How to Increase Nonprofit Revenue with a

MARKETING PLAN



yodelpop

Presenter Jackie Lalley

Co-Founder & Partner at Yodelpop

- Yodelpop co-founder and partner
- Former nonprofit communications director
- Focus: achieve growth through communications integrity





Yodelpop partners with organizations to increase their reach and revenue with marketing, because we share in the vision to build a better world. We use world-class growth technology and have in-depth experience putting it to work for nonprofits.

We are a proud Bloomerang partner agency!



Session Agenda

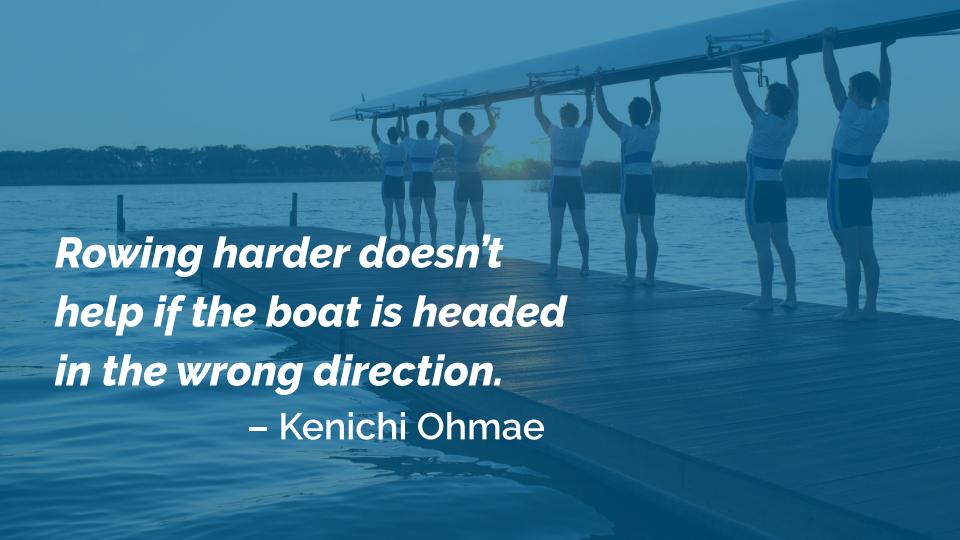
How to Increase Reach and Revenue with a Nonprofit Marketing Plan

- Why Create a Marketing Plan?
- ⇒ Establish Goals
- ⇒ Create Personas
- ⇒ Create Gameplan

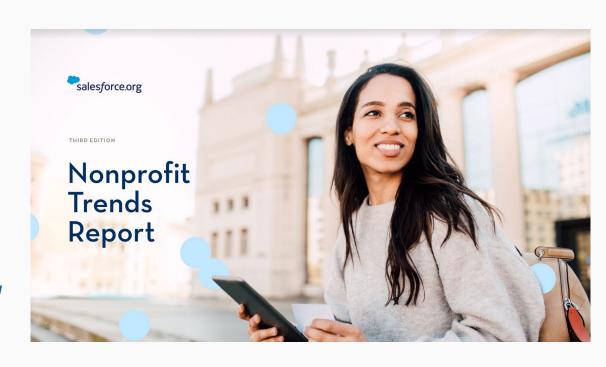
Why Create a Marketing Plan?

Benefits of creating a marketing strategy ahead of tactics

- Set and achieve marketing goals that support your organization's budget
- Increase your organization's reach and brand awareness
- Use your content to get found by the people who are ready to engage with you
- Create momentum and ongoing stability with your organization's marketing strategy
- Create delight and alignment across your organization's internal stakeholders

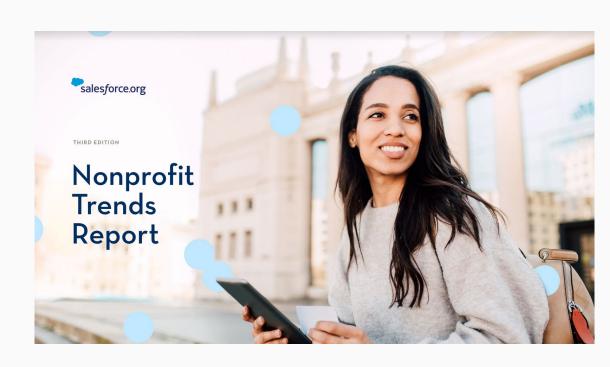


High **digital maturity** (leading) nonprofits were nearly **twice as likely** to say that revenue from foundations increased during the pandemic.



Digital maturity=

An organization's ability to leverage data to inform decision-making, reach new audiences. personalize communications, and forecast fundraising income



"We are up [in fundraising] **26% over two years ago**. It's not about PR...it is really about a **marketing plan**, and implementing that marketing plan"

- Jennifer Goodsmith, The AMA Nonprofit and Cause Marketing Conference, 2021.



VP of Mission Advancement The Anti-Cruelty Society

As nonprofits were forming their plans and budgets for 2021 in anticipation of the world economy **reopening** amid great uncertainty, over half of the respondents did not have a formal digital marketing plan



Gameplan Step 1:

Establish Goals

The marketing goals crosswalk

The marketing goals crosswalk is the intersection between your organization's objectives and the marketing goals needed to achieve those objectives.



Why work through the marketing goals crosswalk?

- ✓ Align your mission, budget and goals
- ✓ Align stakeholders with common objectives & goals
- ✔ Build a scalable and sustainable, marketing & sales plan
- ✓ Sales & marketing alignment (MROI)

Marketing Crosswalk Agenda

- 1. **Understand** the organization's specific objectives for the coming year
- 2. **What if...?** How does achieving or not achieving goals affect the organization?
- 3. Analyze current marketing activities and spend
- 4. **Determine** results of current marketing efforts
- 5. **Calculate** SMART marketing goals
- 6. **Set** goals
- 7. **Resources** needed to achieve goals

1. Understand the organization's objectives

What are the organization's **objectives* for the coming year** that require marketing in order for them to be achieved?

SPECIFIC

NON-SPECIFIC

Objective: fill in goal type

here:: _____

[e.g., Revenue goal or number of people (attendees, donors, etc.)]

[Fill in goal here]

Homework:

Research and fill in specific goals if not yet known

Objective: fill in soft goal here:

[e.g., expand awareness or impact)]

Homework:

Translate soft goal to specific goal

Copy slide for each additional objective

2. What if...?

How does achieving or not achieving goals affect the organization?

Fill in

What if we DO achieve our goals?	What if we do NOT achieve our goals?
[e.g., Serve x more program participants, hire a staff person]	[e.g., Reduce number of program participants by x, lose a staff person]

3. Analyze current activities

Fill in

Common examples - use what applies and add additional as necessary:

- Email marketing
- □ Content
- Social media
- Advertising
- Website updates / development

3a. Analyze current marketing spend

Fill in

Common examples - use what applies, replace / add additional as necessary:

Vendors / contractors >>	
Social media advertising budget / PPC >>	
Web hosting	
CRM	
Email marketing platform	
Marketing automation	
Fundraising / membership platform	
Integrations	

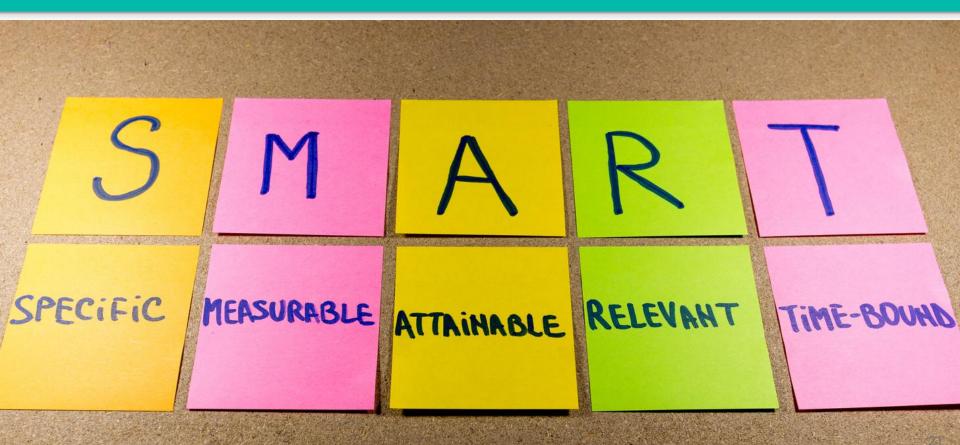
4. Determine current results

Fill in

These are the benchmarking metrics required to effectively set new marketing goals

"Customers" per month >>	
Traffic per month >>	
Leads per month >>	
Visitor-to-lead conversion rate >>	
Lead-to-"customer" conversion rate >>	

5. Calculate SMART Goals



5a. Examples marketing goal targets

- ☐ Increase blog subscribers
- Reach more visitors with organic search traffic
- ☐ Improve the mobile traffic conversion rate site-wide
- ☐ Increase email list contacts
- Increase visitor-to-lead conversions
- Boost average monthly open rate
- ☐ Enhance social media engagement
- ☐ Increase leads from advertising

5b. Calculating marketing SMART goals

Using the crosswalk, we can calculate marketing goals from the organizational objectives.

Traffic and **conversion** are a good place to start as foundation for key performance indicators as the marketing program evolves.

Here's an illustration of how we start the process.

Calculate Customers >>	Average revenue per customer =	Revenue goal
	XXX —	XXX
Calculate Leads >>	Current lead-to customer conversion rate =	# of Customers
	X.X%	X.X %
Calculate Traffic >>	Current visitor to lead conversion rate =	# of Leads
X.X% →	X.X% →	X.X%

5c. Sample traffic & conversion calculation worksheet*

Enter current data in white boxes	Marketing Goals Calculator	Enter current data in white boxes	Enter goal in white box		Enter goal conversion rates in white boxes
Yearly Current	Type of Data	Monthly Current	Monthly Goals a current conversion		Monthly Goals a target conversion
12	Customers/month	1.00	4	OR	4
	Traffic/month	292	1168		2909
	Leads/month	7	28		80
	Visit > Lead %	2.40%	2.40%		2.75%
	Lead > "Customer" %	14.29%	14.29%		5.00%

*Worksheet included with template

We use a worksheet to help us with the calculations.

In this final column we can adjust conversion rates for balance. These rates become target KPI's as well.

6. Set inbound marketing goals: Year 1

Use your calculations to document the goals clearly for key stakeholders.

Examples:

- Traffic: X sessions per month from [current benchmark of __]
- New contacts: X% increase from [current benchmark of __] per month
- Improve visitor-to-lead conversion rate by x% from [current benchmark of __]

If you don't have current data, build in an analytics period so you have something to benchmark with

7. What resources we'll need to to achieve our goals

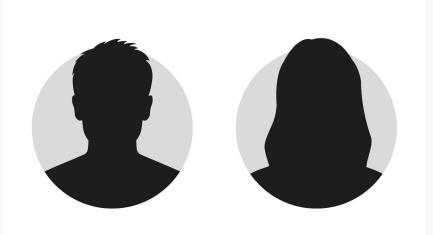
Equivalent of X marketing people >>	
Social media advertising budget / PPC >>	
Web hosting	
CRM	
Marketing & sales automation	
Fundraising / membership platform	
Integrations	

Gameplan Step 2: Prepare Ideal Personas

Ideal Personas

An essential foundational asset for inbound marketing is are **buyer persona** (supporter / donor / member) profiles.

Personas are critical to set a solid foundation for your marketing, sales and development efforts.



Get started with our Nonprofit Persona Template

PERSONA #1 | Unique Name

Additional Persona Identification As Needed:

Use this area if more information is required here.

DEMOGRAPHICS & ROLES

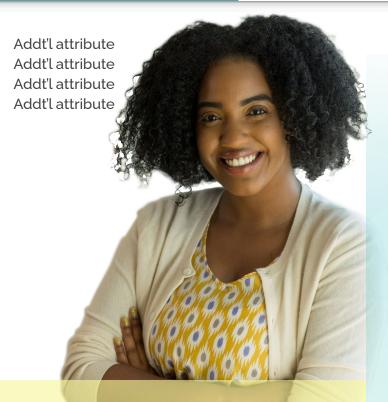
- Age
- Education
- Lifestyle / location
- Roles

GOALS

- Persona's primary goal
- Persona's secondary goal
- Additional goals, either personal
- Or professional

CHALLENGES

- Persona's primary challenge
- Persona's secondary challenge
- Additional challenges
- Additional challenges



How We Help

"Quote that illustrates problem solved"

- o Offering unique industry-relevant content as well as helpful information to this persona.
- Educating this persona on.
- Providing a professional network of peers and experts, including opportunities to learn from and a resource others.
- Advocating the value of the role of the professional medical writer, with member recognition, awards, & position statements.

[CLIENT] MARKETING GOAL: MAIN MARKETING GOAL FOR THIS PERSONA

What will be the primary goal of marketing that will best target this particular persona

PERSONA #1 | Unique Name

Additional Data Slide

IDENTIFIERS:

- People person
- Attuned to etiquette/protocol
- Career-focused
- Prefers order
- Results-driven
- Attends events 1-2 times/week
- Not tech-savvy, relies on IT staff
- Reader/traveler
- More direct communicator

COMMON OBJECTIONS:

- Another firm is bigger, has high-level experience with big clients doing PR
- Prove it. Show me the ROI
- We can do it in-house
- Our work is hard to understand, can you "get" it?
- We need it faster than you can do it
- Our data is scattered and you can't
- access it
- You haven't done it for us before, I'm going to go with one I've used before
- (trust)



WATERING HOLES:

- Nonprofit journals, blogs, and social media feeds
- Industry-related websites/academic
- Articles forwarded by ED
- NPR and local/national news, read NYT
- Local ethnic/community press

A DAY IN THE LIFE

- Works long hours 6 days/week
- Works evenings on his laptop
- Driven by results
- Makes quarterly visits to grantee sites
- May not have the best/most efficient company technology

Real Quote : "Quote from actual stakeholder"

Gameplan Step 3: Map Activities

The Gameplan uses the Inbound Marketing Methodology

Inbound marketing:

- Puts the human first
- Is about attraction rather than promotion
- Aims to solve for our audiences' needs and challenges.
- Focuses on attracting the right visitors, then cultivating relationships with them through meaningful content.
- Requires moving beyond a simple website and an outdated sales funnel model
- Results in exponential growth worth the effort
- Based on the momentum of the flywheel mechanism

The Flywheel



Marketing phases:

- 1. Attract
- 2. Engage
- 3. Delight

Customer phases

- 1. Strangers
- 2. Prospects
- 3. Supporters
- 4. Promoters

Inbound Marketing Activity Examples

Attract Visitors

- Publish Content
- Promote on Social Media
- PPC Ad Campaigns
- Social Ad Campaigns
- Popup Forms



Engage

- Downloadable Content
- Calls-to-Action
- Email Marketing
- Personalization
- Segmentation
- Social Engagement
- Chat / Chatbots
- Sales Processes / Tools / Content

Delight

- Email Marketing
- Social Inboxes
- Exclusive Content
- Attribution Reporting
- Knowledge Base
- Service

Planning Inbound Marketing Strategic Activities

Inbound marketing activities to support your marketing goals

- 1. Content Strategy
- 2. Email Marketing
- 3. Social Media Strategy
- Digital Advertising
- 5. Analysis & Optimization
- 6. Sales & Marketing Alignment

Content: The Heart of a Digital Marketing Plan

The foundation of inbound marketing centers around creating content that speaks

uniquely to your audience and different

stages in the their journey.

Types of Online Content



Pillar pages

Blogs

Social media posts

Free tools & resources

Infographics / videos

Webinars & podcasts

Calculators

Reports

Fact Sheets

Explainer Videos

Personalized content

Case Studies

Testimonials

Product video / demo

FAQs

Behind the scenes

Welcome guides

Onboarding content

Facebook Group

Exclusive Content

Exclusive Offers

Pillar Pages & Topic Clusters

Core topic, optimized for SEO: pet parent



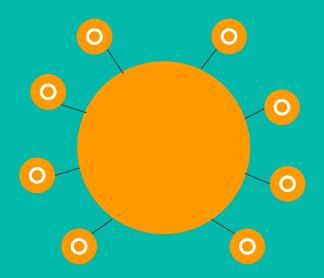
Pets bring happiness and love to our lives. Studies from the Human-Animal Bond Research Institute show that caring for a pet has numerous physical and mental health benefits, as well as positive effects for older or aging adults. Adding a pet or companion animal to your family can:

- Help alleviate stress, worry, and depression
- Encourage regular activity
- · Combat loneliness and reduce pain and discomfort

This guide will help you prepare for your life as a pet parent. It will cover topics including setting up their new environment, learning how and where to start your search, and providing an overview of what your new dog or cat will need to be a happy and healthy pet, and into their final stage of life.



Pillar Pages & Topic Clusters





Keeping pets happy and healthy are our biggest jobs as pet owners and as the humans in their lives. Although pets are not able to verbally express themselves when they aren't feeling well, pet parents may notice a difference in their dog or cat if they are in pain or experiencing distress.

How Proper Timing Can Save Money

03/23/2021 SHARE & W 25

It may be tempting to wait until your pet's symptoms worsen to avoid a big veterinary bill. However, many times waiting too long can lead to higher bills and may put your pet at greater risk of pain and even death. Veterinarians can offer a range of recommended treatment plans to create less stress during what can be an anxious time. This helps pet parents to make smart financial decisions while also prioritizing their pets' care.

Most often, veterinarians will offer "gold standard" care options first, which include all the recommended tests that can best pinpoint the problem. It's easiest to make an accurate diagnosis with the proper tests. Sometimes the cost of those tests might be more than you can afford. Tell your veterinarian if you need to preserve your budget for what might be the most likely cause of what ails your pet so that you can pay for treatments that might help. If you follow those treatment plans exactly and they don't work, then you'll need to come back with your pet for another yet visit.

It's best for your budget to stick with one veterinary clinic for your pet's problems. Switching veterinary clinics can lead to higher costs since another clinic may ask to repeat tests for a recent health problem, which might not be needed if you stay with the same clinic.

There may also be payment options or programs available to help with these costs:

- Pet insurance allows you to find coverage that best fits the needs of your family. You can search the NAPHIA website to view many options from which to choose, including Cleveland-based Embrace Pet Insurance.
- The CareCredit program which, after a short five-minute application process, allows you to break down your payment into six monthly installments. You must pay on time or risk heavy fees.
- Find a veterinary clinic that has agreed to accept Youchers as payment from our One Health Family Members.

When in doubt shout your net's health reach out to your local outering in and and their solving. They may solving a visit is at to

Premium Content

Lead conversion

Create middle and bottom of the funnel offers to help advance prospects through the consideration and decision stages of the buyer's journey.



Pet Parent's Guide to Caring for Your Dog or Cat

Be a Great Pet Parent

Being a pet parent is hugely rewarding - and a big responsibility.

Animals bring happiness and love to our lives, and living with pets has positive effects on our mental and physical health.

This 11-page guide will help you care for your dog or cat. You'll find tips on:

- Navigating choices and costs of veterinary care.
- Creating the best environment for your pet.
- . Tips on housing and future moves.

If you've ever wondered what it takes to be a great pet parent, this helpful resource can help you answer some common questions. You'll learn what to consider when adding a pet to your family, how to find a pet that suits your living situation and lifestyle, and how to care for a pet once you've brought one into your life.

Download A Pet Parent's Guide to Caring for your Dog or Cat today. And congratulations on taking this important step.





		_	- 3	•	۰	
SH		1		•	7	

Pets & People, Healthy at Home.





What is a content mission statement?

 A content mission statement, similar to the organization's mission statement is they 'why' behind why your organization is creating content.

What do we need a content mission statement?

- Determine why before what
- Set the tone for your entire content marketing strategy
- Ensure alignment and purpose between marketing and business / mission

Our mission is to [fill this in],

but when it comes to our content strategy,

it's not about doing that, it's about the idea that

everyone should know how to: [fill this in]



A customer journey map is a visual representation of the process a customer or prospect goes through to achieve a goal with your organization.

With the help of a journey map, you can get a sense of your prospects motivations -- their needs and pain points.



AWARENESS

The buyer realizes

CONSIDERATION

DECISION

DELIGHT

Blogs Free tools & resources Infographics / videos

The buyer defines their problem and researches options to solve it.

The buyer chooses a solution.

> **Mapping** content

The buyer becomes an advocate. promotes, and continues to buy.

Pillar pages

they have a

problem.

Social media posts

Webinars & podcasts

Calculators

Reports

Pricing & Packages

Explainer Videos

Personalized content

Case Studies

Testimonials

Product video / Demo

Whitepapers

FAQs

Behind the scenes

Welcome guides

Onboarding content

Facebook Group

Exclusive Content

Exclusive Offers

PERSONA

LIFECYCLE STAGE & ACCOMPANYING ASSETS

Persona Name

Donor Debi

Problem or opportunity that the above persona needs help with:

Wants to feel like she's making a difference, make sure pets (which she loves and can't have as many as she'd like) to have access to vet care and allow people to stay connected to pets

AWARENESS

Has realized and expresses symptoms of potential problem or opportunity

CONSIDERATION

Have clearly defined and given a name to their problem or opportunity

DECISION

Have defined their solution strategy, method or approach

DELIGHT

Continuing to look for efficacy and value added to their experience of the brand / solution

Pet Health Blog

New Website

Our Programs

Sample org's mission is to help pet owners in need get veterinary care.

Impact Report

Video Stories / Vet Interviews

Pet voucher recipient success stories

Pet Gazette E-newsletter

Video Testimonials

Five Ways to Give

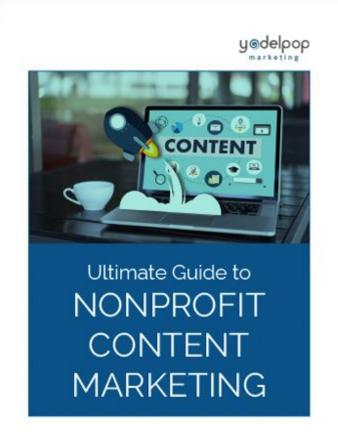
Streamlined Donation
Process with
Givebutter Integration

Webinar About How to Get Involved

Events

Community

Leadership Opportunities



Recommended Resource:

Nonprofit Content

Marketing Pillar Page

yodelpop.com/ ultimate-guide-to-nonprofitcontent-marketing

Connect & Engage

Email Marketing

Connect & engage

- Regular content email (enewsletter) subscription
- Lead nurturing sequences
 - Nurture leads through funnel
 - Providing relevant content and offers along the buyer's journey.
- Special promotional emails



Pets & People, Healthy at Home.

Hello there!

Welcome to the August Healthy Pet Gazette.

I'd like to declare August "Be Kind to Pets and Veterinarians" month. We just heard from our partners at Community Vet that they are so busy they have a four-month waiting period for appointments! Veterinarians are doing their best to take care of all the animals, but with the steep increases in pet ownership during the pandemic, it's hard to keep up with demand. It looks like their jobs are going to be quite busy and stressful for the coming months. Please be kind and patient when you make an appointment with your hard-working veterinary staff. And it doesn't hurt to send a note of thanks or appreciation for their service. We're all in this together.

This issue of Healthy Pet Gazette looks at

- · Keeping pets and pet parents happy and healthy
- · Tips for staying safe at the dog park

If you have any ideas for topics you'd like to see covered in future issues of the Healthy Pet Gazette, $\underline{please\ email\ me!}$

Thank you.

Dr. Ama

Anna M. van Heeckeren, MS, DVM

Animal Welfare: A Growing Need for Assistance



Social Media

Promote sharable content and expand your reach with social channels

- Bring fresh, qualified traffic to your website
- Promotion and providing content for others to share
- Growth focus: Lead generation & traffic



One Health Organization

September 10 at 8:00 AM · §

Within several months Kathy lost her husband, daughter, and dog. After she put her life together, she adopted Chloe. When Chloe needed dental care, Cathy received Vouchers to help with bills. #petsandpeople https://hubs.ly/H0W8LZ70



ONEHEALTH.ORG

Kathy and Chloe's Story

After experiencing great loss, Kathy struggled with feeling alone. Then she met Chloe and, thanks to generous...

Advertising

Promote sharable content and expand your reach with social channels

- Google Ad Grants
- Facebook



Analyze & Optimize

Analyze Inbound Activities

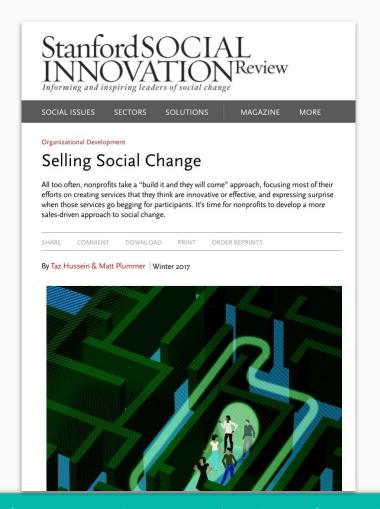
Demonstrate results and continuously improve.

- Monthly analysis
- Team reporting session
- Report on SMART goals & key activities
 - Traffic
 - Leads
 - Conversions
 - Campaigns
- Include follow up & optimization

Marketing Return on Investment (MROI)

- SALES GOALS come from your organization's budget lines for revenue — fee-for-service training, consulting, membership, events, donations, etc.
- MARKETING GOALS come from your marketing plan
- SALES AND MARKETING ALIGNMENT enables you to:
 - Tell how marketing is contributing to sales
 - Set marketing goals
 - Plan marketing activities
 - Justify marketing expense

"All too often, nonprofits take a 'build it and they will come' approach... It's time for nonprofits to develop a more sales-driven approach to social change."



Sales & Marketing Alignment

Understand – and track – **the entire lifecycle** of a 'customer'

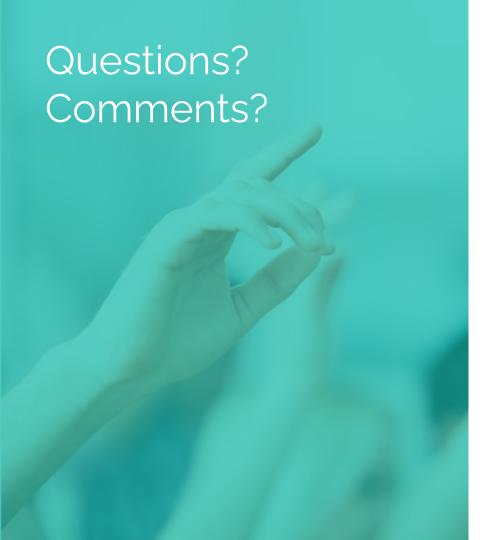
A good beginning approach to sales & marketing alignment is to start with these questions:

- What marketing efforts drove the most revenue?
- What specific touch-points inspire our prospects to take action, or influence action?
- How long is our 'buyer's journey'?
- What's the first touchpoint of our most common donation level, or new membership?





yodelpop.com/consultation



Contact jackie@yodelpop.com