

Situation

- The organization has been strengthening the community as a vital, program-rich nonprofit for 35+ years by engaging and supporting people who live there
- The organization has over 1,400 active donors and more than 5,000 program participants with more than 250 programs
- Several constraints exist, including a small staff, limited funds, a limited volunteer base and a relatively small donor base
- The organization has engaged in other strategic planning sessions with mixed results and some poor recommendations that ultimately had a negative impact
- This time the organization needs a unique plan with the execution tailored to match their dynamic culture

Objectives

- Develop a strategic marketing plan to achieve the following:
- Determine the best new audiences to target for acquisition
- Continue to sustain current programs and outreach
- Target marketing efforts toward increasing efficacy and reducing ongoing marketing costs
- Develop a framework for marketing campaigns
- Target an increase in donations and membership

Approach

The process employed included a mix of internal and external reviews, coupled with:

1. Strategic review
 - Evaluate mission and vision and assess current value proposition(s)
 - Audit marketing / donor / program materials
 - Segmentation work
 - Marketing and social media audit
2. Define customer target segment
 - Assess systems and databases
 - Audit hardware and infrastructure
 - Assess processes and potential for automation and streamlining
3. Market research
 - Conduct competitive scans
 - Determine marketplace differentiation
4. Conduct donor / participant target study
5. Draft, review and select initiatives
6. Develop high level plan and recommendations

Results

- The organization moved all data into a CRM system where it can digitally manage and market programs and services more efficiently and effectively
- More than \$40,000 per year was saved by reducing printed catalogs (phased out over a 3-year period)
- A new website, with online registration and scheduling, reduced the staff's time spent planning and handing paperwork by more than 100 hours each quarter
- Grant applications increased by 30%
- Online donations are on pace to increase by 30 times over the previous year
- Additional staff funding and internships increased available staff hours