you are a Marketing driven organization when...**

<p>| | |</p>
<table>
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<tr>
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<tbody>
<tr>
<td><strong>21</strong></td>
<td>Branding is more than a visual identifier</td>
</tr>
<tr>
<td><strong>22</strong></td>
<td>You are open to change</td>
</tr>
<tr>
<td><strong>23</strong></td>
<td>You see the need to understand your “competition”</td>
</tr>
<tr>
<td><strong>24</strong></td>
<td>You use all the elements of the marketing mix (4 p’s) and not just use promotion</td>
</tr>
<tr>
<td><strong>25</strong></td>
<td>Your organization believes that the ultimate objective for marketing is not education and creating awareness but <strong>behaviour</strong> change</td>
</tr>
</tbody>
</table>
–20 – 25: You have the tools, processes and culture in place to be successful and sustainable
–15 – 19: You are on the right path, but need to examine those areas where you are weak
–10 – 14: You are likely struggling and need to take a serious look at priorities and processes
–6 – 9: You are on the borderline of existence
–0 – 5: You need to start over
Don’t Jump!
• CEPSM/Phase 5 studied close to 600 organizations assessing the health of marketing in the public and non-profit sectors in Canada.
Rating of Public and Non-Profit Organizations Based on Key Marketing Health Indices

- Culture
- Organization
- Planning
- Management
- Knowledge & Skills
- Marketing Information & Measurement
- Resources
- Results & Outputs

Index Rating

Non-Profit Sector (n=275)  Government Sector (n=300)  Total (n=575)
State of Marketing in the Public and Non-Profit Sectors
• We have established that marketing is an important function for non-profits.
• Our study indicates a bleak picture of the overall marketing health for both sectors.
• What can be done to improve the situation?
• Initial resistance gave marketing a late start; however, recognition that qualified applications of marketing can make a significant impact.
• Need to meet challenges associated with demands for improved service delivery with budgetary constraints
• Marketing presents a comprehensive, integrated and innovative approach in transforming an organization.
• Improve levels of customer satisfaction
• Assist in attraction of resources
• Help an organization define its distinctive competencies.
• Offers an organization a framework from which to work.
• Strategic marketing, segmentation and other concepts can be applied to improve the impact of programs, products and services.
• Marketing techniques can be used to help make better resource trade-off decisions
• For fee-based products and services, product/service marketing can be used to improve uptake
• Social marketing can help to change attitudes, values and behaviour for collective well-being
Why do new products and services developed in Public Sector and Non Profits fail?
Idea pushed with lack of supporting evidence
Poor organizational systems for evaluating and implementing ideas
Poor market size measurement, forecasting, and market research
Poor planning, positioning, segmentation and budgeting
“Tactics without strategy is the noise before the defeat.”

Sun Tzu 6th century BC Chinese General
Marketing Plan Puzzle
A Marketing Plan should answer the following questions:

1. What are the target market(s)?
2. What are the key segments within these markets?
3. What are the needs of each market segment?
4. Who are the key clients, stakeholders, competitors and potential partners?
5. What is the organization's mission?
6. What “business” do stakeholders/clients think the organization is in?
7. How much interest or awareness does the organization's activities generate?
8. How satisfied are the current clients and stakeholders with the organization's output?
A Marketing Plan should answer the following questions:

9. What are the major strengths or weaknesses that could either limit or enable expansion?
10. Where are the opportunities to excel?
11. What opportunities are presented that will enable an expanded resource base?
12. What specific steps must be taken to capitalize on the opportunities?
13. What benefits does the organization have that will allow a different position from others in the field?
14. Are there segments “open” from competition that would allow the organization to excel*?

* Source: Successful Marketing Strategies for Nonprofit Organizations, Barry J. McLeish
GUIDE TO BRANDING IN THE PUBLIC AND NOT-FOR-PROFIT SECTORS

Harnessing the Mobile Revolution
Social Marketing
Social Marketing
Social Marketing
Social Marketing

What are the Benefits of Adopting a Social Marketing Approach?
Benefits of Social Marketing

- Comprehensive integrated innovative strategic approach
- Integrate and coordinate other components
- Make better resource decisions
- Assist in attraction of resources
Benefits of Social Marketing

- Executing integrated campaigns
- Building your reputation with stakeholders
- Providing a performance measurement framework
Social Marketing is a Way of Thinking
Our world is changing rapidly...

Technology     Health     Demographics     Social Values     Economics
Environment
Social Marketing provides a strategic approach for dealing with these changes…
Social Marketing

Who is doing Social Marketing to change peoples attitudes and encourage behaviour change?
• Barrier of introducing "performance based culture"
• Conflict with core values
• Requires significant management support and time
Social Marketing Issues

- Public scrutiny
- Extravagant expectations
- Non-existent or negative demand
- Non-literate target audiences
- Highly sensitive issues
- Behaviors with invisible benefits
Current State

Desired State

Strategic Gap
Filling the Strategic Gap:
Using a social marketing approach will help move target audiences through the Stages of Change over time and help bring target audiences closer to desired state.
Meaningful Impact Takes Time

• Only long-term efforts (3 to 5 years) produce measurable changes
• Sufficient investment, measurable goals, differentiation from other initiatives, strategic and creative approach, continuity in message
• Phased approach
Introduction to Social Marketing Planning

A proven planning process to developing a customized and structured social marketing plan for your organization.

Session Leader:
Jim Mintz,
Managing Partner, CEP SM
“It’s easy to make a buck. It’s a lot tougher to make a difference”.

- Tom Brokaw
Name 3 specific actions you are going to take in the next 6 months to improve the marketing of your organization?
Resources

CEPSM Guide to Branding in the Public & Non-Profit Sectors
An step-by-step guide to the strategic branding of public sector organizations based on best-practices around the globe.

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My suggestions!

Recommended Books
“Marketing is not an event, but a process . . .
It has a beginning, a middle, but never an end, for it is a process.
You improve it, perfect it, change it, even pause it. But you never stop it completely.”

Jay Conrad Levinson
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