

**Organization name**  
**Outline of Marketing Plan**

**EXECUTIVE SUMMARY**

One-two pages

**SITUATIONAL ANALYSIS**

1. Summary of current situation
  - a. Financial
  - b. Services and products
  - c. Customers
  - d. Themes/messages/materials
2. SWOT summary
3. Key strategic issues guiding marketing plan

**PROPOSED MARKETING STRATEGY**

1. Articulate goals of marketing strategy
2. Elevate \_\_\_\_\_ Image
  - a. Attributes to promote
  - b. Key messages aimed at various audiences
  - c. Positioning statement
3. Preserve key existing markets
  - a. Case statement - value of \_\_\_\_\_ to \_\_\_\_\_
  - b. Key performance outcomes
4. New markets
  - a. Explore .....
  - b. Offer new ....
5. Phasing - recognizing limited staff for new initiatives
  - a. Describe plans for utilizing board....
  - b. Prioritize key contacts for Executive Director

**IMPLEMENTATION AND TACTICS**

1. Visual look - graphic identify

- a. Logo - change or leave as is
  - b. Tag line - new?
  - c. Etc.
2. Get testimonials for use in materials, online
  - a. From clients
  - b. From other funders/supporters
3. Printed materials
  - a. Integrated family of materials:
    1. Brochure
    2. Annual report
    3. Business cards
  - b. Identify venues for displays and/or materials
  - c. Mail/distribute to ....
4. Electronic communications
  - a. Website - revised structure and look, strategy for increasing visibility
  - b. E-newsletter?
5. Media visibility
  - a. Radio?
  - b. Social media?
  - c. Print media?
6. Personal outreach to potential partners
  - a. By whom - mostly board, ED, others
  - b. Targets