An Open Guide to Integrated Marketing Communications (IMC)

AN OPEN GUIDE TO INTEGRATED MARKETING COMMUNICATIONS (IMC)

The how-to guide for building marketing campaigns for non-profits, activists, and advocates

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Vancouver

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"Never limit yourself because of others' limited imagination; never limit others because of your own limited imagination."

— Dr. Mae Jemison

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Guiding Statement

The Open IMC project is a collection of individual and group work used to design and publish an open-licensed IMC guide online in order to assist future Non-Profit Organizations. The Open IMC project is not a sponsored product of any of the websites and resources that we've included in the guide.

Summary

We have prepared an open Integrated Marketing Communications (IMC) guide for small to medium not-for-profit organizations. It contains these 3 components: strategic insights with audience analysis, graphic standards, along with guidelines and mockups, and the overall IMC plan with additional supplementary information. This resource was created by 34 students, who all have Business and/or Graphic Design backgrounds, as part of a Marketing Course with the objective of creating an online, open guide to help guide non-for-profit organizations through their communication campaign efforts.

Purpose

Ultimately, a successful Open Guide to IMC is one that:

- Provides a framework for IMC that is affordable, accessible, equitable, and inclusive
- Creates a resource that anyone can adapt and use
- Reaches NFP's, NGO's, advocates, and activists
- Supports marketing efforts in pursuit of the SDG's

Methodology

Our Open Guide to IMC was created by thirty-five people. We all contributed_ in building and integrating an IMC guide for NPO by using the great open-source of PressBook. At the end of this project, we developed our own ePortfolios in order to expand and showcase our skills in the work we have done for future employers to see.

Tools and Media

Our Open Guide to IMC was assembled and published as an online open resource. The contents of this open resource take on many forms such as, alt text, infographic, questionnaire, but probably not formulation or lengthy description. The authors used different tools and media that are interactive and ideal for spreading widely. We encouraged users of our Open Guide to IMC to craft their NPO idea by digital tools or platforms, such as (but not limited to) H5P, Canva, or Unsplash.

Creative Mandates

Creative elements that were included in the Open Guide to IMC:

- We provided insights and design materials intended to help define a potential target audience and spectrum of allies.
- We crafted examples of creative briefs to help guide non-profit organizations, and their agency counterparts (if applicable) to navigate their IMC campaigns.
- We produced an entire mocked-up organization (NoHungerBC) as a way to provide relevant examples of design solutions.
- We made infographics and other creative elements using a free resource that we recommended in our guide for complete transparency.

Project Theme

Our collective theme is to come together as a collective regardless of race or colour, and create original and open-source content to share with the universe. With our original and open-source content, we deconstructed the barriers preventing our knowledge from being shared, and constructed a textbook with a passion to share with the people who require the knowledge the most. All aspects of our project connect in some way, however loosely, with this theme, or otherwise radically and respectfully diverge from the theme in a way that inspires awe, surprise, or success.

Ethical and Responsible Usage

All components and content in this Guide should aim to help students to develop an effective IMC campaign for education purposes and never be downloaded and published by individuals or for commercial selling.

Peer-review Process

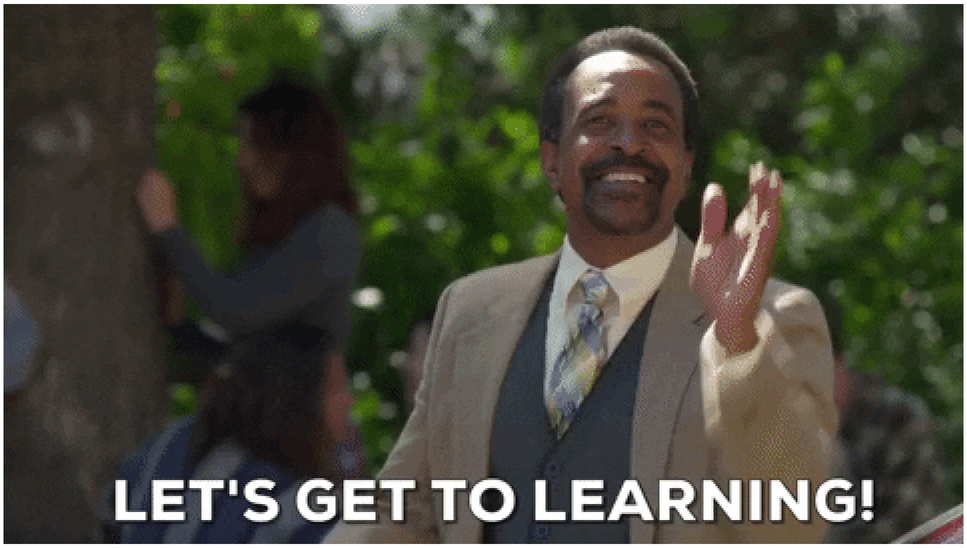
During this project, we held ourselves accountable to our work by meeting consistently with our team groups and conducting regular reviews of the work we created to ensure it aligned with our guiding purpose. The purpose of conducting these reviews was to meet the short term objectives we had set for ourselves, in order to fulfill our long term goal of creating an accessible and inclusive IMC guide for small to medium-sized not for profit organizations yet to not discourage creative risk-taking and exploration beyond the original scope of what we believed the assignment to be. Because we engaged in this collegial peer review process, we believe our work is uniquely suited to meet the needs of emerging non-profit organizations due to our collective experiences and strengths as a group and we feel proud to publish it for a wider audience.

Sharing Our Work

By publishing our work to sources that all non-profit organizations can reach, we are contributing to the success and sustainability of non-profit organizations. In this way, we can see our work grow and adapt while serving our society, which benefits the deserving communities that non-profit organizations help to thrive.

Our Legacy

Our experience in creating this project has been eye-opening and incredibly rewarding. At first, upon embarking on this journey we felt nervous and were concerned about getting it right in creating a valuable resource, yet excited about challenging ourselves in order to benefit others. Along the way, we learned things we didn't know before, such as the small changes that nonprofits can make to traditional marketing to better benefit them, and the importance of unlearning many traditional marketing cliches and examples that we have been taught. As we bring this project to a close we hope future students will benefit from and feel inspired to look to open-source texts and marketing instructors will consider continuing to implement them in the future.



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LIST OF AUTHORS

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PART I.

INTEGRATED PRIMARY & SECONDARY RESEARCH

"Learning is not an accumulation of knowledge, but rather one thing only: understanding."

-Donna Jo Napoli

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Section Breakdown

In this section, you will learn about primary research and secondary research portraying the ways in which organizations utilize this information to increase their understanding of what the public may need.

The topics that this section will go over include:

- Define the meaning of Primary and Secondary research
- Identify the pros and cons of Primary and Secondary research
- Learn the major techniques for Primary Research
- Understand the types of Secondary Research Data
- Learn how an NPO conducts their research process

CHAPTER 1.

PRIMARY AND SECONDARY RESEARCH

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Definition of Primary & Secondary Research

Primary Research

Primary research involves the collection of data that does not yet exist. Primary research focuses on answering questions about current trends, issues, human behaviour, or is used to reinforce secondary research. For example, a telephone survey gathering opinions on the best options for homelessness, or an in-depth interview administered with the goal to gather personal insight on the opioid crisis. It is often undertaken after the researcher has gained some insight into the topic by reviewing and analyzing secondary research.

Secondary Research

Secondary research involves the collection of data and information that exists and has already been published. Secondary research focuses on answering questions with past research studies and existing information. For example, an NPO accesses an online database to find more information about cultural differences or social norms.

Why Do Non-Profits Need to Do Research?

Marketing research is defined as the methodical design, collection, analysis, and reporting of reliable marketing information that is relevant to a particular problem faced by an organization in order to **reduce uncertainty** at a reasonable cost.

According to the American Marketing Association (Nonprofit Marketing, 2006), **marketing research** can be used to:

- Identify and define marketing opportunities and problems.
- Generate, refine, and evaluate marketing actions that have been or will be implemented.
- Monitor marketing strategies.

Marketing research can use either primary data or secondary data. These types of research can further your understanding of your audience, which is a key part of any marketing campaign.

Types of Research

Please review the different types of research below:

1. Direct Observation

One way to learn about people is to observe them. By observing respondents' actions without direct interaction. This can refer to the social media sites that the audience prefers to go on, what advertisements they tend to click as so on. Usually, this information can be found within online analytics.

2. Interviews and Surveys

Because your demographic analysis will be limited to your most likely audience, your most accurate way to learn about them is to seek personal information through interviews and surveys. Interviews may be conducted face-to-face, by phone, or by written means, such as texting. They allow more in-depth discussion than surveys, and they are also more time-consuming to conduct. Surveys are also sometimes conducted face-to-face or by phone, but online surveys are increasingly common. You may collect and tabulate survey results manually, or set up an automated online survey through the free or subscription portals of sites like Survey Monkey and Zoomerang. Using an online survey provides the advantage of keeping responses anonymous, which may increase your audience members' willingness to participate and to answer personal questions. Surveys are an efficient way to collect information quickly; however, in contrast to interviews, they don't allow for follow-up questions to help you understand why your respondent gave a certain answer.

3. Focus Groups

A focus group is a small group of people who give you feedback about their perceptions. As with interviews and surveys, in a focus group, you should use a limited list of carefully prepared questions designed to get at the information you need to understand their beliefs, attitudes, and values specifically related to your topic.

4. Using Existing Data about Your Audience

Occasionally, existing information will be available about your audience. For instance, if you have a student audience, it might not be difficult to find out what their academic majors are. You might also be able to find out their degree of investment in their education; for instance, you could reasonably assume that the seniors in the audience have been successful students who have invested at least three years pursuing higher education.
In today's day and age, there are a lot of online resources built into business accounts, such as Facebook, Pinterest, LinkedIn, Twitter, and Google, that collect this observation research and relay the information back in the form of statistics. These online resources can be usually found under the settings tabs under analytics.

Once a non-profit organization has developed a needs-centred orientation, a logical next step is to engage in research to **better understand how the public views the organization** or on an **ongoing societal issue**. Effective marketing starts with a strong knowledge of your audience, that gives you unique insights into what they want and how to satisfy them better than the competition. The most reliable source of marketing information is current insights.

Understanding the point of view and demands of the public does not necessarily mean that the NPO should satisfy those wishes. Instead, it means that the NPO can develop a better understanding of its own strengths and weaknesses and if appropriate, modify aspects of the organization to better suit its audience. For example, an organization shifts the time of day on a free service that is being offered or decides to implement an additional time slot during the week so that it **can better meet the public's needs**.

Quantitative Data vs. Qualitative Data

Primary Data is new information the organization gathers directly from respondents they interact with, surveys, or alternative research methods. Although primary data can be expensive to collect, it's often extremely useful because it's "just what the doctor ordered" to guide the organization's thinking.

Primary data can be either quantitative or qualitative. **Quantitative research** is usually based on a large-scale sample of respondents and is typically expressed in numeric terms such as averages, percentages, or statistics. **Qualitative research** is more open-ended in eliciting the stories, anecdotes, and descriptive words people have for products or lifestyle attributes.

Quantitative vs Qualitative Data

Quantitative	Qualitative
Provides an overall picture of a general population or geographical region. It can also often be used to measure trends over time. This type of evidence is valuable for describing who, what, where, and when.	Provides richer, deeper, and broader information based on a few individuals or case examples. This type of evidence is valuable for describing how and why.

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CHAPTER 2.

PROS AND CONS OF RESEARCH

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Advantages and Disadvantages of Primary Research

If enough information cannot be found through internal or external secondary data to solve the NPO's problem, the organization will then proceed to design a study wherein they will collect **Primary Data;** information collected for a particular research question or project.

Primary research often is richer and more directly useful, but it also has its downsides. The term primary research is widely used in **Academic Research**, **Market Research,** and **Competitive Intelligence.** Primary research aids organizations with obtaining information directly from sources themselves, instead of relying on the research of others.

Displayed in the table below is a detailed pro and cons list on Primary Research. It lists several advantages and disadvantages and provides brief information on each component.

Advantages and Disadvantages of Primary Research

Advantages	Disadvantages
• **Specific.** The NPO gets to define the goals of the research and focus the research on its own objectives. • **Proprietary.** The NPO can keep the results private. • **Controlled.** Not only does primary research enable the NPO to focus on specific subjects, but it also enables the researcher to have higher control over how the information is collected. • **Information.** Primary research can be used to yield more data and survey a larger sample. Providing users with more detailed information. • **Quantitative Data.** Primary researched tends to provide numbered data that is measurable using metrics. This data can be organized into information and used to provide insights and knowledge from a subject.	• **Costly.** Primary data may be very expensive in preparing and carrying out the research. The cost can be incurred in producing the paper for questionnaires, paying staff members, or renting equipment for an experiment. • **Time-consuming**. Primary data collection requires the development and execution of a research plan. It takes longer to undertake primary research than to acquire secondary data. • **Low Engagement.** Primary research can be hard to gain volunteers to participate in primary data collection if there are no rewards. This information may be hard to use if there are a low number of responses. • **Inaccurate Data.** Information obtained from Primary Research may not always be accurate. This information may also describe what people think and believe but not necessarily how they behave in real life.

Advantages and Disadvantages of Secondary Research

Like primary research, secondary research offers pros and cons. Similar to the table provided above, lays a table below displaying detailed pros and cons list on Secondary Research. It lists several advantages and disadvantages and provides brief information on each component.

Advantages and Disadvantages of Secondary Research

Advantages	Disadvantages
• **Inexpensive**. The costs are shared or already paid. • **Rapidly accessible.** The data has already been collected and analyzed. • **Large sample size.** The pooled resources of the government agency or trade organization allow it to survey thousands or millions of people. • **Reliable.** The external research organization may have years of experience in gathering and analyzing a particular type of data • **Historical Documents.** This data has already been researched and vetted by others and is used to build a basis for the subject of a not-for-profit organization.	• **Dated.** The secondary research may have been done months or years before. • **Widely disseminated.** A competitor may have access to the same information when they devise their strategies. • **Generic or off-target.** The goals of the external research organization may be different from those of the company. • **Difficult to Obtain.** Relevant data may become hard to find or be outdated. Some research may even be costly to purchase or be currently non-existent. • **Different Purpose.** Data in Research may be utilized for different grounds, making the information irrelevant to the organization's topic.

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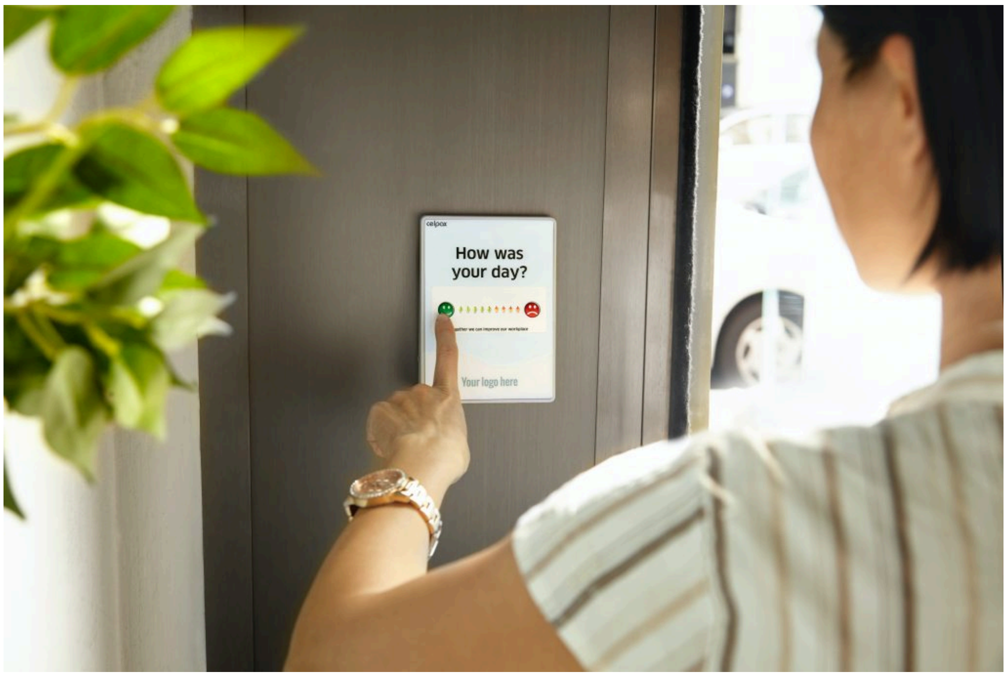
CHAPTER 3.

MAJOR TECHNIQUES FOR PRIMARY RESEARCH



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In the case of primary data, the most commonly used tools and techniques are:

Surveys (Questionnaires and Interviews)

Surveys are the most common of all techniques for data collection as far as the field of marketing is concerned. They are conducted over a sample to learn about individuals' awareness, liking, and preferences for an offering or a brand. They may also be undertaken to measure customer satisfaction.

Example: Surveying people about their opinions on social norms, roles, behaviour, or current events.

Focus Groups

Focus group research is conducted with a group of people that are monitored by a moderator. The moderator focuses on the group of people, usually between 6-10, who are carefully selected based on demographic, psychographic, and/or behavioural considerations.

Example: How do people feel about their upbringings, culture, societal opportunities, or political beliefs in the current climate?

Observational Research

The observational research technique is based on observing people and drawing conclusions. The technique helps gain insight and an in-depth understanding of how people behave in their environment by carefully watching them interact with others or with an object.

Example: Are there significant power dynamics between race, ethnicity, education, age, gender, sexuality, culture, or class?

Behavioural Research

Behavioural research is based on a individuals' genuine response and actions, which are recorded and analyzed. The assumption is that there is a difference between a customer's action when other's are watching versus how they would genuinely act on their own accord.

Example: Are people more likely to respond and donate to a fundraiser that's hosted online or in-person when they are approached by a representative?

Experimental Research

Experimental researchstudies the cause-and-effect relationships between independent (cause) and dependent (effect) variables. This technique is the most time consuming, but the most scientifically valid and reliable approach towards conducting research studies and solving problems. In controlled settings, where the sample is treated as a test group, the variables under study are altered/manipulated and the reactions of the sample are recorded; thereafter these findings are generalized.

Example: Study human reaction based on societal changes, movements, political statements, or injustice through videos. One group would continuously watch videos that highlight the necessity of using force to control a situation whereas, the other group would view videos that demonize physical altercations.

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CHAPTER 4.

PRIMARY RESEARCH PROCESS FOR AN NPO

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The **primary research** process should be orderly and proceed in a logical manner. At any step of the process, the researcher may find that the answer to the original research problem has become clear and that the process should not continue past that point.

The primary research process can be categorized as a five-stage procedure. The stages outline are neither mutually exclusive nor sequential, however, for clarity, the following is the outlined research procedure.

Step 1: Define the Problem and the Research Objectives

First, the marketer has to define the research problem. The problem definition entails questions like "What is the problem?", "What are the various issues?", "What information is needed?" etc.

Second, the research problem should be conceptualized and the objectives should be defined; the reasons as to why the research is being undertaken should be defined. The objectives should be defined neither too narrowly nor too broadly.

The objectives can be any one or more of the following: explanation, prediction, insight generation and discovery, hypothesis testing, monitoring of the environment, among others.

Step 2: Develop Hypotheses and Formulate a Research Plan

Once the problem has been conceptualized, the researcher has to develop the research plan. The research plan contains details on the data sources, research tools and techniques, sampling plan, and contact methods for data collection.

Step 3: Collect Data, both Primary and Secondary

After the objectives of the study and the research plan are laid out, the market researcher goes on to collect data. The data is collected from primary and secondary sources. To start with, the researcher accesses secondary data and then moves on to collect primary data. They may use any of the tools and techniques depending upon the research plan. This is a time-consuming stage of research. With the advancement of technology, data collecting methods are improving day by day.

Step 4: Analyze and Interpret Data

After the data is collected, it is analyzed and interpreted. The major question is "What conclusions can be drawn?" Both statistical and non-statistical tools are used for analysis.

For descriptive data analyses, the following tools are used:

- Parametric analysis: Central tendency (mean, median, mode), Dispersion (Standard deviation, variance, Range, Shape of curve: Skewness, Kurtosis)
- Graphical method: Bar chart, Histogram, Line graphs, Pie chart
- Tabular method: Frequency distribution tables

Step 5: Prepare a Report and Present the Findings

Lastly, the report is prepared and the findings are presented to the marketing department. The report should comprise of a summary/abstract, research problem, objectives, methodology, findings, conclusions, recommendations and limitations. The report should be short; it should be precise and related to the research problem only

Companies could either conduct consumer research through services of their in house marketing information systems or outsource the activity to marketing research consultants.

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CHAPTER 5.

TYPES OF SECONDARY RESEARCH DATA

Photo by William Iven on Unsplash

Secondary sources allow you to broaden your research by providing background information, analyses, and unique perspectives on various elements for a specific campaign. Bibliographies of these sources can lead to the discovery of further resources to enhance research for organizations.

There are two common types of secondary data: Internal data and External data. Internal data is the information that has been stored or organized by the organization itself. External data is the data organized or collected by someone else.

Internal Secondary Sources

Internal secondary sources include databases containing reports from individuals or prior research. This is often an overlooked resource—it's amazing how much useful information collects dust on an organization's shelves! Other individuals may have conducted research of their own or bought secondary research that could be useful to the task at hand. This prior research would still be considered secondary even if it were performed internally because it was conducted for a different purpose.

External Secondary Sources

A wide range of information can be obtained from secondary research. Reliable databases for secondary sources include Government Sources, Business Source Complete, ABI, IBISWorld, Statista, and CBCA Complete. This data is generated by others but can be considered useful when conducting research into a new scope of the study. It also means less work for a non-for-profit organization as they would not have to create their own data and instead can piggyback off the data of others.

Examples of Secondary Sources

Government Sources

A lot of secondary data is available from the government, often for free, because it has already been paid for by tax dollars. Government sources of data include the Census Bureau, the Bureau of Labor Statistics, and the National Centre for Health Statistics.

For example, through the Census Bureau, the Bureau of Labor Statistics regularly surveys individuals to gain information about them (Bls.gov, n.d). These surveys are conducted quarterly, through an interview survey and a diary survey, and they provide data on expenditures, income, and household information (families or single). Detailed tables of the Expenditures Reports include the age of the reference person, how long they have lived in their place of residence and which geographic region they live in.

Syndicated Sources

A syndicated survey is a large-scale instrument that collects information about a wide variety of people's attitudes and capital expenditures. The Simmons Market Research Bureau conducts a National Consumer Survey by randomly selecting families throughout the country that agree to report in great detail what they eat, read, watch, drive, and so on. They also provide data about their media preferences.

Other Types of Sources

Gallup, which has a rich tradition as the world's leading public opinion pollster, also provides in-depth reports based on its proprietary probability-based techniques (called the Gallup Panel), in which respondents are recruited through a random digit dial method so that results are more reliably generalizable. The Gallup organization operates one of the largest telephone research data-collection systems in the world, conducting more than twenty million interviews over the last five years and averaging ten thousand completed interviews per day across two hundred individual survey research questionnaires (GallupPanel, n.d).

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CHAPTER 6.

PROCESS OF CONDUCTING SECONDARY RESEARCH

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Step 1: Define your research topic and question

1. Start with a thorough literature review
2. Ensure that the research question has clinical or policy relevance and is based on sound a priori reasoning. A good question is what makes a study good, not a large sample size
3. Be flexible to adapt your question to the strengths and limitations of the potential datasets

Step 2: Select a dataset

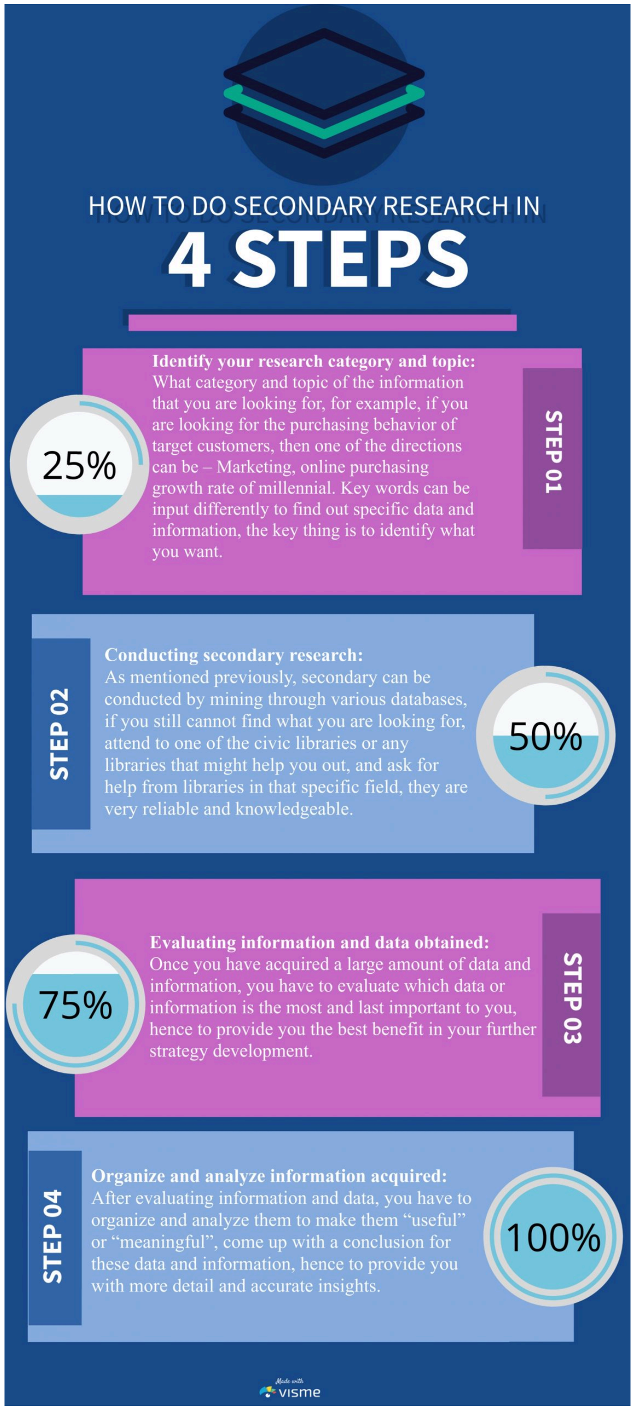
1. Use a resource such as the Society of General Internal Medicine's Online Compendium
2. To increase the novelty of your work, consider selecting a dataset that has not been widely used in your field or link datasets together to gain a fresh perspective
3. Factor in the complexity of the dataset
4. Factor in dataset cost and time to acquire the actual dataset
5. Consider selecting a dataset your mentor has used previously

Step 3: Get to know your dataset

1. Learn the answers to the following questions:
    - Why does the database exist?
    - Who reports the data?
    - What are the incentives for accurate reporting?
    - How are the data audited, if at all?
    - Can you link your dataset to other large datasets?
2. Read everything you can about the database
3. Check to see if your measures have been validated against other sources
4. Get a close feel for the data by analyzing it yourself or closely reviewing outputs if someone else is doing the programming

Step 4: Structure your analysis and presentation of findings in a way that is clinically meaningful

1. Think carefully about the clinical implications of your findings
2. Be cautious when interpreting statistical significance (i.e., p-values). Large sample sizes can yield associations that are highly statistically significant but not clinically meaningful
3. Consult with a statistician for complex datasets and analyses
4. Think carefully about how you portray the data. A nice figure sometimes tells the story better than rows of data



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PART II.

STRATEGIC INSIGHTS

Section Breakdown

This section defines how non-profit organizations can **apply primary and secondary research** to develop key strategic insights regarding audience behaviour and preferences.

The topics that this section will go over include:

- The definition of “Strategic Insights” and why it is important to an NPO
- How to transform research and resource into key insights
- How to effectively manage insights

CHAPTER 7.

DEFINING STRATEGIC INSIGHTS

Photo by Lilartsy from Pexels

The goal of conducting research for a non-profit organization is to arrive at actionable insights that may be used to better allocate its resources. The research data alone will not answer the questions *"What"* or *"Why"* something is happening (Reichelt, 2018), thus it is up to the manager or the marketing team to interpret the collected data.

How to Gain Strategic Insights

Preparation: Primary & Secondary Research

Identify the problem your organization needs to solve and collect data from primary and secondary research. For example, if your problem is low brand awareness then data to collect could include results from consumer surveys, focus group interviews and industry statistics.

Analysis: Finding Meaningful Connections

Look for the relationship between all the data you are gathering. Find connections and questions that relate to your objective. For example, what pieces of the data are most important to your organization? Organize this in order of priority and interpret it. Identify the areas that align with your objectives for further improvement. Apply technology and human resources in this step.

Brainstorm: Encouraging Teamwork

Think about the questions you've developed as a group and share your conclusions with each other. Discussing with a team will help your organization identify important insights. Such as what resources are available to solve your problem statement. Here it will help to have a variety of department members to discuss what your organization is capable of.

Communicate: Working as a Unit

Explain the situation to your organization and provide further detail in order to spread the information and gain more insight. Communication is key throughout any organization aiming to achieve their business goals. The more you communicate the need for insight gathering the easier it will be to fully understand potential solutions for the problem you are aiming to solve.

Re-evaluation: Managing Strategic Insights

Once you've identified key strategic insights the next step is to build your strategy, your action plan, to solve your problem statement and once completed, testing and evaluating will be a vital part to continuous insight gathering. Consider adding a CRM system for efficient data management throughout your marketing plan.

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Stokes, R. (2013). EMarketing: The essential guide to marketing in a digital world. Cape Town: Quirk eMarketing. Retrieved from: https://www.redandyellow.co.za/content/uploads/2018/06/RedYellow_eMarketing_Textbook_6thEdition.pdf

CHAPTER 8.

TRANSFORMING RESEARCH INTO INSIGHTS

Photo by [My Life Journal](#) from [Unsplash](#)

The data obtained from conducting primary and secondary research is only valuable when turned into something that can be interpreted. In order to develop a successful IMC plan, an NPO must convert the information into compelling and unique insights that will help determine the appropriate strategy to pursue.

Translating Marketing Information into Action

The interpretation of the data collected from the research may vary from person to person or from team to team. To keep in-sync, it may be useful to review the original problem the research is trying to solve. The person, or the team, developing the insights should be reminded that the goal of using marketing information is to gain strategic insights that will help make the organization more effective.

The managers, or the marketing team, should think about how the research results can help better understand the intended audience and translate this understanding into adjustments to the marketing mix better to address the audience or the organization's needs. By framing research results around a more in-depth or broader knowledge of the focus of the research – like customer behaviour, audience preferences, etc., it can help the organization feel more informed and empowered to make the right marketing decisions.

IMC Planning: Analyzing the Results

The following is a list of the types of questions the organization can explore, as they brainstorm about how marketing information and research results can help adjust the marketing strategy and improve the marketing mix. These questions are a useful jumping-off point for deeper conversations about new insights and how to put them into action.

- What new insights do we have about our target audience?
- Which problems should be solving for our audience?
- What type of campaigns will work best for each target audience?

Communication:

- How can we make it easier for our audience to access our information?
- What are the most efficient methods communication deliver?
- How do we identify if the information is properly interpreted by the audience?

Budgeting:

- How much return are we getting from our pad media? (ROI)
- Are our resources adequately contributing to our marketing objectives?
- Can our resources be allocated effectively to improve our campaigns?

IMC Research Insight Development

Here are six questions to explore to develop IMC Insights:

1. Are we targeting the right segments?
2. Which problems should we be solving for our audience?
3. What attracts viewers to our platforms?
4. What type of campaign will work best for each target audience?
5. How can we make it easier for our audience to find our information?
6. What are the most efficient methods of communication delivery?

Attribution

This page contains material taken from:

NSCC & Lumen Learning. (n.d.). Reading: Using Marketing Information. Retrieved from https://pressbooks.nscc.ca/nsccprinciplesofmarketing/chapter/reading-using-marketing-information/

CHAPTER 9.

MANAGING INSIGHTS

Photo by [William Iven](#) from [Unsplash](#)

Managing and Storing Data

Upon conducting the research and compiling the findings, it is essential to keep track and format the information so that it may be easily accessible. A **CRM system**, or similar robust record-keeping programs, are useful tools that can be used to manage varied amounts of data which can then be configured to produce the insights the organization intends to develop.

Example: Survey Data Management

A Vancouver non-profit organization wants to find out how their organization can become more representative of BIPOC. The NPO decides to conduct a series of online questionnaires determining how their clients perceive their current services using a rating system of 1-5. At the beginning of the survey, qualifying questions were asked including their name, preferred gender, age, marital status, education, and association with black, indigenous, and minority communities.

The data from the survey is then inputted into a CRM system where the answers are compiled into categories that provide an overview of the information surveyed. The CRM system cross tabulates the data based on gender, age, and culture with the results that show whether the company is fully inclusive or have areas where they can improve.

The CRM system is especially effective at helping to surface a marketing problem, and it can provide the internal data needed for an analysis, which in turn is used to solve the problem. An effective CRM system should be designed and used to capture data across all of the organization's touchpoints. The information in the system should also be updated regularly in order to produce accurate results.

In addition to bringing together disparate customer data, CRM systems can recommend an analytical approach and provide research tools to complete the analysis. Many CRM systems have mechanisms for reporting results, orchestrating plans for taking action on the results, and even evaluating the effectiveness of those actions.

Resources: Free CRM Tools

Below is a list of free CRM tools to help manage data and consolidate it into useful information for management:

Hubspot.com – HubSpot is an industry known company that provides digital marketing services for all organization sizes and allows you to monitor and analyze data effectively. Products include CRM plans for sales teams, marketers, small businesses, and more.

Zoho.com – Zoho provides a full CRM platform and has been awarded for their services. It is free to sign up and allows up to 10 users for their initial start-up plan.

Monday.com – Monday.com includes a self-serve knowledge base with 24-hour customer support. It allows for a free account for as long as needed with up to four users at a time.

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This page contains material taken from:

Palacios, Ricardo Colomo, Berbís, Juan Miguel Gómez, & Crespo, Ángel García. (2007). An integrated methodology for customer relationship management customization. *JISTEM – Journal of Information Systems and Technology Management, 4*(3), 287-300. https://www.scielo.br/scielo.php?script=sci_arttext&pid=S1807-17752007000300002

PART III.

THE ENGAGEMENT LADDER THEORY

Section Breakdown

In this section, you will learn what an Engagement Ladder is and how this tool can be used by NPOs to turn passive audience members into involved supporters.

The topics that this section will go over include:

- Definition of an Engagement Ladder
- How to create an engagement snapshot
- How to implement the Engagement Ladder Theory to grow support
- Case study example of how this theory has been used

CHAPTER 10.

THE ENGAGEMENT LADDER THEORY

Photo by Luis Vidal on Unsplash

Defining the Engagement Ladder

The **Ladder of Engagement** is a tool that can be used to build relationships with your audience over time in order to deepen their commitment to your organization. Barefoot, Tsazo, and Lamb (2014) stated that "the Engagement Ladder Theory is based on the concept that all organizations have audiences connected to them with different levels of awareness, passion, and commitment." This theory suggests that people are likely to become supporters of your organization by taking easy actions, but can be consciously led up the ladder to take harder and harder actions.

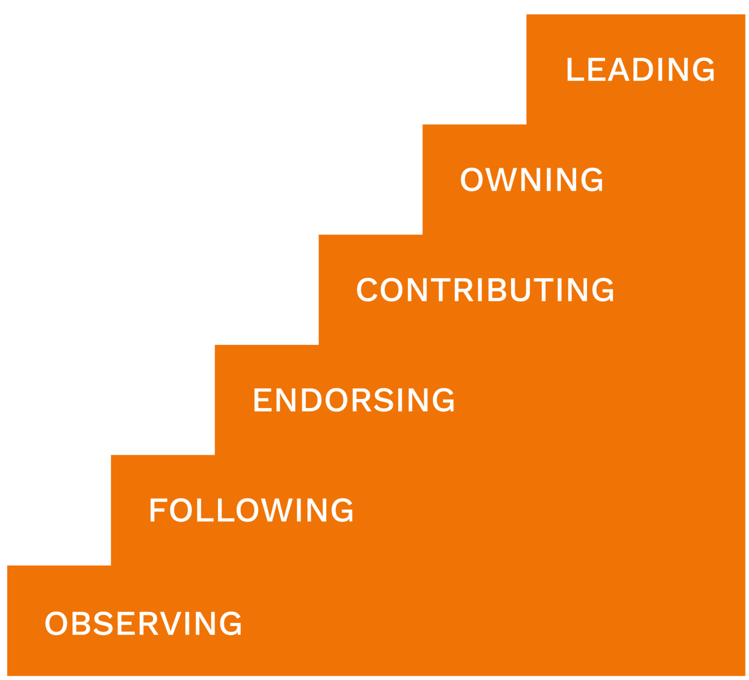
How do you move your audience from one step, to another?

How do your move your audience from signing a petition to donating money to leading the build of a playground?

These shifts are fundamental to more meaningful involvement that leads to consensus building and the types of solutions that can transform communities.

Using the Engagement Ladder to Gain Support

The Engagement Ladder Theory suggests that the audiences of any organization can have different levels of connection to them. Because of this, audiences have different levels of engagement and require interactions and communications that are tailored to their needs. The engagement ladder concept provides an understanding of how charities gain support, financially and otherwise. There are six steps to building effective, long-term, community support.



1. Leading

Nonprofits need strong leadership to grow resources and mission impact. It's possible to recruit board members using traditional tactics, but helping leadership evolve up the engagement ladder brings authentic, committed, effective people to the top posts in a nonprofit.

2. Owning

Although some donors just make a small contribution and then move on, there's still room to move further up the ladder. When a donor views an organization as their go-to charity in a certain category, then they are more likely to become a volunteer and bring their own friends and ideas to the table. Nonprofits can use self-reporting tools and surveys to find "owners" and move them further up the ladder.

3. Contributing

Many nonprofits consider getting a new donor as the end of a process. This step can also be seen as a qualifier for those who may be ready to bring in new people to start at the base of the engagement. Word of mouth request for engagement is more likely to start a conversation than bulk solicitations from a charity.

4. Endorsing

A supporter that shares a status update or forwards an email is more valuable than one that would read it and move on. This means that communication from your organization should be valuable enough to the supporter to make them want to share it.

5. Following

There is too much clutter to assume that observing a nonprofit once will hold a supporter's attention. A viewer should find enough value in a charity to feel the need to stay connected. Email newsletters, social channels, and web-based seminars are some ways to engage observers and keep them moving up the engagement ladder.

6. Observing

Getting introduced to potential new supporters is difficult. However, getting found can be achieved through careful search engine strategy, select paid promotions, using the right social networks for the right audience and more. You have to cut through the clutter if you want your non-profit organization to be discovered.

Attribution

This page contains material taken from:

Barefoot, D., Szabo, J., & Lamb, T. (2014). The Noble Arsonist [EPub]. Retrieved from https://www.capulet.com/noble-arsonist

Engel, E. C. W. (2018, September 5). Membership 101: Ladder of Engagement. Retrieved June 1, 2020, from https://www.getmespark.com/membership-101-ladder-of-engagement/

Thorman, D. (n.d.). Digital Citizenship. Retrieved May 30, 2020, from https://www.knightfoundation.org/digitalcitizenship/

Next in Nonprofits. (2015, December 31). Engagement Ladder. Retrieved May 30, 2020, from https://www.nextinnonprofits.com/2015/12/engagement-ladder-2016/

CHAPTER 11.

APPLYING THE ENGAGEMENT LADDER THEORY

Photo by Simon Migaj on Unsplash

CASE STUDY | Grist.org

Grist.org is a Seattle-based nonprofit news website for environmental news, reports, and opinion. Grist.org has succeeded in connecting with a younger audience that not only reads its content but is also inspired to take action. Their mission is to communicate what is going on in the movement around climate and sustainability to a broader audience of people who may not consider themselves environmentalists, help them understand how those issues relate to their everyday lives, and move those people to action.

Grist.org is a data-informed organization that uses a ladder of engagement not only to guide its content and social media integration strategy but uses measurement at each rung of the ladder to ensure that they are getting results. They engage users around content that shows how being green can reshape our world and inspire personal behaviour change, ultimately impacting society at large.

Grist.org's ladder of engagement is simple and shows how their audience makes the journey from passive consumers of information to sustainable living champions. The steps include reading, commenting, and sharing stories of personal behaviour change. Grist.org uses page views as an indicator of success at the bottom rung of the ladder.

Grist.org's Key Results

- **Footprint:** The reach of their activities, both online and offline.
- **Engagement:** Readers engage with their content.
- **Individual Behaviour Change:** Impact on user's behaviours, purchase decisions, and daily lives that are in line with sustainability.
- **Societal Change:** Impact on society, policy discussions, and conversations that advance sustainable practices.

Grist.org uses its social media channels as a fun on-ramp to their ladder of engagement. They have learned from their survey research, real-time monitoring, and content analysis of comments on their posts that a lot of people care deeply about environmental issues, but don't self-identify as "environmentalists."

Grist.org has been experimenting with Twitter Chats and fun hashtags to attract people to their content, but also empower them to advocate for on-the-ground change. For example, they launched a series of Twitter Chats called "Bikenomics: Make Cities More Bike Friendly" using the hashtag #bikenomics. The idea is that biking to work is not only good for the environment but can also help local economies. Among other changes, it requires encouraging employers to have more bike-friendly policies. Not only did the Twitter chats help grist.org connect with new readers who were passionate about this idea, but the series helped inspire action from readers who reported on surveys that they encouraged employers to establish bike-friendly policies like "bike to work days" or install bike racks.

They have regular surveys on the site as well as an in-depth annual reader survey that includes questions such as "How has our work impacted your daily life?" The questions are about behaviour change to sustainable practices – have they switched from buying bottled water or are they buying more locally sourced produce. grist.org also asks about whether a story has inspired them to pursue an issue by contacting a company or local official. The data informs their editorial decisions and choices for social media tactics so they are on track for moving people up the rungs of the ladder – from passive readers to green consumers and ultimately to a more sustainable planet.

Continued Learning

Learn more about Grist.org measures along the Ladder of Engagement

Watch: Measuring Along the Ladder of Engagement Grist

Attribution

This page contains material taken from:

Kanter, B. (2011, September 15). grist.org: Measuring Along the Ladder of Engagement. Retrieved May 30, 2020, from http://www.bethkanter.org/tweet-huggers/

Video by Hidayat from the Noun Project

CHAPTER 12.

IMPLEMENTING THE ENGAGEMENT LADDER SNAPSHOT

Photo by Jessica Alves on Unsplash

Before you begin planning how to lead your supporters to the top of the ladder, it is a good idea to discover where they currently are. This is known as a **Ladder of Engagement Snapshot**. It is essentially a report that breaks down how many supporters you have on each "rung" of your ladder.

The Ladder of Engagement Snapshot is useful because you can use it to inform the actions you proceed with in the future, and can refer to it frequently to see if you've successfully moved your supporters up the ladder.

Defining Your Ladder

The first step in creating a Ladder of Engagement Snapshot is defining your ladder. Make a list of the types of call-to-actions your organization has desired, then place them in order from the easiest action your audience can take, to the most difficult.

You may decide that several easier actions can earn someone a higher place on the ladder. You also may want to label the different levels on the ladder. For example, your ladder could start with easy actions, then build up to more difficult ones and look something similar to this:

- **Inactives:** Subscribed to your email list but haven't taken action in the last three months.

- **Supporters:** Have signed 1-2 petitions in the last three months.
- **Activists:** Have signed 3-4 petitions in the last three months, but have not taken any other actions.
- **Super Activists:** Have signed more than 4 petitions in the last three months, and/or have written a letter to the editor.

Find Out How Many Supporters are on Each Rung

The next step is to query your database to find out how many supporters fall onto each level of the ladder. Exactly how you go about doing this depends on your action-taking tool. You may find it helpful to go back and refine your ladder based on the information that's available in your particular tool. This is also a good opportunity to identify how many supporters you would like to have in each. Not only does this allow a reasonable goal, but it allows you to see how well you have done so far.

Once you've got your Ladder of Engagement Snapshot, be sure to share your findings throughout your organization so others can benefit from knowing and recognizing the different levels of your organization's supporters. Also, run the report regularly to measure change over time. Twice a year is recommended to compare results.

"Ladder of Engagement" by the Netroots Foundation is licensed under a CC BY-NC-SA 3.0 licence.

- Easy actions: Sharing a status update or forwarding an email.
- Harder actions: Making a donation.
- Even harder actions: Becoming a volunteer.
- Very hard actions: Helping with leadership or becoming a board member.

Continued Learning

- Follow Salsa Labs practical steps on moving supporters up the ladder of engagement: Practical Steps to Move Supporters Up the Ladder of Engagement
- Take inspiration from Big Duck for adding compelling steps to your NPO's ladder of engagement: The five steps on your ladder of engagement
- Read about how New Media Guide turned casual supporters into fierce advocates using the engagement ladder theory: Using the Ladder of Engagement

Attribution

This page contains material taken from:

Foley, M. (2013, September 17). Netroots Foundation | Where are your supporters on the Ladder of Engagement? | Winning the Internet. Retrieved June 1, 2020, from https://www.netrootsfoundation.org/2013/09/where-are-your-supporters-on-the-ladder-of-engagement/

PART IV.

SPECTRUM OF ALLIES

Section Breakdown

In this section, you will learn about the Spectrum of Allies and how this tool can be applied to categorize and improve the understanding of key players in a given situation. It will also demonstrate the potential actions an NPO can take in order to garner support against the opposition.

The topics that this section will go over include:

- Defining and categorizing key players in a given situation
- Utilizing the Spectrum of Allies to make decisions
- Case study examples of how the Spectrum of Allies can be applied and implemented

CHAPTER 13.

THE SPECTRUM OF ALLIES

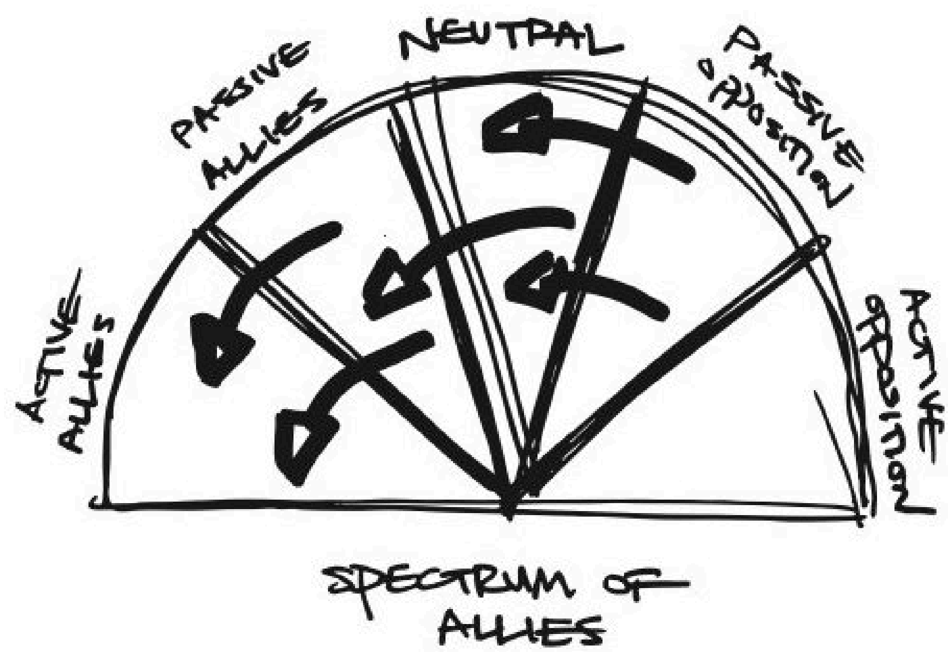


Photo by Joshua Kahn Russel from Beautiful Trouble.

Defining the Spectrum of Allies

The Spectrum of Allies is a tool that enables organizations to categorize their support groups, their opposition, and the general public. According to Joshua Kahn Russel, an organizer, and strategist for the Ruckus activist society, "movements seldom win by overpowering the opposition; they win by shifting the support out from under them." Therefore, this tool allows an organization to categorize all social blocs at play on a given issue and to convert the given parties towards their point of view.

Categorizing the Spectrum of Allies

The Spectrum of Allies is categorized into five different slices:

1. **Active Allies:** the active allies work in alignment with your organization
2. **Passive Allies:** the passive allies agree with your position but do not act
3. **Neutrals:** the neutrals don't have a clear position and therefore avoid action
4. **Passive Opposition:** the passive opposition disagrees with your position but does not act
5. **Active Opposition:** the active opposition actively works to hinder your organization's

progress

Many activist groups tend to focus on one slice of the spectrum of allies; the Active Allies segment since they already have support from these groups. However, as stated previously, a movement is not won by overpowering the opposition, but rather by getting people to agree with your organization's points or position.

When implementing the Spectrum of Allies, it is important to first categorize all supporting groups, neutral groups, and opposing parties. Doing this allows your organization to break down the amount of support and opposition, as well as look for ways to shift support towards your organization.

Attribution

This page contains material taken from:

Russell, J. (n.d). Beautiful Trouble. Retrieved June 10, 2020, from https://beautifultrouble.org/principle/shift-the-spectrum-of-allies/

CHAPTER 14.

APPLYING THE SPECTRUM OF ALLIES

Photo by Shane Rounce from Unsplash

In order to apply the Spectrum of Allies, you must first familiarize yourself with the current situation. Put yourselves in the #BlackLivesMatter organizers' shoes during May 2020. In this given situation, the goal of the activists is not to receive monetary compensation but rather to uphold a movement against the unjust systemic racism and race-based prejudice in general.

Types of #BlackLivesMatter Allies

There were different types of allies that participated in this movement:

Active Allies

A group of active allies is those who are actively at peaceful rallies demonstrating their support.

Passive Allies

Those who donate money or just agree with active supporters (this group may be afraid to take action due to conflict-avoidance or they just might not be sure what actions to take).

Neutrals

Those who are neither for or against this movement (this group may not be fully aware of the situation, they could be more worried about their finances given the COVID-19 Pandemic or they may not know the reach and implications of the given situation).

Passive Opposition

Could be against the rallies or the movement in general (this group may disapprove of the actions taken by the movement or could be influenced by their peers).

Active Opposition

Those who show up at rallies to actively go against protesters.

Developing the Message

With the movement #BlackLivesMatter, there are many Passive Allies that agree that society needs to change but struggle to take action for a variety of reasons. Once the activists decide which segment they want to target, they can decide a path to take based on the opinions and motivations of the given segment.

Passive allies

Since this group already agrees with your point of view, your goal is to get them to take action. Asking them to show up to the rallies to help out is a great call to action if they are unsure of what action to take. If they are afraid of conflict, asking them to help by calling to protest or sharing their point of view through social media or with family and friends is another action they could take.

Neutrals

Getting them to visit a website or social media to see your viewpoint and encourage them to have an active voice, is a great way to get them thinking about the situation. Another way would be to get them to sign your petitions or sign up for your newsletters, allowing them to take a step towards being a passive ally.

Continued learning

Learn more about the #BlackLivesMatter movement.

CHAPTER 15.

IMPLEMENTING THE SPECTRUM OF ALLIES

Photo by Jason Hargrove from Flickr

CASE STUDY | Wet'suwet'en

What is happening in Wet'suwet'en Nation?

TransCanada Energy (TC Energy) is pushing to place a gas pipeline through the Wet'suwet'en territory in northern British Columbia. To build a pipeline through this Indigenous-owned land, under local, federal, and international law, the clans of that area must give consent to the company to build.

TC Energy, the RCMP, and the federal and provincial governments are openly violating this law. The Unist'ot'en (people of Wet'suwet'en land), other Indigenous groups, and local environmentalists are rightfully angry and lobbying officials to reconsider this decision.

- **Active allies:** The many groups that have banded together with the Indigenous people who opposed the building on their ancestral lands and active protestors in cities across Canada. These are the people who created blockades, preventing the pipelines from being built.
- **Passive allies:** The people who sign petitions online against building the pipeline, talking with friends, and sharing posts.
- **Neutrals:** The general public, they may not understand the laws being broken, or the impact that pipelines have on the environment.
- **Passive opposition:** The RCMP who are arresting people participating in blockades and protests, as well as Chiefs in the Wet'suwet'en nation who believe the pipeline will benefit the community.
- **Active opposition:** The government and TC Energy who refuses to listen to The Unist'ot'en.

The chances of succeeding in swaying the active opposition are usually too low to be worth the time, effort, or money it would take. Active Allies should usually focus on the Neutrals or the Passive Allies in order to apply pressure. From there they can group in larger numbers to possibly gain more control of the passive opposition.

Continued Learning

1. Read "How to build a base using one on ones" and learn how to categorize your current spectrum of allies as well as increase your knowledge of your allies and what drives them.
2. Read "How Campaigns are really created" to get a generalized view of how to create a campaign. Utilizing the spectrum of allies throughout the campaign process allows for greater connection and understanding resulting in a greater likelihood for success.

Attribution

This page contains material taken from:

Gitman, L., McDaniel, C., Shah, A., Reece, M., Koffel, L., Talsma, B., & Hyatt, J. (2018). Introduction to Business. Pressbooks, Rice University. Retrieved June 8, 2020, from https://opentextbc.ca/businessopenstax/chapter/market-segmentation/#fs-idm501098176

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Wet'suwet'en and the Assertion of Their Traditional Laws [Press release]. Retrieved from http://www.wetsuweten.com/files/Media_Release_-_January_16,_2019.pdf

Wet'suwet'en Supporter Toolkit 2020. (n.d.). Retrieved July 13, 2020, from https://unistoten.camp/supportertoolkit2020/

PART V.

AUDIENCE ANALYSIS & SEGMENTATION

Section Breakdown

The following section covers Audience Analysis and Segmentation and how these can help your campaigns target specific groups of individuals efficiently and effectively. After reading this section you will be able to complete the following objectives.

The topics that this section will go over include:

- Know the difference between Audience Analysis and Audience Segmentation
- Define the meaning of “Audience Analysis” and why it is important
- Learn how to analyze an audience through research and list the examples
- Define each segmentation type listed within this section
- Know different forms of marketing research

CHAPTER 16.

AUDIENCE ANALYSIS

Photo by PAIGE LEIDIG From NETBASE

In order to do an audience analysis, you have to determine your call to action. A call to action refers to what actions you would like your audience to partake in. This can include converting, donating, volunteering, and sponsorships. Once you know what issues you are attempting to solve and what ways people can help, you need to figure out who is the best fit to put these actions to use.

Audience analysis is the process of gathering information about the people in your audience so that you can understand their wants, needs, desires, expectations, beliefs, values, attitudes, and opinions. When you understand your audience, you are better able to cater to their interests and needs.

Why conduct an audience analysis?

Audience analysis is one of the key components of customer discovery. The business model of an NPO will evolve as they explore their customer's needs. Identifying your initial target market will help you more clearly define the scope of your project and plan for the first several years of operations. Identifying your initial target market will also help you figure out how to allocate your scarce resources even as an NPO that lacks resources, capabilities, and capital.

Audience analysis can be conducted for a low cost as there are a number of different demographic resources available online. There are also a number of market research reports to help entrepreneurs refine segmentation, consumer preferences, as well as compile demographic profiles that can help them discover motivations and buying patterns.

Audience research is undertaken at the initial stages of a communication campaign to understand the intended audience's needs, knowledge, attitudes, and behaviours, and barriers to a recommended basket of options. At the audience analysis stage, information is also obtained on audience preferences for communication channels and the frequency of usage on these communication channels.

Audience analysis enables the communication planner to determine the types of incentives and barriers that the audience perceive to exist, their most preferred channels or formats, the most credible sources, segment an audience into groups with similar information needs and preferences, select the objectives most appropriate for an audience, select the best media channels to reach an audience, develop concepts or messages to achieve the communications objectives and plan for communication impact assessment.

Diversity is a key dimension of audience membership and audience analysis. While the term "diversity" is often used to refer to racial and ethnic minorities, it is important to realize that audiences can be diverse in a number of different ways. Being mindful of diversity means being respectful of all people and striving to avoid racism, ethnocentrism, sexism, ageism, elitism, and other assumptions.

Attribution

This page contains material taken from：

Audience analysis. (n.d.). Retrieved July 28, 2020, from https://saylordotorg.github.io/text_stand-up-speak-out-the-practice-and-ethics-of-public-speaking/s08-audience-analysis.html

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CHAPTER 17.

AUDIENCE SEGMENTATION

Photo by JONAS JACOBSSON from UNSPLASH

Audience segmentation is the process of sorting people into homogeneous subgroups based on demographic, geographic, behavioural, and psychographic categories. The following four categories help NPO's analyze and segment their target audiences and choose the right communication channel to create connections and interactions with them. Audience segmentation acts as a general way that businesses give people what they want and make the right offer based on the information and insight collected through analysis. Therefore, NPO's are able to deliver more tailored messaging and make marketing and promotion more relatable and relevant.

Benefits of Audience Segmentation

1. Improved Focus

The more you know about your customers, the more you can focus on meeting their needs. By analyzing the segmentation information, the business can fine-tune the product to cater to customers' needs. They can use these data to create targeted advertising and marketing campaigns for the subsets of customers. It also increases the chances of target visitors and leads become customers.

2. Ability to Expand

Audience segmentation identifies a new market and expands intelligently by using geographic segmentation tools. Brands can determine their efficiency in catering to specific regions and turn increasing their potential for growth.

3. Enhances Customer Reach

As the brands use audience segmentation well, they can better plan marketing campaigns or product pricing. Provide tailored plans for specific targets and stay connected to them, and can increase customer retention effectively.

4. Increase Profit

Due to the business's focus on particularly targeted customers, they can increase brand awareness and customer loyalty. Also, the business can make data-based decisions that affect productivity and profitability.

Photo by [OMAR LOPEZ] on [UNSPLASH]

Different Audience Elements

As most organizations don't have the resources or the budget to reach every market out there, instead, through the study of buyer behaviour and audience analysis they are able to break up the market into different sub-markets. From there, you can gear a campaign to target the smaller group a lot based on their shared interests, attitudes, values, and opinions.

These audience elements can be used within audience analysis as topics to better understand your audience. You can also use these elements in segmentation as different ways to break up this audience.

Some basic audience elements that you can define your target audience are demographic, geographic, psychographic, behavioural, occasional, benefit, and volume.

- **Demographic:** Age, gender, ethnicity, education, social class, household income, household size, marital status, employment status, family status, language, religion, and political affiliation
- **Geographic:** Regional location, population density (urban, suburban, rural), city or county size, climate
- **Psychographic:** Lifestyle, personality, interests, values, attitudes
- **Behavioural:** Knowledge, attitude towards, use of, or response to
- **Occasional:** The circumstance of usage and purchase of a product or service
- **Benefit:** Benefits provided by the good or service
- **Volume:** Amount of use (light versus heavy)

Demographic

Demographic elements use categories such as age, gender, ethnicity, education, social class, household income, household size, marital status, employment status, family status, language, religion, and political affiliation to differentiate among markets. Demographic elements are valuable because they provide the person with important information and insight while being easy and cheap to collect. The U.S. Census Bureau provides a great deal of demographic data, especially about metropolitan areas which can be useful for NPO's that are lacking resources and capabilities.

> **Example: Using Demographics**
>
> Marketing researchers can use census demographic data to find areas within cities that contain high concentrations of a specific audience that are relevant and reachable to your NPO. Demographic data is easier to obtain over other forms of data collecting, however, demographic research is limited to only fact-based information on your audience. This is why it's recommended to use more than one form of research for a better understanding of your audience.

Geographic

Geographic elements mean segmenting markets by region of the country, city or county size, market density, or climate. Market density is the number of people or businesses within a certain area. Many companies segment their markets geographically to meet regional preferences and buying habits.

> **Example: Geographic Segmenting**
>
> This form of research is great for finding volunteers or creating events. Specifying a location in your NPO or Campaign name, using geographical hashtags, and/or adding a location to your online pages and posts will help attract an audience from that location.

Psychographic

Demographics provide basic data on individuals, but **psychographics** provides vital information that is often much more useful in crafting the marketing message. Psychographic elements are defined by personality or lifestyle. People with common activities, interests, and opinions are grouped together and given a "lifestyle name."

> **Example: Determining the Psychographics**
>
> Imagine if two different people were to be described by demographics as male, managers, 35 years old, with $80,000 per year income. An NPO who just saw the demographics could create a call for support that reached both persons. However, if the NPO knew that one of the two was captain of a rugby league team and the other was a holder of opera season tickets, the messaging could be designed very differently, drawing more interest from these specified individuals and creating a more intimate relationship with them.

A good way of going about finding specific psychographic characteristics is by looking at adjectives to describe your audience. Below is a list of possible adjectives to choose from, this exercise could even help you develop your own organization's identity.

Audience Adjectives Exercise

Choose 4-7 words you feel best describe your target audience. Keep these on file to reference during the rest of the branding process.

adaptable adventurous agreeable aggressive ambitious analytical approachable authoritative bold casual cautious charismatic clear clever collaborative colourful competitive confident conservative contemporary cooperative courageous creative critical curious determined demanding direct edgy eccentric encouraging energetic enthusiastic fierce flexible formal fresh fun gentle helpful honest imaginative independent inspiring intelligent innovative knowledgeable mature modern organized playful pleasant practical professional proud quirky radical rebellious reliable savvy serious sleek sophisticated straightforward strategic striking strong social stubborn supportive sustainable trendy trustworthy u nconventional urban visionary

Behavioural

Behavioural segments groups according to their knowledge of, attitude toward, use of, or response to a product. This provides a deeper look into how a consumer acts towards a certain topic, which could be a product, advertisement, or campaign.

Example: Behavioural Segmentation

Segmentation and the associated mindset (while acknowledging the multi-dimensional differences between people) allows service providers, implementers, policymakers, and government officials to target initiatives and lead to a greater likelihood of lasting behavioural change. Most NPOs with a Sustainable Development Goal, need behavioural efforts to occur for change to happen with their social cause.

Additional Points to Consider

Occasion

Companies can analyze and segment the market according to the occasions of use, such as whether the product or service will be used alone or in a group, or whether it is being purchased as a present or for personal use. This insight can help marketers know how to work their advertisements and campaigns, by knowing how the product or service is bought and used. There are three main types; universal occasions, regular personal occasions, rare personal occasions.

Example: Marketing for the Occasion

Movember is a trending occasion where people are encouraged to grow out their facial hair for the month of November to raise awareness for men's health. With a specific focus on mental health and suicide prevention, prostate cancer, and testicular cancer, Movember has funded more than 1,250 men's health projects around the world, challenging the status quo, shaking up men's health research, and transforming the way health services reach and support men. Since its launch in 2003, they've had over 5 million participants, all through the month of November.

Benefit

Benefit analysis and segmentation are based on what a product or service will do rather than on consumer characteristics.

Example: The Benefit Factor

4Ocean is an established business that collects plastic from the ocean and turns them into bracelets. 4Ocean is not a nonprofit organization as they don't accept donations, but the money they make from selling bracelets directly funds their continued efforts to clean the oceans.

"We believe business can be a force for good and hope our model encourages others to pursue creative solutions to this global crisis."

– 4Ocean | About

Volume

Volume analysis and segmentation are based on the amount of interaction your nonprofit would receive. Just about every product, service, or organization has heavy, moderate, and light users, as well as nonusers. Heavy users often account for a very large portion of the overall interaction. Thus, an organization might want to target its marketing mix to the heavy-user segment. This can be measured in donations, awareness, and/or engagement.

Example: Volume Analysis

An NPO might notice a large portion of their annual volunteers are graduating high school students looking to fill their resumes and portfolios with charitable work. The NPO would do well to find a marketing mix that focused on this segment and those surrounding teens and young adults, such as schools and parents.

Pair each word with the proper defining characteristics listed below.Words to select from: Volume, Occasion, Demographic, Geographic, Benefit, Psychographic, Behavioural

1. Age, education, gender, income, race, social class, household size.
2. Regional location, population density (urban, suburban, rural), city or county size, climate.
3. Lifestyle, personality, interests, values, attitudes.
4. Knowledge, attitude towards, use of, or response to.
5. Circumstance of usage and purchase of a product or service.
6. Benefits provided by the good or service.
7. Amount of use (light versus heavy).

Answers:

1. Demographic
2. Geographic
3. Psychographic
4. Behavioural
5. Occasion
6. Benefit
7. Volume

Continued Learning

To obtain a better understanding of your target audience, below we have provided a questionnaire for you to answer: Target Audience Questionnaire.

Answer the questions in the four sections: demographic, geographic, psychographic, and behavioural, about your desired target audience. This will provide you with insight on how to procure a better understanding of your audience, at no cost!

Attribution

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CHAPTER 18.

STEPS FOR AUDIENCE SEGMENTATION

Photo by Coffee Geek on Unsplash

Audience segmentation is a process of identifying groups of people within a larger population with similar beliefs, behaviours, political ideology that are most relevant to the objectives of the campaign. Audience segmentation research – if conducted insightfully – provides organizations with an important strategic planning asset: information about how best to focus the organization's limited resources, both human and financial, to advance its objectives. For example, a smaller audience segment whose members are willing to behave in ways sought by the organization may be a more productive target than a larger, less predisposed audience segment.

Audience segmentation is a key aspect of achieving the objectives of the campaign or the organization as a whole. Knowing whom to target and how to target them helps create the reach you need to create a proactive response when applying it to a SDG.

How to Conduct the Audience Survey

1. Identify the problem or issues to be addressed by the survey

Take a moment to determine what your organization is attempting to achieve. Think of the SDG, Sustainable Development Goal, you are attempting to highlight and help.

2. Formulate survey objectives

The survey objective might be to determine the media habits and perceptions, knowledge, and practices in environmental protection of farm families. Drawing up a list of variables that will help find answers to the survey objectives could put the researcher on the right track in designing the questions to ask in the survey. Specific questions that are aimed at various aspects of the problem could help clarify the research problem.

3. Develop the survey instrument

In a survey, a popular instrument used for data collection is a questionnaire that contains a series of questions designed to gather information from the respondents. The survey questionnaire may contain questions on the demographics of respondents, their communication access and exposure, knowledge, attitude and practice questions on an identified problem, among others.

4. Pretest the questionnaire

When the survey questionnaire has been compiled, it needs to be translated into the local language and pretested before being reproduced and used in the field. Pretesting involves interviewing a small group of respondents who are similar to the intended target group to determine their reactions to the prototype questionnaire. The pretest is a screening of the questionnaire to see how it works and whether changes are necessary before the start of the actual survey.

5. Choose sample respondents

An important concern in survey research is deciding how many and which respondents should be included. An audience analysis survey uses standard social science methods in selecting the sample, e.g., multi-stage sampling, stratified sampling, systematic sampling, cluster sampling, and simple random sampling. The choice of sampling technique depends primarily on the nature of the problem, the cost and time factors involved, and the desired precision or reliability of the results. It is recommended that the sample be drawn from a cross-section of the sampling population so that this group can be said to represent the larger population.

6. Implement the field survey

When the questionnaire has been pretested, finalized and reproduced, the next step is to implement the field survey. Before they are fielded, interviewers are oriented on the purpose of the survey and trained on interviewing skills and how to conduct the interviews. Guided by the sampling plan and respondent list, the interviewers locate the respondents, conduct the interviews, and check the completed questionnaires after the interview.

7. Code and analyze survey data

Once the completed questionnaires have been edited, the data need to be analyzed. Depending on the main objective of the survey, this analysis phase can be relatively simple – such as manually determining the % of respondents giving specific answers or listing the various ways in which farmers said they might utilize a new practice. For more complex surveys, particularly where the aim is to predict for the entire population from the results of the sample population, it is best that the data are encoded, processed and analyzed using a statistical package. Ease of use, power, and cost are some of the important considerations in the choice of computer software for data analysis.

8. Write the survey report

The analyzed data are interpreted and the results of this interpretative process are reported. The purpose of a survey report is to tell the readers the research problem, data collection methods used, findings, and conclusions. Like other research reports, the survey report should consist of an executive summary, introduction, description of the methods, results and discussion, and conclusions.

7 Basic Steps to Segmenting Audience

To create your audience segmentation, consult the seven basic steps below.

The following steps are recommended for developing an audience segmentation (Compass, n.d.):

1. Collect the information on the primary audiences from situation analysis and audience analysis.
2. Identify the audience characteristics to determine whether segmentation is necessary.
3. Decide what criteria to use to segment your audience by demographics, geography, behavioural, and psychographic.
4. Segment the audience to highlights potential audience segments.
5. Target the audience from many segments are identified.
6. Evaluate whether each segment meets the criteria for effective segmentation.
7. Develop comprehensive Audience Profiles and write the creative brief.

Attribution

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Compass. (n.d.). How to do audience segmentation. Retrieved June 1, 2020 from https://www.thecompassforsbc.org/how-to-guides/how-do-audience-segmentation

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CHAPTER 19.

APPLYING AUDIENCE SEGMENTING TO SDGS

Photo By JULIA JOPPIEN from UNSPLASH

An integral part of strategic planning for a public engagement campaign involves selecting the target audiences that are the best fit for the organization's public engagement goals and resources. Depending on their goals and resources, some organizations might be well served to focus their entire effort on a single target audience. Other organizations might be best served by targeting several audiences. Regardless, campaigns that target specific audiences and tailor their materials accordingly are more likely to achieve their public engagement objectives than campaigns that do not.

For any given organization, the optimal target audiences are those that are likely to maximize the return on investment in campaign planning and execution. The three most relevant considerations in making that determination are the size of the audience segment, the likelihood that members of the segment will respond in an intended manner, and the organization's ability to reach that segment with its current resources.

Here is an example of developing an Audience Segmentation based around a SDG (Sustainable Development Goal). In this case, the example is SDG #13: Climate Action.

Example: Developing an Audience Segmentation for SDG #13: Climate Action

The principal aim of this research was to identify audience segments within the American adult population that could be considered as potential targets for global warming public engagement campaigns. The nature of the global warming public engagement challenge – e.g., the need to build public understanding and support for appropriate public policies, and to change the behaviour of large numbers of people – necessitated that we adapt and extend previously used segmentation methods.

Specifically, there is a strong precedent in the research literature for segmenting audiences based on what people are doing (behaviours) and why (motivations). That method is well suited to population behaviour change campaigns (e.g., smoking cessation campaigns), but it largely ignores a second potential focus for global warming public engagement campaigns: building public understanding of and support for appropriate public policies.

They conducted a nationally representative survey of adults and used three major categories of variables as inputs into a segmentation analysis: global warming motivations, behaviours, and policy preferences. The global warming motivations category included two distinct sub-categories: beliefs about global warming and the degree of involvement in the issue. They measured a total of 36 variables across these four categories. Find more details on the survey method below:

Survey Method

In September through October of 2008, they conducted a nationally representative survey of American adults using KnowledgePanel, an online panel operated by Knowledge Networks. Recruited nationally using random-digit dialing (RDD) telephone methodology, KnowledgePanel is representative of the U.S. population. The panel tracks closely the December 2007 Current Population Survey (published jointly by the U.S. Census Bureau and the Bureau of Labor Statistics) on age, race, Hispanic ethnicity, geographic region, employment status, and other demographic variables.

The length of our questionnaire – a 50-minute completion time for the average respondent – exceeded what most respondents are willing to answer in a single session. As a result, we divided the content of the instrument into two separate questionnaires. An invitation to participate in the first survey was emailed to 3,997 randomly selected panel members. A total of 2,496 completed the questionnaires, a 62% cooperation rate. Two weeks after administration of the first survey was ended, respondents to the first survey received an invitation to participate in the second survey. Completed questionnaires were received from 2,164 respondents, an 87% cooperation rate, leading to an overall 54% within panel completion rate for the study. The period of administration for each survey – from invitation to termination of data collection – was approximately 10 days, during which one reminder email was sent to non-respondents.

To reduce the effects of any non-response and non-coverage bias in the overall panel membership, a post-stratification adjustment was applied using demographic distributions from the most recent data from the Current Population Survey (CPS). Benchmark distributions for Internet Access among the U.S. population of adults are obtained from KnowledgePanel recruitment data since this measurement is not collected as part of the CPS.

The post-stratification variables were:

- Gender: (Male/Female);
- Age: (18-29, 30-44, 45-59, and 60+);
- Race/Hispanic Ethnicity: (White/Non-Hispanic, Black/Non-Hispanic,
- Other/Non-Hispanic, 2+ Races/Non-Hispanic, Hispanic);
- Education: (Less than High School, High School, Some College, Bachelor and beyond);
- Census Region: (Northeast, Midwest, South, West);
- Metropolitan Area: (Yes/No);
- Internet Access: (Yes/No).

To view and analyze each aspect of the variables researched to great the segmentation. Click here to see the full journal, including the tables: Identifying Like-Minded Audiences for Global Warming Public Engagement Campaigns: An Audience Segmentation Analysis and Tool Development

Additional profiling information about the audience segments – i.e., how the six segments differ with regard to a range of additional relevant beliefs, behaviours (including media use), values, and demographics – is available at link 2 in the continued learning section.

The six identified segments – each of which was given a concise name to summarize its essential qualities – differ dramatically with regard to what they believe about global warming, how engaged they are with the issue, what they are doing about it, and what they would like to see American government officials, businesses, and citizens do about it. The six segments also differ with regard to size: the largest represents 33% of the U.S. adult population, and the smallest only 7% (Figure 1). These six audience segments represent a spectrum of concern and action about global warming, ranging from the Alarmed (18% of the population), to the Concerned (33%), Cautious (19%), Disengaged (12%), Doubtful (11%) and Dismissive (7%).

The proportion of the U.S. Adult Population in the Six Segments

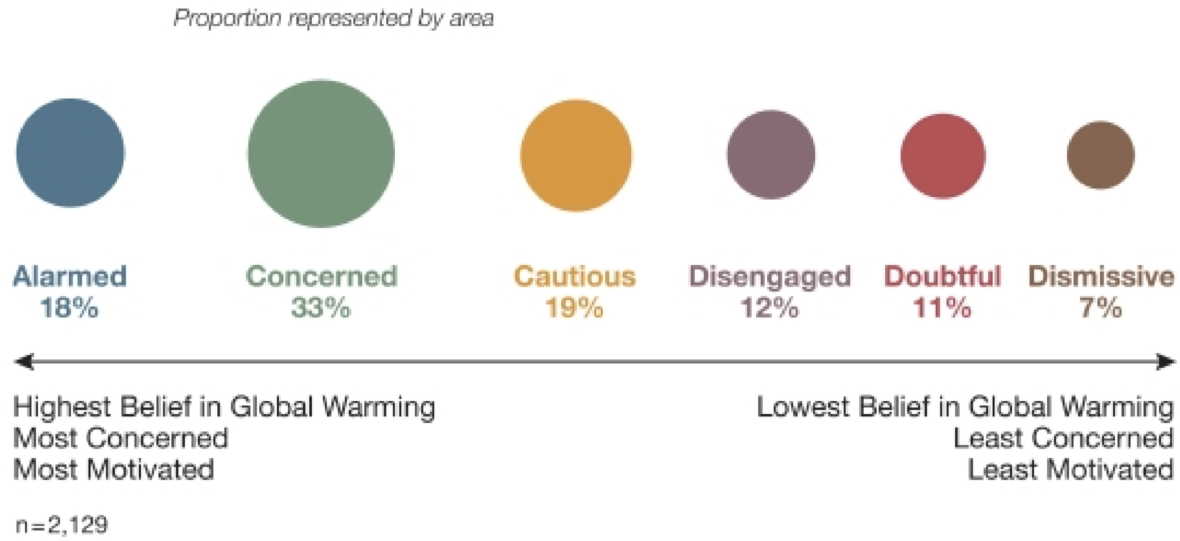

Image of various sized circles showcasing belief in global warming and respective attitudes

Alarmed 18%

In brief, the Alarmed are the segment most engaged in the issue of global warming. They are very convinced it is happening, human-caused, and a serious and urgent threat. The Alarmed are already making changes in their own lives and support an aggressive national response.

Members of the Alarmed segment are a highly engaged and active audience, at least in their capacity as consumers (with the exception of their travel behaviour, which is more or less similar to that of other segments). They have a strong demonstrated tendency to use their consumer purchasing power to reward businesses they believe are contributing to solutions and punish businesses they believe are not. They are markedly less active in their role as citizens, however; only about one in four had contacted an elected official in the past year to urge them to take action to reduce global warming. Organizations seeking to promote policy advocacy – and possibly those seeking to modify people's travel behaviour — should consider targeting this audience.

Concerned 33%

The Concerned are also convinced that global warming is a serious problem, but while they support a vigorous national response, they are distinctly less involved in the issue and less likely than the Alarmed to be taking personal action.

Members of the Concerned segment are moderately engaged in the issue, but they are less active than are the Alarmed. As a result of their high prevalence in the population (1 out of every 3 adults), and their high stated intention to use their consumer purchasing power more frequently in the future to reward businesses they believe are contributing to solutions, organizations seeking to promote change through markets – rather than, or in addition to, change through public policy – should consider targeting this audience.

Cautious 19%

The Cautious also believe that global warming is a problem, although they are less certain that it is happening than the Alarmed or the Concerned. They don't view it as a personal threat and don't feel a sense of urgency to deal with it through personal or societal actions.

Members of the Cautious segment are only modestly engaged in the issue, and they don't appear ready to take action either as consumers or citizens. Organizations that are interested in expanding the number of Americans who are actively considering the issue of climate change (rather than attempting to change people's behaviour, or develop support for policy responses) should consider targeting members of this audience. Narrative-based communication, and reframing the issue in terms of human health may be productive approaches.

Disengaged 12%

The Disengaged haven't thought much about the issue. They are the segment most likely to say that they could easily change their minds about global warming, and they are the most likely to select the "don't know" option in response to every survey question about global warming where "don't know" was presented as an option.

Members of the Disengaged segment currently have no involvement in the issue. The Disengaged stand apart from other segments in that they are less educated and have lower household incomes, both of which place them at a higher than average risk of being harmed by global warming. This is a difficult segment to reach using news media and other traditional science communication channels, both due to their current lack of interest and their financial challenges. Organizations seeking to engage members of the Disengaged must think creatively about how to make the issue more relevant for them. As with the Cautious segment, narrative-based communication, and reframing the issue in terms of human health may be productive approaches. Activating new voices to explain the relevance of climate change – such as health professionals, members of the faith community, and organizations serving low-income families – may be helpful as well.

Doubtful 11%

The Doubtful are evenly split among those who think global warming is happening, those who think it isn't, and those who don't know. Many within this group believe that if global warming is happening, it is caused by natural changes in the environment, that it won't harm people for many decades into the future, if at all, and that America is already doing enough to respond to the threat.

Members of the Doubtful segment are important because – although they currently doubt that global warming is real or harmful, and are disinclined to support actions to address it – they remain open to learning more about this issue. Because the Doubtful tend to be politically conservative, organizations that have the ability to work effectively across the political spectrum should consider developing activities to further engage the Doubtful.

Dismissive 7%

Finally, the Dismissive, like the Alarmed, are actively engaged in the issue, but on the opposite end of the spectrum. The large majority of the people in this segment believe that global warming is not happening, is not a threat to either people or non-human nature, and is not a problem that warrants a personal or societal response.

As a result of their strongly held belief that global warming is not happening or is not human-caused, members of the Dismissive segment are highly involved in the issue as adamant opponents to taking any form of action against global warming. As members of the Alarmed segment, however, they are supportive of taking both personal and societal actions to reduce energy use. Thus, while they are likely not a productive audience for global warming public engagement campaigns per se, they may be an attractive audience for energy-efficiency campaigns because they are receptive to such appeals.

Continued Learning

Please refer to the links below if you would like to continue your learning on these topics.

- The full list of all 17 SDGs, and information about them.
- Additional profiling information about the audience segments.

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Maibach, E., Leiserowitz, A., Roser-Renouf, C., & Mertz, C. (2011, March 10). Identifying Like-Minded Audiences for Global Warming Public Engagement Campaigns: An Audience Segmentation Analysis and Tool Development. Retrieved July 23, 2020, from https://journals.plos.org/plosone/article?id=10.1371%2Fjournal.pone.0017571

PART VI.

PERSONAS

Section Breakdown

In this section, we will learn about personas and their importance to businesses; but more specifically to nonprofit organizations. We will learn how an organization can improve its content and overall marketing campaign once they identify personas.

The topics that this section will go over include:

- Definition of a persona
- Identify how to research and create a persona
- Importance of creating personas
- Discover helpful tools

CHAPTER 20.

DEFINING PERSONAS

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Definition

A persona is a fictional person who represents your target consumer, including their needs, thoughts, and goals. It helps prevent organizations from generalizing all users into one bucket and assuming everyone has the same needs and goals.

For non-profit organizations, your target audience is made up of donors, activists, non-profits, cause organizations, foundations, NGOs, social enterprises, businesses, marketers, web publishers, and video producers.

Why is it important?

Developing a persona allows marketers to make more personalized content that helps their audience relate better with the marketing campaign (League, 2019). This includes making more effective call-to-actions, social media content, landing pages, and email messages (Haydon, 2013).

Usability.gov, a leading resource for guidelines and best practices in user experience online, says the purpose of personas is to "create reliable and realistic representations of your key audience segments for reference" (Usability, n.d).

To be successful in marketing, it is crucial to have a better understanding of your customers and see your business through their eyes. "Being able to think and behave like your customers is the key to being able to communicate with them effectively (Parsons, 2020)." Understanding your customers helps solve problems and gaps the business may be seeing. Personas give you valuable insights that can help you improve your strategies and content (Linde, 2019). Ultimately, having personas will help you make decisions about the way you run your business! From the way you design your website to choosing what platforms to market your business on.

Attribution

This page was created with material taken from:

Fischer, J. (n.d.). Buyer persona: Identifying your hypothetical player. Retrieved from Breaking The Wheel: https://www.breakingthewheel.com/buyer-persona-identifying-hypothetical-players/

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CHAPTER 21.

HOW-TO GUIDE FOR PERSONAS

Developing a Persona for a Non-Profit Organization

1. Conduct Research to Collect Persona Data

If your budget for persona development and research is zero, you can get many of the formal research benefits with a little bit of informal online investigating. All data sources have pros and cons, depending on how the data is collected. Good research reduces bias by combining data from multiple sources.

For more information on the types of research, review Major Techniques for Primary Research. The Pros and Cons of Research can help you make the best decision.

2. Segment your Target Audience

Segmenting target audiences helps non-profits to build up customized strategies for different target audiences and better reach target audiences. You can segment your audience by demographic, psychographic, or user type.

3. Conduct Psychographic Profiling

Analyzing the stakeholder's attitudes, activities, interests, and options will help you understand how they think, their media consumption habits, and how/where they spend time online. This is key information as it communicates us how to best reach them and when.

The persona template for persona development from key stakeholders group includes:

- Name
- Age
- Preferred method of communication/ media consumption habits
- Life Goals
- Values: Understand what they are seeking for, their lifestyle in order to reach them effectively
- How will this benefit them?
- How will they be involved or impacted?
- What do they think/feel about the campaign/issue?
- Where did they obtain the information about the campaign/issue?

Additional Information Needed

Persona characteristics should be anonymous, yet specific. Additional information needed for personas development when it comes to non-profits includes:

- Prioritize roles, motivations, and needs over occupation titles or group affiliations, and strip back demographic detail to a minimum. Think creatively about how to present the characteristics.
- Think creatively about titles that describe roles (not just occupation). A title should convey what you want to compare across the open data industry.
- Include capabilities
- Include incentives
- Include personal anecdotes
- Include a picture
- Once you have a title and some characteristics for each persona, think about their network and their position in the open data economy
- Look at models of existing templates
- Five or six is a good number of personas. Two is probably too little, ten is more than plenty.

Additional Tools

Available templates for persona development include:

- Xtensio has created a User Persona Generator that can be used online free of charge. This is a great tool to use for creating personas including numerous templates.
- Christof Zürn published a persona template under a creative commons license.
- Adele Revella's buyer persona template is more focused on the marketing side, but can also be useful for user experience purposes.
- Marketing company XPLANE has created the Empathy Map, a tool that can help to create a user-focused profile. XPLANE's worksheet focuses on getting at what's most important for your customers—defining their goals and aspirations as well as their preoccupations. It also asks about their environment and influences as well as their behaviour toward others.

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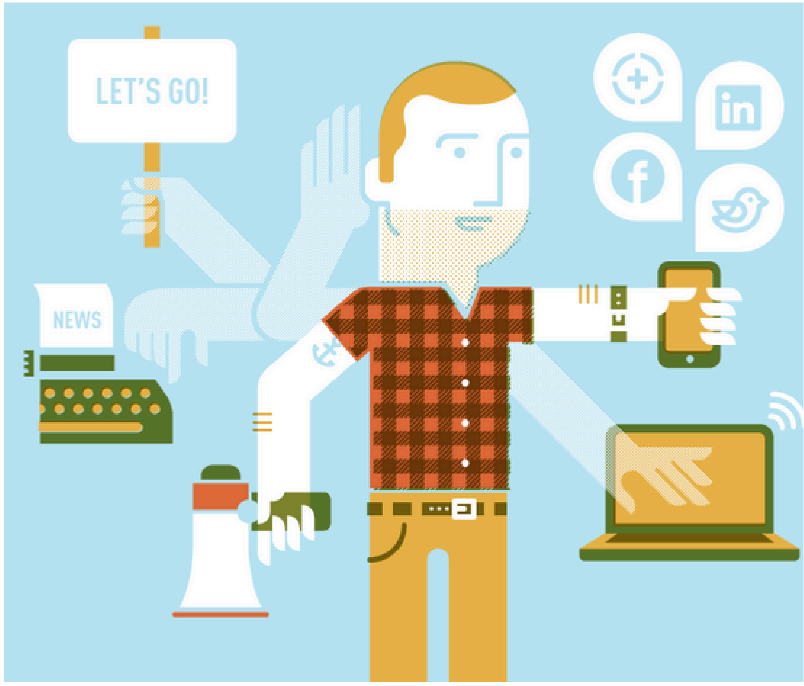
CHAPTER 22.

PERSONA EXAMPLES

Examples of online personas to target, found on Socialbrite.com, are key influencers, engagers, multichannel consumers, and standard consumers. Key influencers are those that are actively listening and want to help spread the message of nonprofit organizations. Engagers are those that will share their opinion and views on the marketer's cause. Multichannel consumers can be reached online and offline to help marketers cause. Lastly, the standard consumer will help the marketer's cause if they have a personal connection or feel strongly about it. The marketer's goal should be to reach the key influencers.

Key Influencers (The Loud Minority)

- **They're all ears.** Provide them compelling, bite-size content that's easy to distribute. Give 'em early access to info and announcements.
- **Natural recruiters.** They can help get the word out about fundraising, advocacy and volunteering.
- **Citizen journalists.** They help determine public discussions on social networks.
- **Massive reach.** Their posts are widely read and shared by more people than posts generated by any other group.



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Engagers (An Army of Messengers)

- **Broadcasters.** They generate posts to their healthy social networks.
- **BFFs.** They are strong influencers of people they know personally.
- **Scout's honour:** They've earned the trust of their massive social groups.
- **Opinionated!** Get them to share their thoughts on your cause.
- **Informers.** They share information with their social networks.

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Multichannel Consumers (Social Connoisseurs)

- **Offline too!** Reach them at offline touch points and invite them to participate in online social media.
- **Friendlies.** They influence to some extend via normal friend-to-friend engagement.
- **Takin' it easy.** Due to their level of activity, their sphere of influence is not a dominant part of their persona.

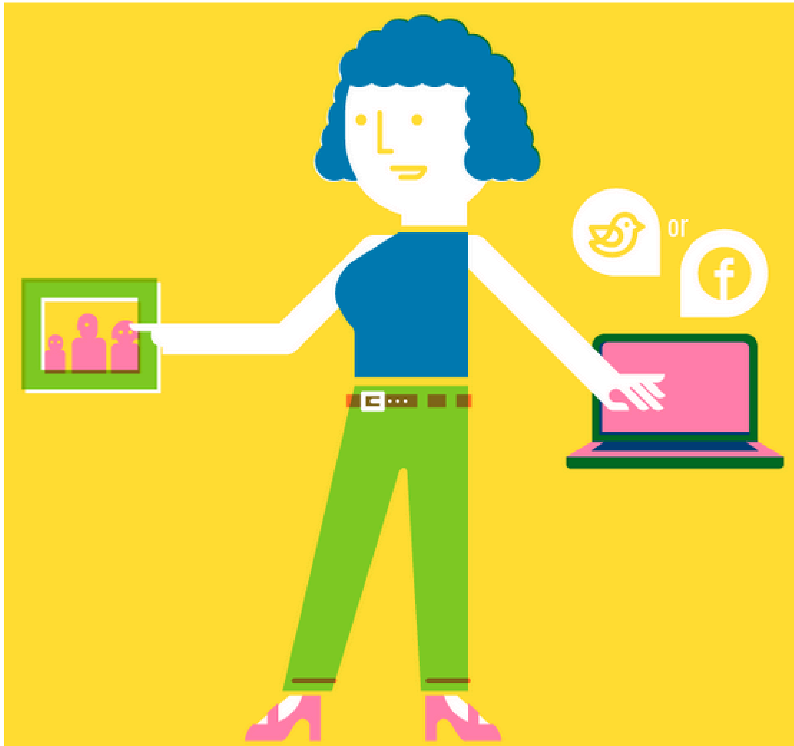
Fundraising tip: Create low-barrier opportunities to increase their connection with your brand on social networks by soliciting feedback, votes, or personal stories. This will create a constant path if information flow to this group even though their action rate on social networks will be moderate.

Photo by John Haydon from Socialbrite is licened under a CC BY-NC 3.0 licence.

Standard Consumers (Quiet-ish Majority)

- **Do I know you?** Almost exclusively get social content from friends and family members.
- **Solo-cial.** They'll either use Twitter or Facebook, but not both!

Fundraising tip: This group also needs very low barrier opportunities to increase their connection to your mission, but in this case it is more likely through a personal experience with you or by supporting someone they know with a fundraising donation.



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PART VII.

CREATIVE BRIEF

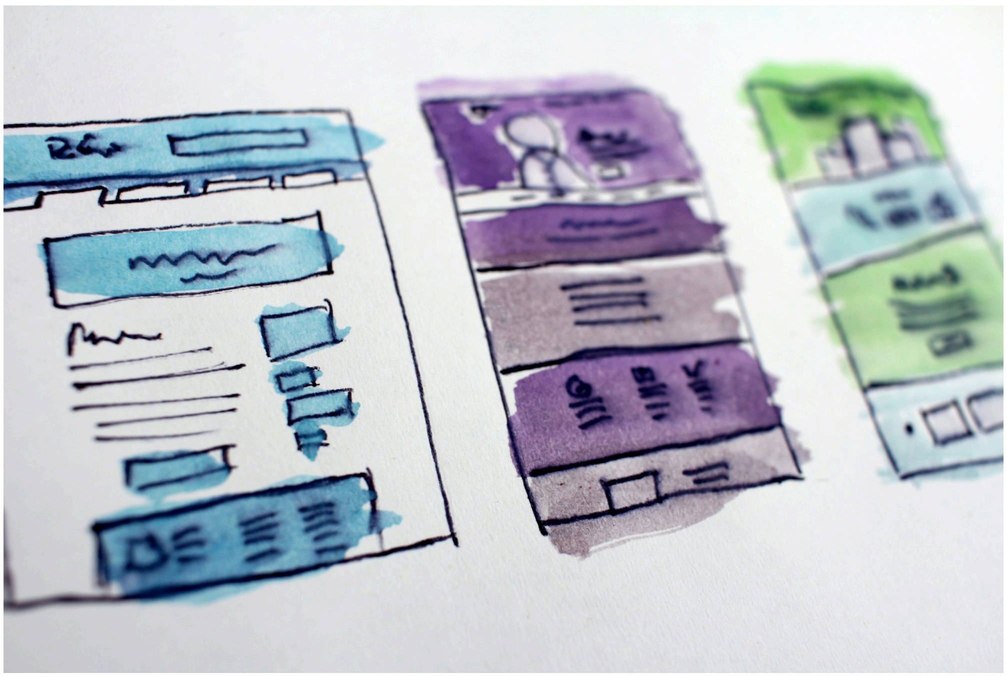


Photo by Halacious on Unsplash

Section Breakdown

In this section, you'll learn what a creative brief is and how it can be used to generate ideas as well as connect with your target audience.

The topics that this section will go over include:

- Define the creative brief and why it's important.
- Learn how to create a brief through research and what is essential in the creative brief.
- Understand site accessibility and user value.
- Compare the designs of the creative brief personas.

- Utilize your personas to customize design decisions.

Introduction

The design portion of any IMC campaign is critically important. It's the visual representation of the extensive background work and research done to put together a cohesive and complete campaign. The most important sections can be broken down into the creative brief, branding, and marketing. Each of these sections also contains several sub-sections that go into further detail.

The creative brief is the first step towards determining what your goals for the campaign are and what you hope to achieve overall. These goals should explain the intended impact you hope to have on your target audience but also your own internal objectives that you hope to accomplish.

Once you're satisfied with the overall structure of the creative brief the next stage is the branding portion of the IMC. Before you can market your campaign, you need to establish your organization's brand. This is accomplished by establishing a brand vision, logo, brand personality, tagline, brand colours, typography, and other supporting brand assets. Branding is important for an organization because it helps with recognition from the audience.

After the branding has been taken care of the next step is marketing. As an organization, it's good to know about the different tools for content creation, development of a website as well as tips for online marketing. Effective marketing tools are helpful as they will allow your organization to reach the most amount of people possible. Several tactics are available including social media or email marketing. All put together, a strong creative brief, great branding, and effective marketing will help lead to a successful IMC campaign.

CHAPTER 23.

CREATIVE BRIEF DEVELOPMENT

A creative brief is a document for the in-house creative team or external designers, and the overseeing NPO director, that provides a clear objective and explains the overall concept of the campaign in question. In other words, the creative brief is like a game plan—without it, the campaign may not be successful. Of note, a creative brief does not require the use of a particular writing style, such as AP style. However, grammar, spelling, punctuation, and concise writing are still very important. Here are several broad categories to consider when completing a creative brief.

Effective Briefs Are…

Clear about the objective

A S.M.A.R.T. Objective is Specific, Measurable, Achievable, Results-focused, and Time-bound. The objective will help provide structure and guidance throughout your assessment, ensure good communication among you and any organization members, and will better identify what you wish to accomplish.

- **Specific:** When setting your objective being clear and specific will help focus your efforts. You can use the essential "W"s as a starting point to draft your goals; including who, What, When, Why.
  Measurable: Your objective should be measurable so that you have tangible evidence you've accomplished what you set out to do.
- **Achievable:** The objective should be realistic, and possible to achieve. It may help you to break down the steps of your assessment into smaller stages, and establish a timeframe to allow you to carry out those steps.
  Results-Focused: Your objective should be aligned with the strategic outcomes of your department/organization, and focus on results.
- **Time-Bound:** Finally, you should have a target date in mind – with a deadline to work towards you create a practical sense of urgency for your organization.

Focused and direct

Clearly express creative brief helps the organization keeps an eye on all the content easily without losing direction. Use a short paragraph to summarize the content.

Logical and brutally truthful

Being truthful can help the organization know all the full truth of a matter which will solve the deep issue.

Rich with emotional insight

Having emotional insight can resonate with customers, such as Snickers expresses that "you're not you when you're hungry." Create a real insight around a consumer, or a product, or even the market.

In sync with the overall brand

Ensure that overall brand message of product, service, or organization are related to customers or prospects and remain consistent over time.

Contain consistent information of product or service

The result of information provided by the client, the agency team, and any primary/secondary research available about the product or service.
A creative brief should be brief, inspire those that read it, and be visually engaging.

Example: An Effective Brief

The following creative brief created by Abby for Townsite Brewing Co displays all the characteristics of an effective creative brief.

An accessible version is also available for download here: [Creative Brief for Townsite Brewing Inc – Accessible Version [PDF]]

CREATIVE BRIEF FOR

TOWNSITE BREWING INC

WHO

Townsite Brewery is a craft brewery located in the City of Powell River in the Sunshine Coast of BC. Townsite Brewery has gained recognition for their award-winning beers as well as having their Brewer Engineer be the only Belgian-born brewer in BC.

PROBLEM

Townsite Brewing has no distinct product awareness in Greater Vancouver.

Townsite Brewing has qualities that stand out from the competition, but the target market needs to know about these qualities in order for them to make purchases

MARKETING OBJECTIVE

Increase product awareness of Townsite Brewing beer as the Preferred beer brand choice from 20% to 30% within 12 months among craft beer enthusiasts both men and women aged 21-35.

TARGET MARKET

Men and Women
Aged 21-35, Millennials
Greater Vancouver area, city or neighbouring suburbs
Married or in a relationship
Works Full-time or is a student who also works part-time
Personal Income of $16,000-$45,000

PSYCHOGRAPHICS

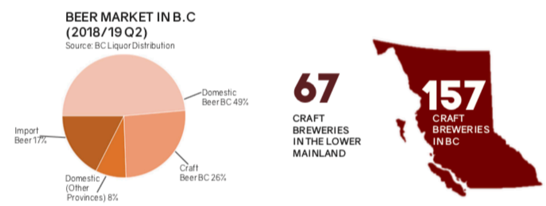
Drives a sedan but will sometimes opt for the train/bus to save money; checks Facebook daily but only as a quick news outlet; tries to cook and create meal preps for the week but will occasionally buy takeout; go-to takeout spots are family owned businesses within a 5 minutes driving radius; works full-time or is a student and attends school 2-3 days a week while working part-time 3-4 days a week; tries to save money but easily influenced and may splurge; thinks of having a beer after a long day and will drink alone or who they live with; they'll either drink a tall can or a bomber bottle; beer will be purchased from the nearest liquor store from work or home or the nearest brewery; will pre-plan special occasions and fill up a growler at the nearest brewery; typically drinks what is familiar to them but will try new brands if the price is right and if it's their preferred style of beer.

KEY INSIGHT

"I had a long day, I just want to wind down and enjoy a high quality brewed, good tasting beer."

MARKET INFORMATION

The craft brewery industry in BC is currently very saturated and has seen it's largest growth within the last 5 years as **42** new breweries entered the market in the Lower Mainland region. Also, Tax increases in beer has added to the overall cost, leaving the Target Market mindful of which beer brands are priced higher or lower compared to the industry average or their preferred brand.



Creative Brief for Townsite Brewing Co. Page 1. Click to view image full size.

PRINCIPLE COMPETITORS

Four Winds - Delta | Brassneck- Vancouver | Yellow Dog - Port Moody | Twin Sales - Port Moody | Field House - Abbotsford

MARKETING CHALLENGE

With the craft beer market being very saturated, this gives the target market a lot of options when choosing what beer to buy.
The target market may perceive Townsite Brewing as "just" another brewery of BC and not resonate with the messaging.

Craft beer enthusiasts are aware that distribution is limited with less established breweries, thus shelf time and turnover of the product is highly considered before the final purchase of the consumer.

CREATIVE OBJECTIVE

To position Townsite Brewery in a way that will resonate with busy millennial craft beer enthusiasts.

KEY MESSAGE/BENEFIT

Townsite Brewing brews high quality, good tasting beer.

SUPPORT CLAIMS

Townsite Brewery has a Brewer Engineer that is Belgian-born, has studied in Brussels and who was also previously the head of Brewing Operations at well known Montreal brewery, Les 3 Brasseurs.

Won numerous awards for their beer beginning from when they first opened their doors in 2012 until 2017.

Townsite Brewing also partners with local artists from the Sunshine Coast to create the art work for their labels. The quality is not only in the beer itself, but the packaging of the labels and the creative community referenced beer names.

PERSONALITY/TONE

Friendly, easy going, approachable, relaxed

POSITIONING

To Millennials who need a go-to beer brand after a busy day, Townsite Brewing is a craft brewery that gives you high quality, Belgian brewed, artisinal beer to give you the perfect wind down thirst quench.

EXECUTIONAL MANDATORIES

Logo, core colours where applicable, Powell River should be stated.

TACTICS

Channeling lifestyle as well as interaction/brand experience. As if drinking their beer makes the consumer feel like they are in Powell River, drinking directly in the tasting room, having great conversations with the locals at Townsite Brewery. Townsite Brewing is more than just beer, it's a beer community.

MEASURING RESULTS

Results will be measured via a survey and in the amount of net sales. If the objective of increasing brand awareness has succeeded, there will be an increase in net sales and in brand awareness. A survey was conducted prior to this marketing initiative. Only 24.4% of the people surveyed have heard of Townsite Brewing.

Creative Brief for Townsite Brewing Co. Page 2. Click to view full size.

Make sure your creative brief is complete, descriptive and thorough with convincing information. It should also include:

- A compelling offer for the creative team to work on or provides them with guidelines so they can develop a solution to your problem
- A focus on your audiences' needs instead of your own

Depending on the project, your creative brief may include:

- Executive Summary
- Marketing Communication Goals
- Marketing Objectives
- Target Audience Profile
- Unique Selling Proposition (USP)
- User Value Proposition (UVP)

- Brand Personality
- Marketing Strategy
- Marketing Materials

Templates

The one-page creative template linked below provides an overview of the elements that make up an effective creative brief and an area you can fill with information to meet the needs of your campaign:

- One-Page Creative Brief Template

A creative brief can also be presented in a more visual format, through a PowerPoint presentation. The link below provides a sample template that you can download and edit for your campaign:

- Creative Brief Presentation Template

Continued Learning

If you would like to expand your learning on Typography please reference the links below! It gives an overview of common types of fonts, how to use them and how to choose the right font for your brand.

1. The Paypal Creative Brief is a great example of a creative brief that allows the creative team more freedom. Note how this creative brief clearly states the problem Paypal is attempting to resolve as well as their end goal. This creative brief also includes a summary of Paypal's target market as well as key insights while remaining succinct and visually engaging. Having a clearly defined problem and desired end goal will help guide the creative team to create a unique solution that can connect with the identified target audience.
2. The "Quaker Oats Creative Brief " is a great example of a creative brief with a specific desired outcome. Note that while this creative brief appears to start the same as PayPal's creative brief, Quaker Oats adds a clear set guideline regarding the problems they want to be addressed as well as potential ways to resolve these problems. This creative brief is also data-backed and provides key insights about their target market to maintain engagement and inspire the creative team. The creative brief is engaging in this way, because Quaker Oats knows exactly the type of campaign they are looking to execute, to resolve their problem and connect with their audience.

Attributions:

This page contains material taken from:

Grigg, T. (2008, April 27). The 7 Essentials of the Direct Marketing Creative Brief. Retrieved from https://www.dmcgresults.com/blog/the-seven-essentials-of-the-creative-brief

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CHAPTER 24.

DESIGNING FOR YOUR AUDIENCE I

Consider Accessibility

A big factor in marketing to a wide range of audiences is being considerate of any and all differences. A part of inclusivity is considering all forms of inaccessibility.

"Solve for one, extend to many"

– Microsoft | Inclusive Design

This could be a person with a hearing impairment, a senior with partial blindness or someone with a cognitive disability, the reasons for inaccessibility are circumstantial but can be very prevalent in many commonly known "abled" people's lives. Websites that lack accessibility can be very unaccommodating and can leave those who need it with fewer options in terms of online contribution. You can help normalize their experience when you consider other methods for completing forms or receiving and understanding content when they are able to make an impact for your organization because you made an impact on their experience, you are creating a strong relationship with your supporters from all categories. Below are two examples of companies that have adopted inclusivity practices in their development and research process.

Example: International Business Machines Corporation (IBM)

IBM is an international company that is known to have extremely high standards when producing its technologies and adhering to government-mandated standards. They are considered one of the first technology companies that even considered hiring people with a disability. With over 100 years of experience in creating solutions for accessibility, IBM has developed a work culture and mindset for employees to always explore opportunities in creating an inclusive experience. In fact, implementing accessibility principles at every stage of development has become such a core value at IBM that every employee, whether they work in design, functionality, or sales, will need to receive training to ensure all users and customers are being accommodated. IBM is also a strong advocate in hiring and building an accessible workforce. Many employees with disabilities have been promoted and emerged as leaders at IBM.

Example: The Sustainable Development Goal – Reduced Inequalities (SDG #10)

One of the seventeen United Nations Sustainable Development Goals is Reduced Inequalities (SDG #10). So what is the goal of SDG #10 and why is it important?

The goal is to reduce inequalities within and among countries so that the world will become a more inclusive environment for all individuals. In 2013, Google launched the Google Impact Challenge, an initiative to make the digital world more accessible for people with disabilities. This initiative focuses on improving the auto-complete function, machine learning for auto-captioning, modifying colour contrasts for people that have low vision, voice control and artificial intelligence to provide visuals for blind users. Today, Google continues to develop its artificial intelligence so that its non-language processing is able to continuously adapt, grow, and inform all users the ability to understand language beyond human speech. They also fund nonprofit entrepreneurs and communities around the world to ensure new technology is inclusive of marginalized communities.

Learn more about this Case Study: How Designing For Disabled People Is Giving Google An Edge

Consider Values

Photo by Anna Earl on Unsplash

An NPO can create value, or benefits, for customers by solving a problem, satisfying a need, or rallying for change. Referring back to the creative brief, the **user value propositions (UVPs)** are the reasons that allies choose one option over another when deciding how to contribute. Their choices may be influenced by intangibles like convenience, accessibility, and risk reduction or physical/tangibles like brand, design, newness, performance, customization, and price. Refer back to the Spectrum of Allies and consider what kind of values does each group benefits from? What causes them to shift from a neutral to a passive ally and finally to an active ally?

> *"When we understand what our users value, design can effectively communicate those values back to our audiences and influence them to affect change."*

To help you consider what your allies may value from your NPO, ask yourself these questions:

- What problem are we solving?
- Why do our allies interact with or donate to our non-profit organization or campaigns?
- What do we provide our allies?
- Do our allies value emotional benefits or satisfaction?
- Are there any physical/tangible benefits?

Attributions:

This page contains material taken from:

Accessible Educational Materials. (n.d.). *Accessibility Standards, Specifications & Guidelines*. Retrieved July 29, 2020, from National Center on Accessible Educational Materials: http://aem.cast.org/creating/accessibility-standards-specifications-guidelines.html

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Women's March [@womensmarch]. (2020, May 26) Weaponized whiteness hurts everyone. It takes interpersonal racism and transforms it into structural racism. It kills Black people. [Tweet]. Retrieved from https://twitter.com/womensmarch/status/1265372407352655882

CHAPTER 25.

DESIGNING FOR YOUR AUDIENCE II

Recall the earlier sections from this open textbook where the concepts Personas and the Spectrum of Allies were discussed. Through understanding the differences between active and passive personas, and how to categorize key players will enable an NPO to effectively shift support to the organization during a campaign. The next step is to apply these concepts to action so that you can develop a stronger understanding of your audience's behaviour as well as their needs and wants.

Example of a Creative Brief Persona

1. Recall our persona examples

Passive Ally Persona: Multichannel Consumers (Social Connoisseurs)

- **Offline too!** Reach them at offline touch points and invite them to participate in online social media.
- **Friendlies.** They influence to some extend via normal friend-to-friend engagement.
- **Takin' it easy.** Due to their level of activity, their sphere of influence is not a dominant part of their persona.

> **Fundraising tip:** Create low-barrier opportunities to increase their connection with your brand on social networks by soliciting feedback, votes, or personal stories. This will create a constant path if information flow to this group even though their action rate on social networks will be moderate.

2. Create a persona card to inform your design decisions

Persona Card

Photo by Justin Essah on Unsplash

"Donations are effective. They progress movements and advance change in society."

Background

Eris is a marketing graduate, devoted to philanthropy and supporting local initiatives. Her motivations are personal and she believes in social good. She volunteers weekly at Apathy is Boring, mentoring youth and speaking from her experiences.

Relationship with Technology

Will use for professional connections (LinkedIn, Facebook, Twitter).

Wants

- Staying busy and mentoring youth
- Racial justice
- Diversity in our communities and peace in the world

Pain Points

- Being provided with too few options
- Waiting in lines for anything and wasting time
- Skeptical of corporate messaging that seems ingenue or inauthentic

Hobbies

Mindful meditation and/or yoga

Critical Thinking

What other aspects make up Eris' persona? What is her typical day to day? How does she get involved with NFP organizations.

3. Create your designs – informed by steps 1 & 2

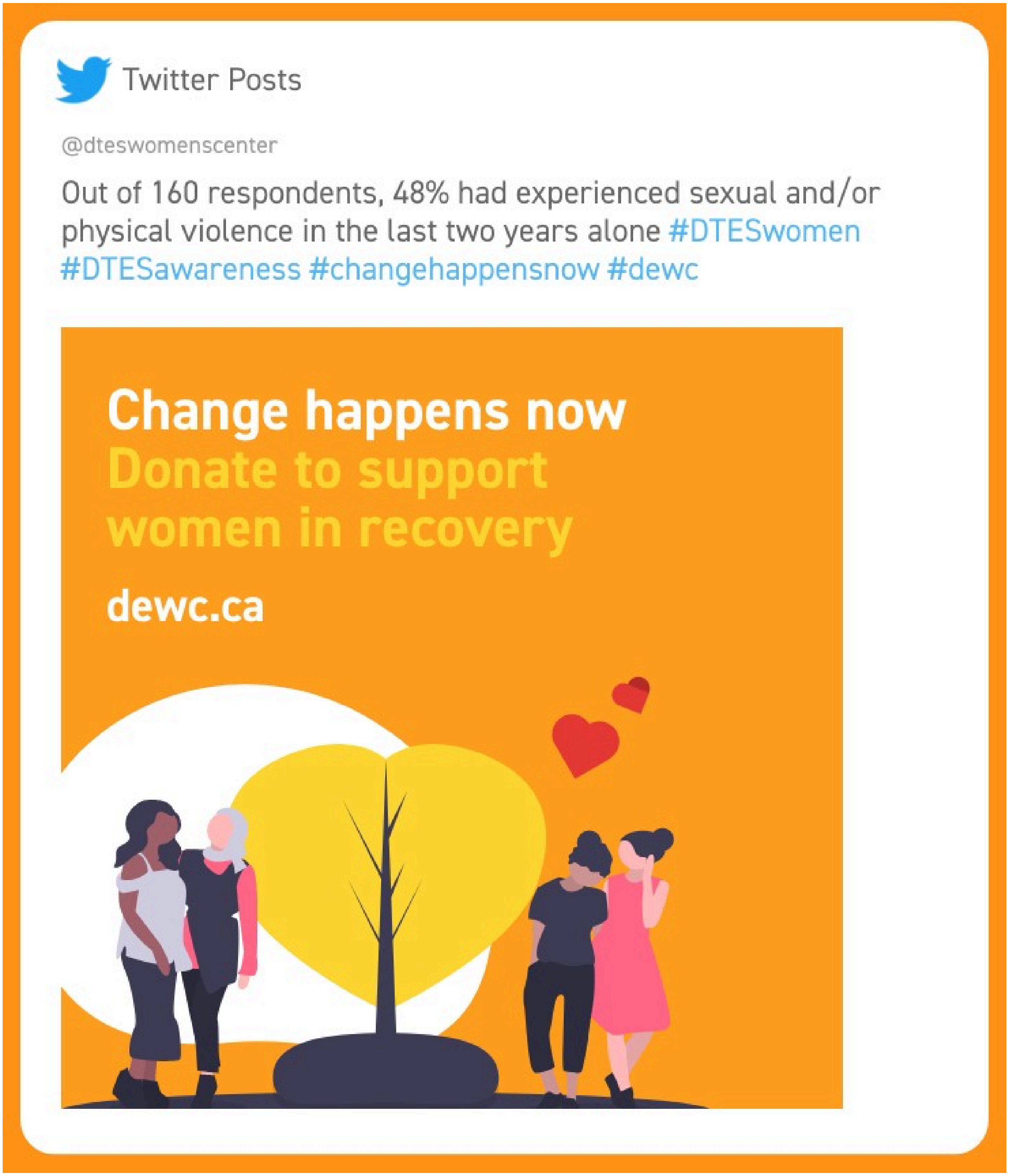
- Persona considerations
  - Enjoys multitasking but hates wasting time
  - Prefers visuals over text
  - Skeptical of corporate messaging (inauthentic)
- Campaign design
  - Highly visual
  - Clear and concise messaging
  - Storytelling messaging from real people (authenticity)
  - Call to action for medium-level engagement

Example: Facebook post

Consider values:

- Using imagery that represents the cause that you are supporting can be more authentic and resonate with your audience.
- Consider other value propositions that your allies may be interested in. If they do not feel that monetary donations can impact your cause, they may feel more compelled to purchase a community support package instead. Remember to provide different levels of engagement.

Example: Twitter post



- Messaging can tell people something new, something they had not thought about. Passive allies are social connoisseurs who take it easy with influence. Informing and educating is a good design solution for the intended audience. The content design of this twitter post is shocking and may spark conversation/further engagement as well.

- Call to action: To match Eris' persona that is based on the passive ally, "Donate" is a call to action that engages her (as a philanthropist) in the visual. Additional messaging in the Instagram post could expand on where to donate.

Consider Tactics and Channels

Tactics have to do with the strategies/steps that need to be taken in order to achieve the end goal, and the channel is the path on how to get there. Upon reviewing the examples above, it is evident that personas and user values can play a large role in the design decision-making process because these groups of individuals are ultimately what drives an organization to keep moving forward. All the research on who you are targeting can also inform which tactics and channels you will choose to move forward with. Before you design, consider these questions:

- Which channels do your participant communities have access to?
- Which channels does your target audience/s follow the most?
- Which channels can best carry your message?
- Which channels will be most likely to encourage people to take action?

Examples

- If you are trying to reach the youth about a climate change rally, will you use e-mail marketing to contact them? Unlikely, as it would be more effective to use social media such as Instagram or TikTok and partner with online influencers with a large audience to promote climate change. Remember you can use a combination of deliverables and tools to spread your campaign message to different audiences.

- While you may send out video footage of human rights violations to national television stations, to ensure they receive widespread general attention in your country, you could also have a blog or Twitter platform that regularly updates your global audience about new footage you have obtained, provides information regarding where it has been broadcast and shares responses you have received from audiences, relevant organizations and government bodies.

In the next two sections: Branding and Marketing, we'll go more in-depth into how to design your brand and campaign based on all of the research you've done up until now.

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"Empowering Women Artisan Market" is copyright (c) 2013 Burke Museum. This work is licensed under a Creative Commons Attribution-NonCommercial 2.0 Generic License

Roberts, J. (n.d.). Creative brief. Retrieved May 28, 2020, from https://ohiostate.pressbooks.pub/stratcommwriting/chapter/creative-brief/

PART VIII.

BRANDING

Section Breakdown

In this section you will learn about the importance of establishing a brand and all of the elements needed to create a successful brand.

The topics that this section will go over include:

- Understand the importance of a mission statement
- Learn the important parts of a visual identity
- How to implement a brand identity and personality
- Understand all the elements that come together to make a brand

CHAPTER 26.

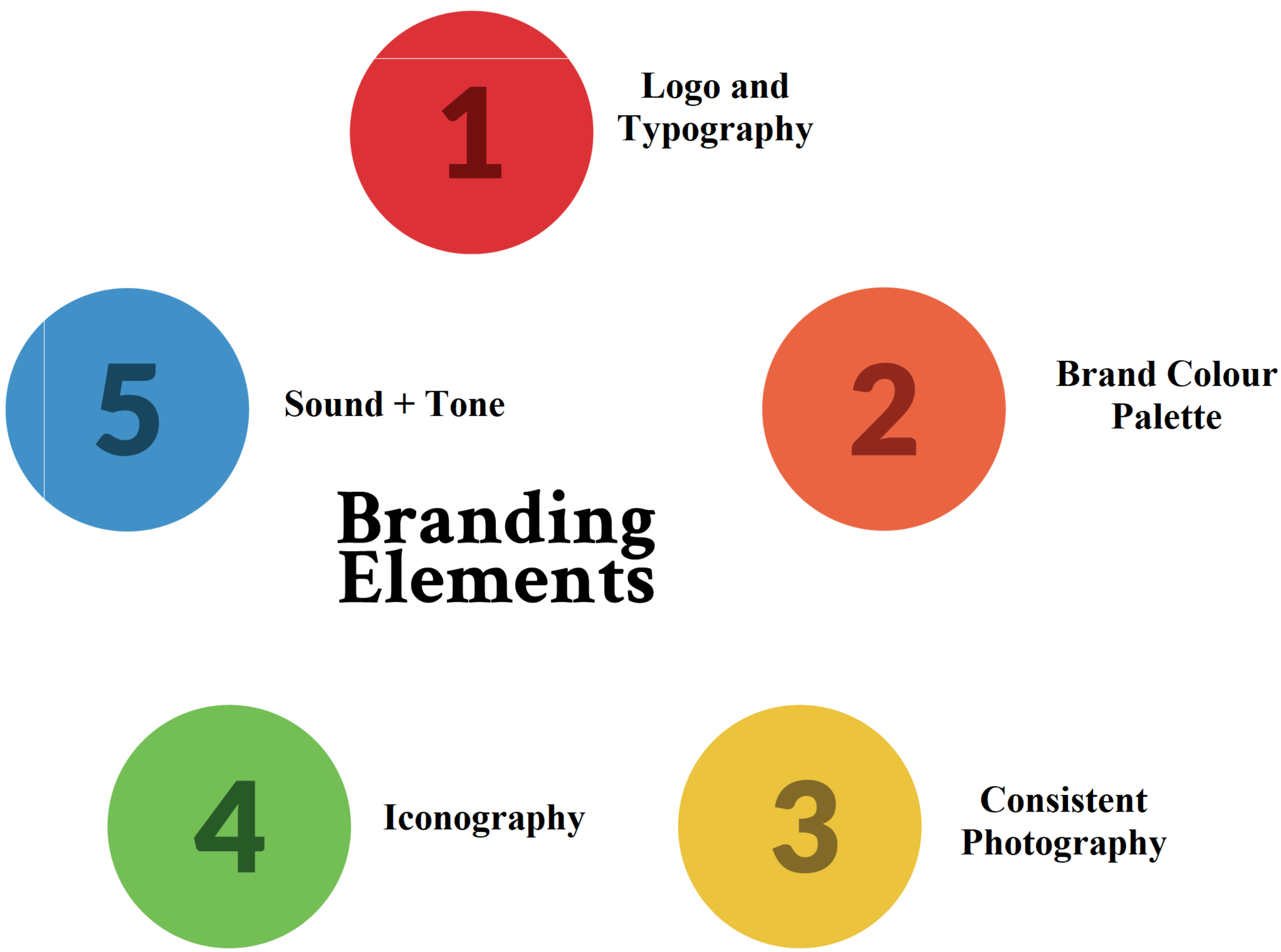
BRANDING

Once the creative brief is completed, the next step is Branding!

So What is a Brand Strategy?

Branding strategies help you define what you and your business stand for. This is the main contender that defines your business from your competitors. Making smart branding decisions up-front is crucial since it will be on all visual aspects of your business everywhere.

Branding Elements



Brand Image

When people can recognize a nonprofit through visual signifiers like logos, slogans, and colours, this is when you know that you have successfully made your brand easily identifiable. The outward expression of am organization, including its name, trademark and visual appearance, is the identity.

This is in contrast to the brand image, a customer's mental picture of a brand. Brand Image includes:

"What is the impression we give to our supporters?"

- What is the brand essence of your new nonprofit organization?
- The brand essence is the foundation of your NPO's true identity and the brand essence typically stays the same over time.

"Does the visual identity represent the brand character?"

- The consumer perception of brands is brand knowledge: brand awareness, recognition and recall, and brand image denote how consumers perceive a brand based on quality and attitudes towards it and what stays in their memory.

Throughout the next few chapters you will find more information on what makes up a brand and how to implement it.

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This page contains material taken from:

Brand identity. (n.d.). Retrieved from http://oer2go.org/mods/en-boundless/www.boundless.com/definition/brand-identity/index.html

CHAPTER 27.

BRAND VISION

The Power of Brand

Brands are powerful. When you explain why a brand is your favourite, you probably identify some of the traits or features of its products or services that explain rationally what makes it better than others. But rational explanations are just part of the story. Strong brands are powerful because they also tap into emotions. They make you feel a certain way, and that feeling is hard for any other brand to replicate—let alone replace. This leads us to our unique selling proposition.

Grab a piece of paper and jot down answers to the following questions:

1. **What is your favourite brand of clothing?**
    - Why is it your favourite?
    - List a word or phrase that describes how this brand makes you feel
2. **What is your favourite charity?**
    - Why is it your favourite?
    - List a word or phrase that describes how this charity (which is also a brand) makes you feel.
3. **What is your favourite local community place to stop for coffee, donuts, a bagel, or some other snack?**
    - Why is it your favourite?
    - List a word or phrase that describes how this place (which is also a brand) makes you feel.

Set the paper aside for a moment and keep reading. We'll come back to it.

Create a Mission Statement

- Take the why of a vision statement and provide a broad description of how a movement will advocate its social cause to make its vision a reality.
- The overall guiding force that inspires a movement is the delivery of a not-for-profit organization's (NPO's) mission. The mission contains the primary direction for an NPO's movement, including who your audience is, where you're located, and who are partners that help your movement get off the ground, overcome obstacles, and reach new heights. In a

brand new organization, though, where does that mission come from?

Starting from scratch? Follow these mission statement guidelines

1. Clear & Simple Language
2. Inspire, Motivate & Unify others
3. Describe Organization Goals
4. Explain Intended Impact (the why)
5. Easily Recognizable & Explainable
6. Distinguished Vision Statement

Questions to ask yourself?

- What do we do?
- Who do we serve?
- How do we serve them?

Examples: Mission Statement

- Plan International (Because I am a Girl): "Plan International Canada works for and with children, community members and governments so that all children around the world can exercise their rights. We do this by focusing on eight core areas, with gender equality as foundational objectives. Our work seeks to tackle the root causes of gender inequality and remove barriers that keep children, especially girls from reaching their full potential."
- BCSPCA: "To protect and enhance the quality of life for domestic, farm and wild animals in British Columbia"

The Vision for your Organization

- Broad expression of what a not-for-profit organization's (NPO's) founders want a movement to accomplish.
- The vision statement is usually very broad, and it does not even have to mention social cause of movement. The vision statement does not describe the strategy and the organization will use it to follow its vision. It is simply a sentence or two that states why the NPO exists.

Guidelines for a vision statement

1. Use Concise & Unambiguous Language
2. Aligned with Personal & Social Core Values
3. Use Present Tense

4. Inspiring & Exciting
5. Provide Guidance while being short and sweet
6. Distinguished from Mission Statement

Questions to ask yourself

- What are the organization's hopes and dreams?
- Who do we serve?
- Who and what is our organization trying to inspire?
- What are our movements WHY?

Examples: Vision Statements

- Kids Help Phone: "A future where every young person in Canada will access the support they need, in the way they need it most."
- Canadian Red Cross: "The Canadian Red Cross is the leading humanitarian organization through which people voluntarily demonstrate their caring for others in need."

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CHAPTER 28.

BRAND PERSONALITY

Photo by [Vlad Tchompalov](#) on [Unsplash](#)

Brands have a personality. Branding, according to Lois Geller, is an ongoing process of looking at a company or product's past and present to create a cohesive personality going forward. Branding is your organization's representation as a personality, in Dave Kerpen's words. A well-designed brand personality resonates in everything the product or business does from customer service to the actual products a company may offer.

The meaning of a brand in the consumer's life is derived from the positioning of the brand and the image formed by the brand in the consumers' minds. This image depends on brand personality. Perhaps the most important consideration when creating a brand personality is whether or not there is a close relationship between the personality traits of the target consumers and the brand personality thought to be formed. The brand purchasing behaviour and brand loyalty highly depend on the extent to which brand personality is similar to the personality of the consumer's or someone of whom the consumer is a fan. Brand personality is a strategic tool that shapes the brand's communication with consumers.

Brands can reflect and communicate themselves through their personalities in the minds of consumers. The brand personality becomes a key concept at this point to establish closer and more loyal relationships with the consumers or to be differentiated in the consumer's mind. Brand personality refers to the common style and attitude that the brand would use for transmitting its message. In this sense, brand personality is a very important factor in establishing an emotional bond. While creating the brand personality, it is necessary to consider the consumer's preference for the brand depending on the situation and conditions and to determine the appropriate image and emotional forms.

Brand Adjectives

A Brand Personality Exercise

Choose 4-7 words you feel best describe your organization and write them down. Describe what this adjective means for your organization and your supporters. Keep these on file to reference during the rest of the branding process.

- Adaptable
- Gentle
- Adventurous
- Helpful
- Agreeable
- Honest
- Aggressive
- Imaginative
- Ambitious
- Independent
- Analytical
- Inspiring
- Approachable
- Intelligent
- Authoritative
- Innovative
- Bold
- Knowledgeable
- Casual
- Mature
- Cautious
- Modern
- Charismatic
- Organized
- Clear
- Playful
- Clever
- Pleasant
- Collaborative
- Practical
- Colourful
- Professional
- Competitive
- Proud
- Confident
- Quirky
- Conservative
- Radical
- Contemporary
- Rebellious
- Cooperative
- Reliable
- Courageous
- Savvy
- Creative
- Serious
- Critical
- Sleek
- Curious
- Sophisticated
- Determined
- Straightforward
- Demanding
- Strategic
- Direct
- Striking
- Edgy
- Strong
- Eccentric
- Social
- Encouraging
- Stubborn
- Energetic
- Supportive
- Enthusiastic
- Sustainable
- Fierce
- Trendy
- Flexible
- Trustworthy
- Formal
- Unconventional
- Fresh
- Urban
- Fun
- Visionary

Additional Learning

Read more about developing a brand personality: [Adjectives that can Define your Brand Personality]

Once You Have Your Adjectives

1. Brainstorm what the chosen adjectives have in common
2. What visual signifiers may help in the logo and tagline process
3. Draw/create 2-3 mood boards of visual signifiers
4. Compare the mood boards to create a theme/ style for your brand

Brand Experience

It is important to consider how your brand is consistently conveyed in your brand experiences and how your audience perceives these experiences. Brand experience is conceptualized as a multi-dimensional construct and defined as "sensations, feelings, cognitions, and behavioural responses evoked by brand-related stimuli that are part of a brand's design and identity, packaging, communications, and environments" (Brakus et al., 2009; Khan & Rahman, 2015).

We often find ourselves getting so caught up in our business strategies, schedules and plans that we sometimes forget to appreciate what people actually want or expect from these experiences. To avoid this from happening, one of the best methods is to think of the brand experience as an ecosystem that surrounds a brand and that every element within that ecosystem has a part to play in encouraging customer loyalty.

The ecosystem that surrounds a brand can be described using the following 7 P's of the extended marketing mix:

1. **Product** – The product or service offering needs to be relevant to the consumer and most importantly, match what they expect.
2. **Place** – Whether the store is on the high street or online, the location should be ideal and conveniently located for the consumer.
3. **Price** – The price should take the target audience into account and should be perceived as value for money, regardless of the expense of the product or service.
4. **Promotion** – Advertising and promotion need to be consistent and communicated via the most relevant channels for the consumer, such as social media or email.
5. **People** – Every person that represents the brand, from the admin assistant through to the Managing Director needs to be the right fit.
6. **Process** – The process, from the consumer finding the store to receiving the product or service, needs to be as streamlined as possible.
7. **Physical Evidence** – The consumer needs to see tangible evidence of their purchase, whether

it's the physical product or the end result of a service.

Examples of brand experience touchpoints can include:

- Social media interactions
- First impressions on your website
- Customer experience
- Membership or loyalty programs
- Events or activities tied to the brand
- Word-of-mouth marketing from your customers
- If you go back to your responses, can you think of how brand experience touchpoints have helped you create an impression of a brand? Can you think of any additional touchpoints that you might have in your own brand or organization?

Research has proven that a brand's experience can strongly impact brand reputation. In a study focusing on smartphone brands, "when the consumer is exposed to too much or less technology turbulence, free expression of the behavioural brand experience strongly impacts a brand reputation." If each element of the marketing mix is carefully considered and executed effectively, then customers are more likely to have a positive brand experience, which strengthens customer loyalty.

Companies can do a lot to create and build brands, but the net impact and value is what happens inside the mind of the consumer. The supreme challenge of a brand is to make your vision of your brand the same thing other people experience and believe about your brand.

Additional Learning

Read more about Jamie's first impressions of Hotel Chocolat's brand experience and how the 7 P's of the extended marketing mix are utilized at Baker Stuart: Why Brand Experience Strengthens Customer Loyalty

Brand Messaging

Organizations must also determine what type of appeal to use and how to structure their messages. Some of the common campaign appeals within non-profits are emotional, rational (informative), and environmentally conscious. These appeals make each campaign memorable. A guideline is to establish a company image that clearly reflects the values and the aspirations of the company to employees, customers, intermediaries, and the general public.

Firms also decide whether to use strategies such as an open-ended or closed-ended message; whether to use a one-sided or two-sided message; and whether to use slogans, characters, or jingles. An open-ended message allows the consumer to draw his or her own conclusion, such as a commercial for perfume or cologne. A closed-ended message draws a logical conclusion. Most messages are one-sided, stressing only the positive aspects, similar to what you include on your résumé. However, two-sided messages are often utilized as well.

Another large factor in determining your message is determining its tone of voice. A brand's tone of voice is the communication it takes with its targeted audience. It is how you want to express your brand in all areas of key messaging and customer touchpoints. Use the worksheet "Determining Tone" for your own non-profit and No HungerBC to generate your own messaging ideas.

Channels and Accessibility

Choosing the channels you promote your brand through is important because it contributes to your brand image in your audience's minds. Social marketing is a term used to describe marketing that aims to reach a social objective. A good example is the American Heart Association (AHA) where they used doctors' offices to promote their brand to their audience. The AHA created a book containing their healthy diet plan and sent copies to doctors to distribute to their patients. By distributing through the doctor's offices audiences connect the brand to their trusted doctors.

Accessibility for a campaign is important in order to reach all key audiences. For example, digital campaigns on social media are very popular however, they may not reach all audiences such as the older demographics including seniors.

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CHAPTER 29.

NAMING EXERCISE

Photo by You X Ventures on Unsplash

Naming your brand is very important if you want it to succeed!

Consider the function of a brand name: It identifies a product, service, or company and differentiates it from competitors. But it does much more than that. The introduction of a brand name can either generate attention or make the offer completely forgettable.

Naming can be difficult in the crowded, increasingly global marketplace in which businesses operate today. As you understand the role of naming and the systematic process for selecting a new brand name, you can help lead your organization in making wise, informed choices about this essential element of branding. Here are the steps to take for naming your organization:

Define What You're Naming

Define the personality and distinctive attributes of the company or product to be named.

Check the Landscape

Scan the competitive landscape to identify brand names already active in the category, to avoid selecting a name that would easily be confused with competitors.

Brainstorm Ideas

Engage a naming team to brainstorm ideas and generate potential brand names. Due to the challenges of identifying a unique, protectable name in today's global market, the naming team should include some members with prior naming experience. Often companies hire specialty naming firms to add creative power and expertise to the process. The team should generate lots of ideas, knowing that the vast majority will fall out during the screening process.

Example

As a case study, we are going to develop a brand for a British Columbia based food bank with a fresh food program. The brand objectives are based on the United Nations Sustainable Development Goal number 2: Zero Hunger.

Our process involves two paths, brainstorming a descriptive name, as well as a more abstract name. Starting with the descriptive avenue:

- Eradicating Hunger BC
- No Hunger BC
- Growing Past Hunger
- BC Food Collective
- Food for BC
- Weed Out Hunger

Next, we brainstormed for a more abstracted name:

- Uproot
- Evergreen
- Habitable
- Cultivate BC

Screen and Knock Out Problematic Names

Screen favourite names to make sure they are available to use perceptually (no mind-share conflicts with other known brands), legally (no trademark conflicts) and linguistically (no problems in translation).

- **Perceptual screening:** Start the screening process with thorough Google searches on the names being considered to eliminate any that could easily be confused with established players in your product or service category or a related category.
- **Legal screening:** The next screening process is to evaluate potential conflicts with registered trademarks that exist in the product or service categories in question.

Photo by KOBU Agency on Unsplash

Check Domain Name and Social Media Availability

If you want to operate a web site or social media using your new brand name, you will need an Internet domain name for your web site, as well as social media accounts. As you are refining your shortlist of cleared names, check on the availability of domain names and social media handles. If you're lucky, a clear .com domain will be available to reserve or purchase at a reasonable price, and a clear Twitter name will also be available. Here are some tips for navigating this process:

- Use a reputable registry to check availability. When you're checking on domain-name availability, don't just Google domain names at random. Instead, use a reputable domain-name registry like Godaddy.com or Register.com.
- Look at variations of your chosen name(s). Consider reserving domain-name variations of your chosen brand name(s), either because the original names you want are not available, or because you may want to control close variations to avoid letting them fall into the hands of competitors or Internet profiteers.

- Before you settle on a final domain name for your brand, make sure you investigate where common misspellings of your name might take site visitors.
- Reserve domains in geographies where you plan to do business. Consider whether to reserve domain names using different extensions. In other words, not just yourbrand.com, but also other extensions including those in other countries where you plan to operate: your-brand.mx for Mexico, yourbrand.cn for China, yourbrand.ca for Canada, and so forth. If you plan to do business in multiple countries, it is wise to reserve domain names in each of the countries that are strategically important to your company.

Customer-Test Your Final Short-Listed Names

It is always wise to conduct market research to test short-listed names among your target customers. This gives you insight into how they will hear, interpret, and think about the names you are considering. Customer testing can reveal nuances or connotations of a name that didn't occur to the naming team earlier–for better or for worse. Customer testing results can also be a great tie-breaker if the naming team is split between finalists.

Make Your Final Selection

Ultimately the naming team should select the name with the most potential for creating a strong, differentiated brand, combined with the least risk from a trademark ownership perspective.

Examples

Going through this process, it's time to make our final selection for the name of our BC food bank. The basis for our selection came down to the need to have a descriptive name that immediately conveyed what the organization was about. That is what we determined would stand out the best in the BC market, and it tested the most positively with potential stakeholders:

- Eradicating Hunger BC
- No Hunger BC
- Growing Past Hunger
- BC Food Collective
- Food for BC
- Weed Out Hunger
- Uproot
- Evergreen
- Habitable
- Cultivate BC

No Hunger BC will become the name of our organization as we continue to develop the branding.

Take Steps to Get Trademark Protection for Your New Brand

Once a final name is chosen, engage a trademark attorney to file a trademark or service mark registration for the new brand. Ask for legal counsel on where to register your marks based on where you plan to operate globally. While this step may seem expensive and time-consuming, it can protect you and diminish the risk for the organization if your brand name is ever challenged legally. Down the road, it is easier to enter into licensing and other types of agreements if a brand name is registered. Licensing can be a lucrative strategy for strong brands.

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Lumen Learning (n.d.). Retrieved June 8, 2020, from https://courses.lumenlearning.com/cochise-marketing/chapter/reading-name-selection/

CHAPTER 30.

MARK/LOGO

Developing a Mark for Your Brand/Campaign

Marketers rely on branding to associate aspirations, attributes and values with functional products and services. The resulting relationships mean target audiences are drawn to the offer as much for its symbolic value as for its utility (Aaker, 1997)(van Osselaer & Janiszewski, 2001). Repeated pairing of branded collateral with positive contexts, colours and symbols create favourable and brand-specific connotations, to the point where a brand alone eventually evokes those associations and the benefits assumed to follow (Nord & Peter, 1980).

Consumers use physical brand attributes to construct imagery that they draw on and personalize; ultimately, brands help consumers to co-create an identity they project to others (Belk et al., 1982). Known as symbolic consumption, this process involves consumers forming relationships with brands, which they use to structure and create meaning in their lives (Gendall et al., 2012).

In developing a mark for No Hunger BC, boldness and repeatability were key considerations. Primarily typographic logos offer a level of urgency and flexibility that can be beneficial for non-profit brands and campaigns. No Hunger BC is a food bank organization with a fresh food program, which is why the carrot icon was introduced to the wordmark. Even simple marks can convey a brand's story and goals.

Logo Variations

Once a mark has been developed, you need to set up a set of brand guidelines that explains how the mark should be used in a variety of contexts. It's a place to present the logo for you brand or campaign along with it's variations. It's helpful to create links to download the logo file so other members of your team can also access it. Files recommended are .jpg and .png files, as well as a .svg file which allows the mark to be opened and scaled as a vector.

Primary Logo

Download Link:
.png
.jpg
.svg

Reversed (White)

Download Link:
.png
.jpg
.svg

In some cases, you will utilize multiple iterations of a logo for different contexts. It's important to also provide the files for those versions so your brand is presented the way you envisioned it.

In the below example, No Hunger BC created a secondary application of the logo to more prominently display their icon, which could be used for social media or other web/small scale applications. Download links are also provided for these files.

Icon with Wordmark

Download Link:
.png
.jpg
.svg

Reversed (White)

Download Link:
.png
.jpg
.svg

If you have more iterations of your logo, you can continue to list them. Just be sure that you're clear on the contexts they're supposed to be used in and what the limitations are.

The below example is a horizontal application that could be utilized when design space is limited, such as footers, web banners and posters.

Horizontal Application

Download Link:
.png
.jpg
.svg

Reversed (White)

Download Link:
.png
.jpg
.svg

Brand Guidelines

Once you have given your team access to the brand mark, it's important to provide context on how that mark should be applied. Logo usage guidelines might include the minimum clear space necessary around a logo, guidelines for presenting the logo alongside corporate partners, as well as rules against skewing or rearranging the logo which can damage brand continuity. But really, there are a number of different guidelines a set of brand standards could display. It's important to look at the nature of your NPO and brainstorm how your branding might live in the world.

Below is an example set of guidelines for No Hunger BC based on the needs of their organization.

Don't Change Colour

In most cases, it's important for the colour of the logo to stay the same to promote continuity. For No Hunger BC, they only use one colour for the logo, and it must always remain the same. The only exception is when the logo is reversed onto the specified orange background, in that case it becomes white.

Don't Fill the Icon

The carrot icon is the defining mark of the brand, so it must never be filled in. In cases where the mark is going to be presented small enough so that detail of the carrot may be hard to make out, an alternative has been specified in the brand guidelines that incorporates a larger icon.

Don't Condense to Two Lines

No Hunger BC has specified that the amount of lines the wordmark can take up is either 3 or 1. Anything other than that breaks the brand guidelines.

Clear Space

Clear space is the specified area around the logo that must be kept free of additional text or other graphic elements. It gives the logo the visual hierarchy it needs, and doesn't allow the branding to be confused or cluttered.

Social Media Icon

Since social media icons predominantly appear very small on the interfaces they are displayed on, it's important to have a mark that communicates on such a small scale. In this case, No Hunger BC utilizes their carrot icon for all their social media branding.

Attributions:

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CHAPTER 31.

TAGLINE

A tagline is usually a short phrase that accompanies a brand's logo or wordmark that sums up or reinforces the intended tone of a brand. It is used as a shorthand way of conveying the most important aspects of a brand to a consumer quickly and effectively. The most compelling taglines are short, to the point, and easy to remember.

> An aspect of No Hunger BC's mission is to provide spaces for communities to start growing their own food. They recognize that this step alone won't drastically reduce the amount of people struggling to put food on the table, but they believe creating these spaces will be valuable for communities to start learning how to grow this food (specifically getting young people interested in gardening), and the food harvested will go towards families who often struggle to put fresh produce on the table.
>
> From that mission, the tagline Feed the Future was developed. It is shown below locked up with the logo:

A brand name and tagline are among the most critical aspects of any marketing mix. They can go a long way to making up for a small budget, and they will work long-term once you've found the right one. An effective tagline tells your target audience who you are and what you do in the most succinct and clear manner possible. It helps to derive your tagline from your USP(s) (Unique Selling Proposition). The USP offers a good starting off point because you've already established what your brand or company uniquely does and will, therefore, help find a suitable tagline. It's important to make the distinction between a tagline and a slogan, The difference being that a tagline will often be a critical part of your companies brand for a greater length of time while a slogan is used more often for shorter running advertising campaigns or initiatives.

A tagline is often one of the first impressions a consumer may have with a brand so it's important that it is well written, convincing, and sincere.

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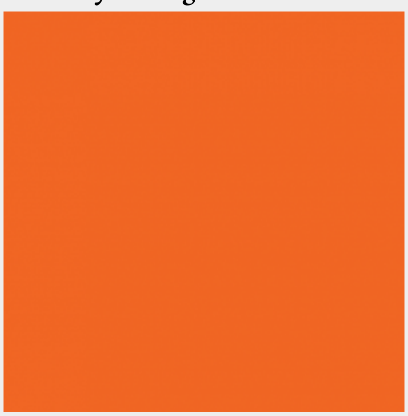
CHAPTER 32.

COLOURS

Listing Brand Colours

A place to list the colours and corresponding codes for your brand or campaign. No Hunger BC uses a specific orange for their mark, so they need to make it very clear what the codes are so that everyone on the team is utilizing the same shade.

Primary Orange



CMYK
1, 74, 99, 0
RGB
241, 101, 34
HEX
#f16522*

Creating a secondary colour palette provides a greater diversity of colour and richness in your design. Choosing colours that are complementary to your primary palette goes a long way towards creating well-rounded collateral.*

Secondary Cream:

CMYK
0, 2, 15, 0
RGB
255, 246, 219
HEX
#fff6db

Secondary Green:

CMYK
80, 27, 93, 12
RGB
57, 129, 69
HEX
#398145*

Using Colour

Colour makes a statement, it conveys personality — but it can also overwhelm users when it dominates the main body of the design. Designers use colour to focus people's attention on the most important content, and a little bit can go a long way. Whites, greys, and blacks may seem visually boring when you have a rainbow of options to choose from, but they provide a neutral basis that allows the colourful elements of your design to stand out.

Highly saturated colours should be used carefully. Saturated colours can suggest liveliness and excitement but can easily go too far and make it painful to look at the layout you've created, particularly if it's meant for web or mobile viewing.

Even people who have spent years studying the subject have a hard time getting colour right. When you're working on a new palette or layout, we recommend that you ask a colour-savvy coworker or friend who is removed from the work to give you feedback. Instead of showing a single design to someone for their opinion, present multiple design directions and have a conversation about the advantages and disadvantages of each. When possible, repeat this process several times, ideally with different critics.*

Colour Connotations

Colours evoke different feelings for people, therefore choosing the right colour for your brand is important. When considering what colour you'd like to use to represent your brand it's important to factor in how people react and view colours. The choice of colour for a brand is critical to how it is viewed by customers or stakeholders. The following list examines what each colour represents and what its best utilized for:

Red

- Qualities: hungry, exciting, urgent, dangerous, sexy, evocative, romantic, design, warm, fast.
- Best for food, clothing, fashion, apparel, cosmetics, sports, real estate, entertainment, health care, caring, emergency services, hospitality, marketing, public relations, advertising.

Green

- Qualities: natural, organic, youth, nurturing, instructional, education, adventurous, ecological, calming, nature.
- Best for: medicine, science, government, recruitment, ecological-business, tourism, human resources

Blue

- Qualities: credibility, calming, clean, focused, medical, professional, judicial, power, business-like.
- Best for medical, scientific, utilities, government, health care, high-tech, recruitment, tradesmen, legal, information technology, dental, corporate

Orange

- Qualities: creative, dynamic, energetic, youthfulness, expressive, child-like, fruitful, innocence, enthusiasm.

- Best for: recruitment, food and drink, entertainment, education, sports, human resources, childcare

Yellow

- Qualities: energy, drive, dynamic, encouraging, design, ideas, youth, invention, bright, positive.
- Best for: childcare, food and drink, entertainment, new technology, automotive, signs and banners, e-commerce.

Purple

- Qualities: spiritual, mysterious, magical, arcane, religious, evocative, sensual, well being, occult, loving.
- Best for: body, mind and soul, astrology, tarot, aromatherapy, massage, yoga, arcane, healing, spiritual, occult.

Brown

- Qualities: earthly, nurturing, historical, safe, financial, tradition, conservative, reliable, retrospect, steady
- Best for construction, animals, mining, veterinary, finance, real estate, ecology.

White

- Qualities: clinical, clean, medical, clear, purity, spacious, simple, easy, fresh.
- Best for medical, science, high-tech, dental

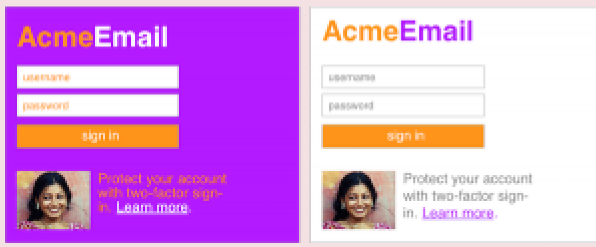
Tips for Using Colour

Use colour as an accent

Colour is great for logos and accents — it makes a statement, it conveys personality — but it can also overwhelm users when it dominates the main body of the interface. Designers use colour to focus people's attention on the most important content, and a little bit can go a long way. Whites, grays, and blacks may seem visually boring when you have a rainbow of options to choose from, but they provide a neutral basis that allows the colourful elements of your UI to stand out.

Examples

Newsletters and other information-heavy designs are particularly well-served by light backgrounds. When choosing a colour for a graphic element, don't just select an attractive hue; first, examine the importance of the information it conveys and whether it deserves to be highlighted.



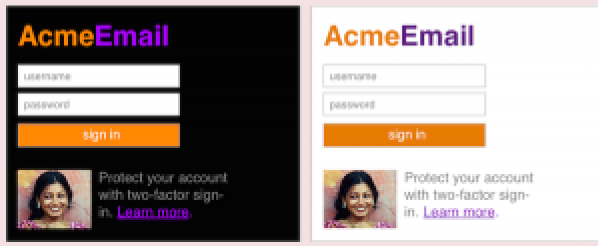
A white background and gray text in the text fields make the sign-in flow to the right more approachable and professional. This colour combination also helps the actionable elements – the button and the "Learn more" link – stand out more.

Neither too bright nor too dark

In order to present your user with an engaging and warm experience, try to use light, neutral tones as the background for the majority of your interface. Unlike software developers, who may find light text on dark backgrounds easier to read, members of the general public can interpret dark colours as unfriendly — sometimes threatening — which just makes things harder if you're trying to build software that inspires confidence and trust with new users. Avoid using black or dark gray unless you are confident that your target audience will interpret it as a cultural reference (as is the case when you're catering to hackers) or there is a functional reason for a dark background (e.g. when it's a tool for working with colour or when it's optional customization in a text editor).

Some developers working with cryptography have told me that they prefer dark backgrounds because they feel it reflects the consequential nature of using the software. However, the general public tends to associate dark colour palettes with video games and entertainment, so they are likely to perceive your tool as unprofessional, playful, or game-like. If you're concerned that a bright palette would compromise the gravity of your work, using darker shades as accent colours can communicate a more business-like attitude.

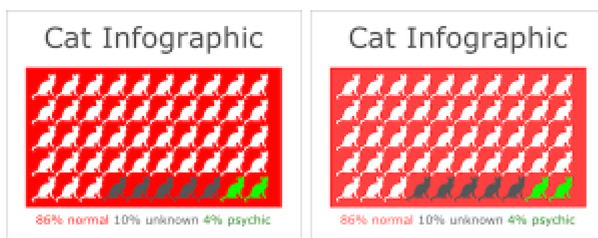
Example



Avoid dark backgrounds as a general rule. If you want to convey a serious feeling, consider using darker shades for your accent colours.

Don't over-saturate

Highly saturated colours should be used carefully. Saturated colours can suggest liveliness and cheer but can easily go too far and make it painful to look at the interface.



If you don't know how saturated a colour is, look at the "S" value on an HSB (hue, saturation, brightness) colour picker in an image-editing program. The more saturated a colour is, the closer its value is to 100. The Simply Secure colour palette is bright and cheerful with a variety of hues but balances this brightness by dampening the saturation.

Think expansively

Privacy-preserving technology is important, and colour can make it approachable to a broad audience. As with many aspects of the software, aiming for simplicity and elegance in colour is usually a safe bet. If you don't know where to start, try finding inspiration from other technologies that are designed to appeal to a broad audience. Otherwise, stick to the basics: use a clean and light background, don't over-saturate and focus on using colour to accent the most important information. This will help you create a design that is approachable, useful, and conveys trust.

Attributions:

This page contains material taken from:

Beckingham, S. (2014, October 20). Is there truth in the psychology of colour or is it simply down to personal taste? Social Media for Learning. https://socialmediaforlearning.com/2014/10/20/is-there-truth-in-the-psychology-of-colour-or-is-it-simply-down-to-personal-taste/

Brody, S. (2016, July 19). Don't Let Color Drown Out Your Message. Simply Secure. https://simplysecure.org/blog/color-message

Color wheel—Color calculator | sessions college. (2018, November 28). https://www.sessions.edu/color-calculator/

O'Connor, Z. (2011). Colour psychology and colour therapy: Caveat emptor. Color Forum, 36(3), 229–234.

The science behind colors and understanding what that does to you. (n.d.). The Logo Company. Retrieved June 9, 2020, from https://thelogocompany.net/logo-color-choices/

CHAPTER 33.

TYPOGRAPHY

Photo by [Alice Donovan Rouse](#) on [Unsplash](#)

Broadly speaking, typography is arranging text in an engaging, interesting, and legible way. Typography, as part of your organization's brand, will be visible in many areas including social media, outreach campaigns, posters, emails, etc. So it's important to consider typography when assembling the putting together the necessary elements of your organization.

Each typeface or font is unique and offers different advantages, therefore it is necessary to categorize them. Sans-serif, serif, slab-serif, and script are just a few of the many sub-genres of typography. When choosing a typeface to represent your organization, not only is it important to consider what a particular typeface says about your brand, but also its availability to use in the formats and mediums that you will require. Furthermore, issues such as legibility, intended audience, and style are all things to keep in mind as they will help dictate your choice of typeface. For simplicity sake, the two main categories of typography, sans-serif and serif are described further below:

In your brand guide you'll want to communicate the typefaces you're using by providing a character set such as the one below for our No Hunger BC example:

DIN 2014 Extra Bold
AaBbCcDdEeFfGgHhIiJjKkLlMmNnOoPpQqRrSsTtUuVvWwXxYyZz0123456789

If the typeface is not commonly included on most computers (meaning you had to source it externally), you'll want to link to the typeface online or provide the text file.

Image by Wiki Commons

Serif Type

Serif typefaces can be categorized as letters with strokes that extend from them, while sans serif typefaces lack these strokes. Serifs are often considered old-fashioned; they look older and are often associated with print media. They are typically known to be easier to read for long-form content such as blogs, books, and newsprint.

Image sourced from [Inkbot Design]

Sans-Serif Type

Sans-serif typefaces are typically modern looking. They're often clean, simple, easy to read on a large scale, and fitting for a lot of modern-day uses. Sans-serif type lacks the strokes seen on serif type instead of relying on simpler forms and geometry.*

Sourcing Typefaces

Although large companies nowadays have the ability to get their own custom typefaces specifically designed for them that is simply not attainable for smaller businesses or nonprofits. Many companies such as Netflix, Airbnb, Apple and Coca Cola have even created their own typefaces in a move to make typography a more considered and unique part of their identity. But if you're looking for free-to-use or open-source typography places such as Google Fonts, Open Font Library, and Adobe Fonts (formerly Typekit) are all good resources for finding the fonts you're looking for. These sites offer access to a vast quantity of fonts that are free or low-cost to use even on the web where often a majority of most brands content will likely live.

It's important to note that typography alone won't dictate how much attention your design garners. Other factors such as colour choice, imagery, and contrast also have a substantial impact on the overall feel and the impact your design will achieve. It's important to consider what your goal is with any project and if the typeface you chose will help you achieve your desired outcomes.*

Fonts

The design doesn't stop at the picture. Fonts have everything to do with your audience's engagement with your communication.

Take a look at this font and decide if it's easy to read:

The quick brown fox jumps over the lazy dog

You can tell what it says; however, reading this font for too long could get taxing, especially on a screen.

Is this next font easier to read?

The quick brown fox jumps over the lazy dog

Your audience won't continue to read your communication if you've chosen a font that's difficult to read.

In addition to legibility, there's a question of style. How do you feel about these lines of text and how they work together?

They're just words, but they're very visual; the use of colour and different fonts draws your attention to the words "dream it" and "do it."

Continued Learning

If you would like to expand your learning on Typography please reference the links below! It gives an overview of common types of fonts, how to use them and how to choose the right font for your brand.

- YouTube Video – Beginning Graphic Design: Typography
- Video Creator's website that contains more information.

Attributions:

This page contains material taken from:

"Business Communication Skills for Managers." Lumen, courses.lumenlearning.com/wm-businesscommunicationmgrs/chapter/visual-design-principles-overview/.

Willis, N. (2018, March 6). Exploring free and open web fonts. Opensource.Com. https://opensource.com/article/18/3/webfonts

Goodwill Community Foundation. (2016). Beginning Graphic Design – Typography [Video]. GCFLearnFree.org. https://www.youtube.com/watch?v=sByzHoiYFX0&feature=youtu.be

CHAPTER 34.

SUPPORTING BRAND ASSETS

Photo by [Nik Shuliahin] on [Unsplash]

Use of Image/Visuals

Images

It may be a cliché to say, "A picture is worth a thousand words," but visual images have power. Good communication is a multisensory experience. Children first learning how to read often gravitate toward books with engaging pictures. As adults, we graduate to denser books without pictures, yet we still visualize ideas to help us understand the text. Advertisers favour visual media—television, magazines, and billboards—because they are the best way to hook an audience. Websites rely on colour, graphics, icons, and a clear system of visual organization to engage Internet surfers. Visuals bring ideas to life for many readers and audiences in multiple ways:"

Brand image is reinforced over time by consistently representing your brand to your customers in an authentic manner. By being consistent across the various channels that reach your customers you can build brand loyalty and enhance brand awareness.

Purpose of Visuals

There are a number of reasons you might consider including visuals in documents, presentations, and other communications. Four reasons are detailed below:

Decorative

Visuals that do not represent objects or actions within the text but are added, instead, for aesthetic effect are considered decorative. Decorative visuals are often added to gain attention or increase the audience's interest. Visuals can be used this way but can detract from the message you are trying to communicate and, thus, should be used with caution.

Representational

These visuals physically represent or physically resemble objects or actions in the text and are relevant to the content of the text. For example, rather than giving a detailed textual description of a new playground, you might include an image or render of the new playground and use the text to highlight specific features or information.

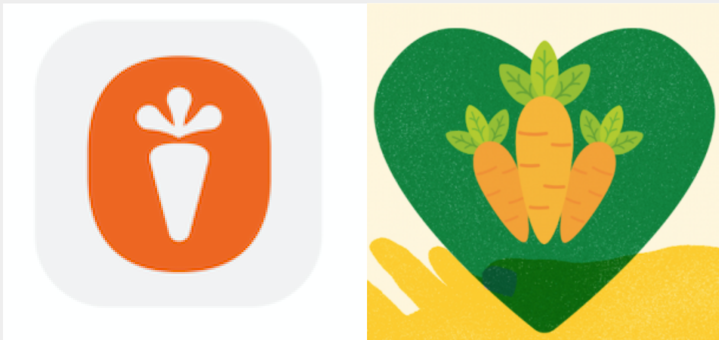
Analogical

Analogical visuals are used to compare and contrast two things, and explain their likeness or correspondence. For example, a marketing consultant might try to clarify the difference between targeted marketing and mass marketing by including images of a single fisherman with a single fishing rod and line next to an image of a bigger boat with a fishing net. By using the fishing analogy, the marketing consultant is attempting to connect a possible prior understanding of the audience, a visual, and the concepts of targeted marketing versus mass marketing.

Organizational

The purpose of organizational images is to provide structure to information, visually define relationships, and illustrate connections. A chart of the hierarchical structure of a company is one example of an organizational image."

> Within your brand guide or style sheet, you may want to include brand images that represent your organization. Such as key stock photos, icons, decorative elements and other graphics to provide a full overview of what you'll need for appropriate brand representation.
>
> For example, for No Hunger BC key branding elements to include would be the following:



Carrot Social Media Icons & Graphic Representation

Sourcing Free Imagery

Listed below are sources for free imagery/photography.

Freerange Stock

Freerange Stock is a completely free stock photo community, supported by advertising revenue and showcasing photographs from talented photographers. Community members can browse the site, download photos for personal and commercial use and sign up to contribute their own work for a share of ad revenue. Create a free account and you can take advantage of their photo tutorials section, browse thousands of royalty-free images and download high-quality photos immediately. Can't find what you're looking for? Email their support team and they'll search for the image in their offline archives!

morgueFile

morgueFile is home to a very user-friendly stock photography database of more than 200,000 images spanning a wide variety of subjects. Anyone can visit the site, browse and instantly download photos and participate in community bulletin boards, all for free. The morgueFile license lets you download and adapt photos for personal or commercial use without attribution, and all contributors to morgueFile agree to this license. Register with morgueFile to upload your own work and take advantage of their Portfolio and Organize features.

freeimages

Sign up for a free account at freeimages and begin browsing more than 350,000 free photos provided by more than 30,000 photographers. These numbers are constantly growing, making SXC one of the leading sites for free stock photography. Community members take part in frequent discussions to tackle site problems and collectively improve the website. Owned by Getty Images, SXC is tied to prominent names in photography and strives to remain ahead of the pack for royalty-free images.

Flickr/Creative Commons

This is where we always start: Arguably one of the most valuable resources for a nonprofit, Flickr: Creative Commons boasts more than 100 million Creative Commons licenced images. These images are divided into different CC licenses (explained here) — we recommend nonprofits use the Attribution, Attribution-NoDerivs or Attribution-ShareAlike license. Once you've picked your images, you can optionally return the favour by adding a Creative Commons license to your own works.

Stockvault

Easily search more than 18,000 high-quality stock photos at Stockvault.net. The website's design is appealing and its image library is easily searchable, bringing you one step closer to finding the perfect photo for your project. No registration is necessary to download these free images and to use their section of helpful Adobe Photoshop tutorials, though creating a free account will unlock special features like organizational lightboxes, photo comments and emailing options.

Illustration/Iconography

- "Illustrations introduce narrative elements to visual content and allow for subtler emotions or more complex situations to be expressed. Including human figures make ideas active and accessible, often in a light-hearted or whimsical way. Illustrations turn away from realism and let you build the world as the brand sees it."
- "Digital design, using vectors, favours clean, bold images which translate well into distinctive branding illustrations. Rather than single-use designs, these online illustrations are being used as part of comprehensive visual systems. Images in an illustration system share a unifying mood or style, which makes them identifiable with the brand's wider image and message, even as they represent different aspects of a product or service."
- "Illustration systems increase the range and depth of messages a company communicates visually about itself, from mission statements to practical product support, while strengthening brand image."

"**Symbols:** Symbols include a range of items that can be either pictographic or abstract. We are surrounded by symbols, but how often do you think about the symbols that communicate with you every day? What symbols can you see right now in your surroundings? Maybe the icons for the apps on your phone are familiar symbols to you. How about the TV remote control, which uses symbols to indicate the function of its buttons. Company logos lead you to identify the brand before you even read any words. Or look at the tags on your clothing; they use symbols to tell you how to wash and dry the garments as intended."

Brand Materials

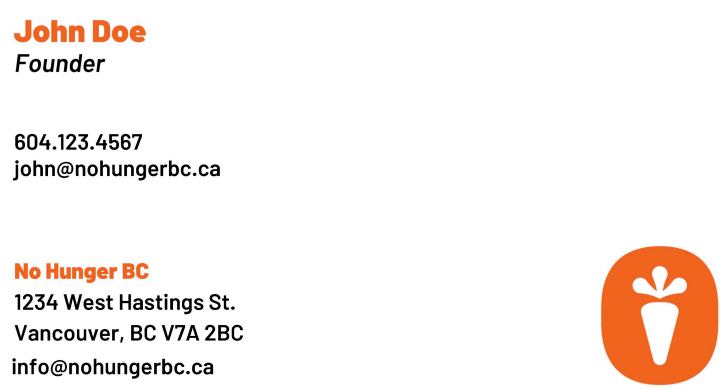
Business Cards

As a not-for-profit, or any, organization, it is important to provide business cards that your employees can give out to people they meet at conferences or other gatherings. Though these aren't used as widely distributed advertising materials, they can still show off your organization's brand and give people enough information on your organization for them to further research.

Front Side

- **Content:** When creating business cards for your organization, it's important to emphasize your logo and brand so that customers will recognize you. Additionally, you can add key information such as your website or charitable registration number.

Back Side



- **Title:** First thing your eyes should go to is the name and title of the business card owner, think of this as a small introduction. Be aware that within an organization, you will need to consider long names for this space.
- **Information:** While the information you present on a business card shouldn't be personal, there should still be a listed email and phone number for the business card owner in addition to general contact information for the organization itself.
- **White Space:** When creating your organization's business cards, be sure to leave room for white space. While this helps the card from looking too cluttered and overwhelming with information, it also allows people to add notes if necessary.

Letterheads

For an organization, a letterhead can be an important tool for advertising your brand. Since it's used to display the organization's professionalism, it can draw in potential customers with the design. Additionally, letterheads often contain important contact information for people to get in contact with your organization easily.


NO HUNGER BC

Dear Jane

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur laoreet nisl mauris, vel scelerisque odio ullamcorper luctus. Integer sit amet maximus urna, eget pulvinar nunc. Proin sit amet commodo magna. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Aenean ornare ligula ut odio pulvinar luctus. Sed laoreet tempor enim vitae viverra. Quisque convallis in eros sagittis lacinia.

Sed iaculis orci vitae justo maximus lobortis. Pellentesque eu erat a nulla facilisis semper faucibus ac risus. Duis congue tempus tortor et consectetur. Sed sit amet sodales ante, bibendum convallis est. Donec vitae mauris in orci pharetra viverra at quis ex. Morbi condimentum erat velit, varius blandit eros auctor vitae. Praesent consequat, neque sed auctor hendrerit, elit quam eleifend tortor, at hendrerit nibh justo eget neque. Donec pharetra nibh ultrices vehicula convallis.

Donec a viverra eros. Proin tempus dui quis nulla consequat sagittis. Sed cursus, est in dictum vestibulum, nibh nulla placerat arcu, sit amet condimentum quam ex eget tortor. Sed et enim sed neque ullamcorper vehicula. Cras molestie interdum erat sed sodales. Integer semper, enim eget consectetur convallis, felis mi elementum dui, bibendum tristique mi libero vitae nibh. In molestie, massa eleifend viverra interdum, leo massa imperdiet dolor, ac pellentesque ligula risus nec eros. Aliquam erat volutpat. Fusce sed massa quis mi tempus interdum.

Donec pulvinar imperdiet eros, non convallis enim. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed placerat risus eu eros feugiat, non bibendum ligula luctus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Curabitur vitae eleifend metus. Sed in nisl eu neque vulputate ullamcorper at pellentesque enim. In hac habitasse platea dictumst. Ut sollicitudin felis non lorem tristique suscipit. Sed placerat, metus nec eleifend congue, nibh augue rhoncus ipsum, ut rutrum ligula sapien vel ligula.

Nullam porttitor nunc non odio scelerisque, ac suscipit ante sagittis. Vestibulum egestas suscipit sapien, ornare eleifend leo vulputate mollis. Nam vehicula ligula a metus vehicula, sed pulvinar nisi fermentum. Nullam in ante eget lectus suscipit faucibus. Vivamus lectus sapien, faucibus a gravida vitae, varius a ipsum. Quisque placerat, nisl at dignissim maximus, turpis nibh laoreet sem, et tristique justo nisi ut leo. Aenean venenatis porttitor purus tincidunt pulvinar. Donec nunc nulla, commodo vitae arcu at, cursus vulputate sem. In hac habitasse platea dictumst. Mauris vehicula sit amet neque ac posuere. Suspendisse vitae massa vel nulla tincidunt blandit. Donec ultrices dolor sed tristique fringilla.

604.123.4567
www.nohungerbc.ca

1234 West Hastings St.
Vancouver, BC V7A 2BC

No Hunger BC
Charitable Reg. 1234567890

- **Header:** When designing your letterhead, it's important to keep your organization's information contained in the header and footer areas to ensure enough room for the document's text. The logo should not be too big so that it's intrusive but still recognizable to people.]
- **Footer:** Your footer information should be legible yet still small enough that it doesn't distract from the document's content.

Attributions:

This page contains material taken from:

Dingwall, J. R., Labrie, C., McLennon, T., & Underwood, L. (n.d.). Using visuals. In Professional

Communications. Retrieved June 17, 2020, from https://ecampusontario.pressbooks.pub/profcommsontario/chapter/using-visuals/

Liu, Y. (2019, December 9). Brand illustration systems: Drawing a strong visual identity. Smashing Magazine. https://www.smashingmagazine.com/2019/12/brand-illustration-systems-visual-identity/

Jordan, K. (2020, June 8)

CHAPTER 35.

STYLE SHEETS & BRANDING GUIDELINES

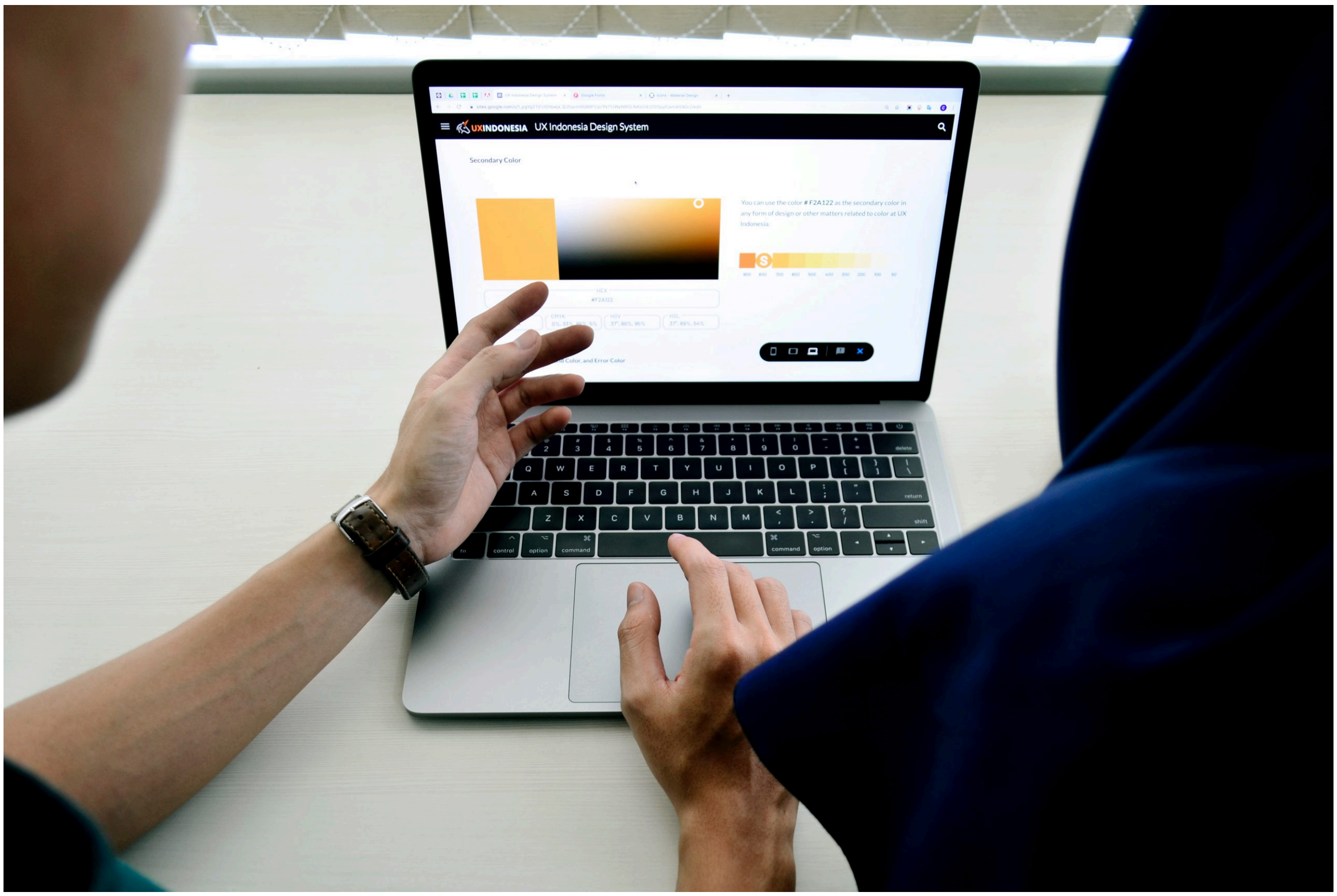


Photo by UX INDONESIA on UNSPLASH

When you make a logo to represent your organization, there needs to be guidelines for how to use it properly so it is not represented wrongly. These guidelines refer to how the logo appears in the sense of color, font, spacing, and orientation.

Throughout the last few chapters, we spoke about the brand vision, logos, colours, and typography. Once all of those are decided it is important to put them all together in a single document to showcase these elements in a form of a **style sheet**. Another name for a style sheet is a brand guideline document.

This is usually in a .pdf format, below are two examples to display what has been covered within the branding section of this book.

Examples of Style Sheets

Below are two examples that are seen throughout this book. Click the links to see them!

- Sample of NO HUNGER BC Style sheet & Branding Guidelines [PDF]
- The Style Sheet used for this IMC Guide online resource.

Attributions

This page contains material taken from:

Create a Style Sheet. (2020). Retrieved 15 July 2020, from https://opentextbc.ca/selfpublishguide/chapter/style-sheet/.

Logo Usage Guidelines | Open Source Initiative. Opensource.org. (2020). Retrieved 13 July 2020, from https://opensource.org/logo-usage-guidelines.

PART IX.

MARKETING

Section Breakdown

Once you've given your organization an identity, this section will help you get your organization out to the public with tools for content creation and curation. There are a number of things to consider before you can start posting to your organization's social media platforms.

The topics that this section will go over include:

- Understanding the elements of a website
- How to market using Social Platforms
- Creating accessible marketing materials to reach everyone
- How to use marketing tools to push and promote your organization
- Tips and Tools for advertising and marketing
- Information on other elements that would be useful to your brand

CHAPTER 36.

WEBSITE

Photo by PIXABAY from PEXELS

An important tool for an NPO is a website. Some brands opt to exclusively live on social media channels, but utilizing a website to set a brand voice, provide more information about your organization, and allow your target audience to engage with you on a deeper level goes a long way towards building credibility. A website should be one of the first platforms you set up. Building a website can seem intimidating if you don't know where to start. This guide will help you set up a beginner site for your cause!

Domain Names

It's recommended that you research domain name availability before deciding on the name for your organization. This ties into the naming exercise in a chapter above, you'll have wanted to choose a name for your cause that hasn't been taken yet! Consider having a backup or alternate way of writing your name, or make it geolocated. For example, No Hunger BC is a common name, but having the location in the name differentiates it and signals to the local target audience.

Domain names cost money, but it's a small investment for a huge impact on your brand and organization.

Here are some good sources for domains, each varies in the price:

- GoDaddy
- Google Domains
- Hover
- SiteGround: WordPress Hosting

Finding a Website Platform

When you sign up with a free website creator, they can provide you with a free domain name too, and that might be your only option (The format of the free Wix site URL is **username.wixsite.com/siteaddress**[1]). But purchasing the site premium will allow you to add your own domain.

After you've established your website name, you'll want to find a creator platform to develop it. There are a variety of free website providers that have an arrangement of tools, though it's almost always recommended that you buy a premium account with them.

WebsiteBuilderExpert shares their 7 Best Free Website Builders in 2023. See the post for an in-depth assessment of these sites.

Here are some more website builders to check out:

- Wix: Best All-Around Website Builder.
- Weebly: Ideal for Small Businesses.
- SITE123: Great Design Assistance.
- WordPress: Perfect for Blogging.
- Strikingly: Made for Simple Websites.
- Jimdo: Small Online Store Builder.
- SimpleSite: Great Mobile Editor.
- IM Creator: Great for White Label Businesses.

1. Wix.com | About Domains

- [Webnode](): Quick and Easy Setup.
- [Mozello](): Create Simple Multilingual Sites.

Be sure once you've selected a platform builder for your site, that you get familiar with their tools and features, as not every platform is laid out the same.

Key Pages for a Website

The next step for your site is to consider what content you want to show on your site and how do you want it organized? For starters, drawing out a basic wireframe of your website will help you get an idea of where you want all the info to go.

1. Homepage

The homepage is your viewers first impression of your site and organization, make use of the space so that it magnifies the key points you want your visitor to know about. This is where you can introduce yourself and your cause, describe your progress and provide opportunities: bring requests for volunteering, donations, and/or sponsorship to the forefront – this is called the "Call to Action" and it's very important on all marketing platforms, this how you want your visitors to engage with your site, how are you trying to get your visitors involved?

2. About Page

An about page is where you tell your story, letting your visitors get to know you and the organization, when and where were you established, what drew you to this cause, what is the emotional attachment that you have to this cause? This is where you could list your past success and historical moments within your organization.

About Us

Founded in 2020, we are a nonprofit organization dedicated to a future with accessible food and clean water. Our story begins with a child who changed our mindset forever.

Read More

Founders: Boiv and Breadna Oldman

3. Your Impact

Make the organization about the your supporters and applaud your community for their efforts, encourage and reinforce their generosity with displaying records of their success and charts on their progress. This could be a signature/money metre, the amount of successful distribution of charitable materials, or number of people saved. Anything that symbolizes success, no matter how small, calls for the attention of the organization to praise these efforts, and this is what reinforces continuous charitable support.

Your Impact

All thanks to the efforts of our fantastic community, we've raised over $50,000 towards providing meals for classrooms, soup kitchens, and those below the poverty line. But we've only just begun!

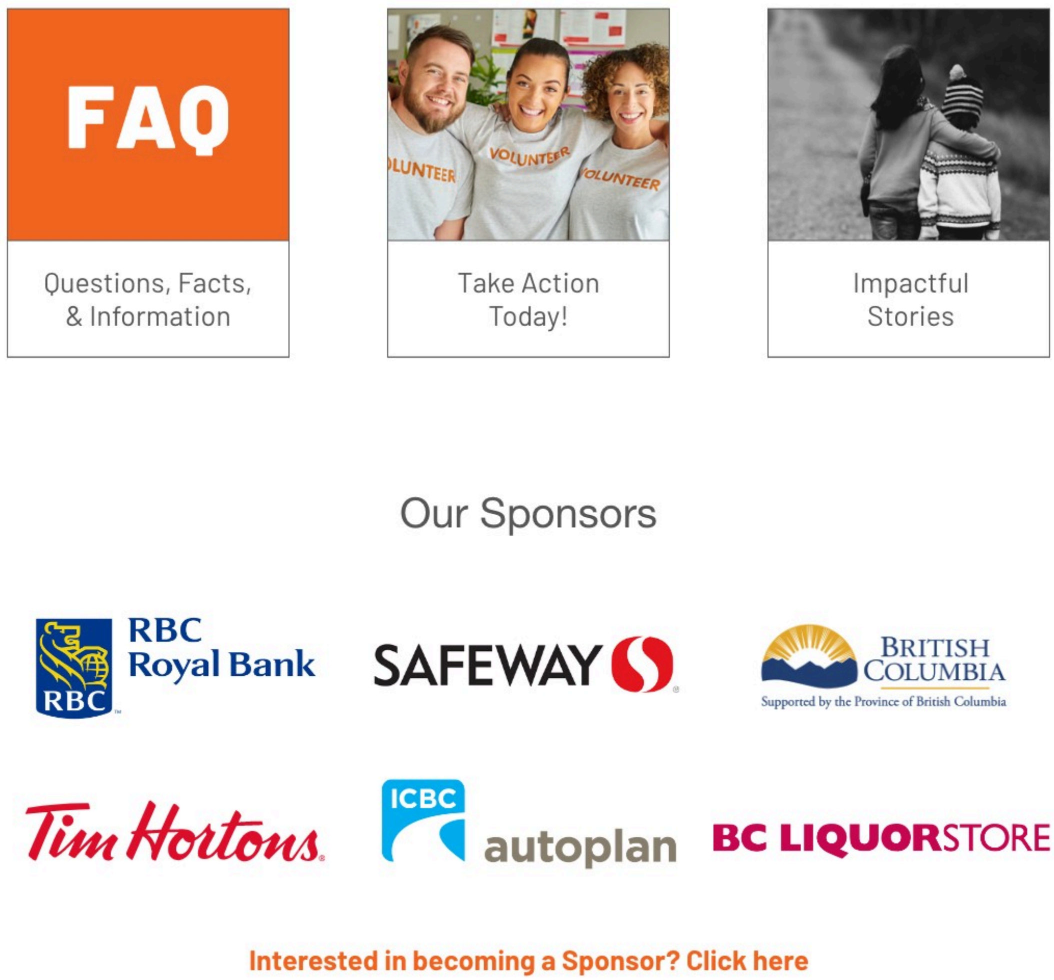
Learn More

4. Resources

Depending on what you're promoting, you will need to educate your visitors on the cause. Provide a page for the cold facts and necessary information about your cause so that others can appropriately share your cause with the proper education on the matter. Having more than one source and external links will benefit the solidarity of your cause.

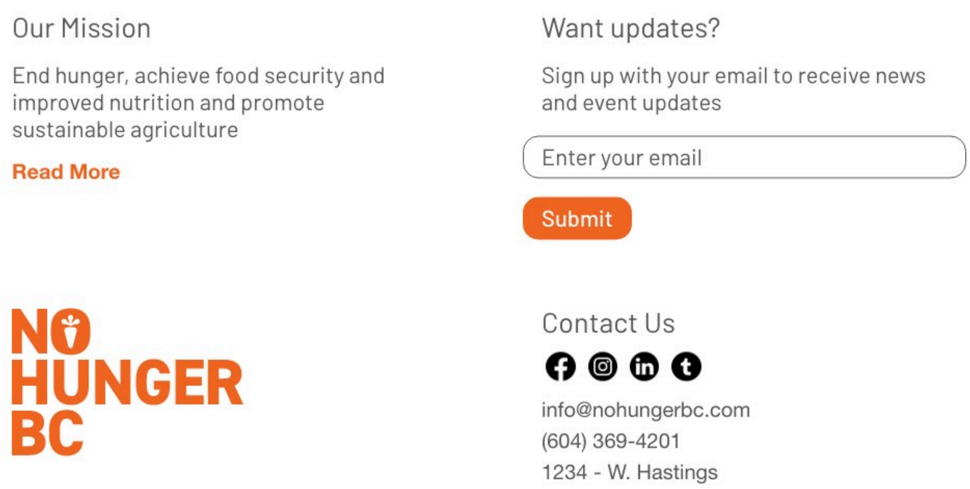
5. Current Activity and Content Feed

Be sure that you have a section that displays what is currently being done by and for your organization. Your audience cares about your engagement just as much as you care for theirs. This can include a feed for your social profiles, articles and blogs, or an active counter for contributions and supporters.



6. Goals and Mission

Describe your intentions, this section is so your viewers have a clear understanding about what your organization stands for. You can list your goals and objectives, and the main mission that drives this cause.



Consider Accessibility

A big factor in marketing to a wide range of audiences is being considerate of any and all differences. A part of inclusivity is considering all forms of inaccessibility.

> *"Solve for one, extend to many"*
>
> — Microsoft | Inclusive Design

This could be a person with a hearing impairment, a senior with partial blindness or someone with mental barriers, the reasons for inaccessibility are circumstantial but can be very prevalent in many commonly known "abled" people's lives. Websites that lack accessibility can be very unaccommodating and can leave those who need it with fewer options in terms of online contribution. You can help normalize their experience when you consider other methods for completing forms or receiving and understanding content when they are able to make an impact for your organization because you made an impact on their experience, you are creating a strong relationship with your supporters from all categories.

Template!

Here is a resource for you!

This is a website wireframe based on the homepage example above, with some pointers about what information needs to be included, this will give you an idea on how you can layout your website:

Wireframe Template [PDF]

Attribution

This page contains material taken from:

(n.d.). Retrieved from https://support.wix.com/en/article/about-domains#:~:text=A domain is made up of:&text=When a Wix site is,your site at any time.

Carney, L. (2020, June 02). 11 Best Free Website Builders: The Definitive List (May 20). Retrieved from https://www.websitebuilderexpert.com/website-builders/best/free/

Microsoft Design. (n.d.). Retrieved from https://www.microsoft.com/design/inclusive/?autoplay=designforinclusivity

Paris, S. (2020, June 7)

CHAPTER 37.

SOCIAL PLATFORMS

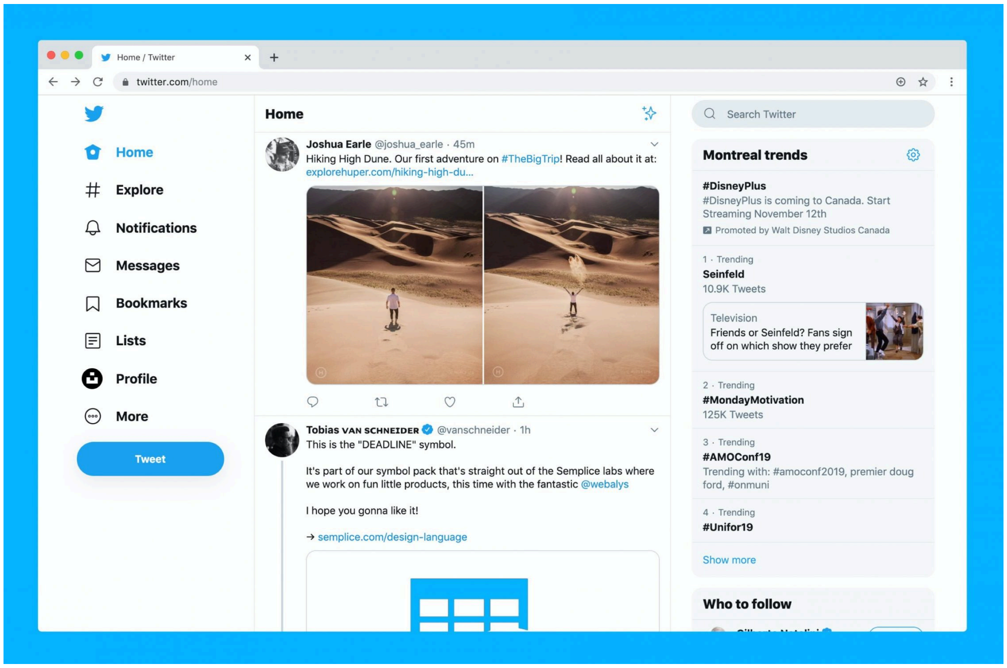


Photo by [LUKE CHESSER](#) on [UNSPLASH](#)

So, you have your identity and a call to action, now it's time for the fun part, setting up your social media profiles! In the next couple of chapters, we'll go through with you the steps for creating a successful social profile with various platforms and how you should maintain them. This is the most affordable way of marketing, it's practically free!

Here are some directions on how to set up your various social media accounts (Facebook, Instagram, Twitter, and LinkedIn) for maximum impact.

Facebook

[Facebook](#) is a leading social platform with major audiences in all demographics, connecting its users to friends and family as well as brands, products, and businesses. Facebook is a must-have for non-profit organizations.

Key elements to a Facebook Profile

Facebook page mockup by Paris Summers

1. Profile Picture

Having a good profile picture is important to the brand. Not only is it one of the first things your visitors are going to see on your profile, but it should also be easily identifiable at a smaller scale, which is where it is most commonly seen. Be sure that your cropping, centring, and resolution are good.

2. Banner

You can use your banner image as a way of displaying current events or important messages.

3. Layout

Facebook has generated templates to optimize your business experience. Within templates and tabs in your settings, choose a template that fits your nonprofit needs, this can also include a donate button for your profile (Hootsuite, 2020).

4. Content

Facebook has advertising options for your organization, but if you're low on funds there are ways of marketing without the need to pay, this includes hashtags and marketing strategies.

5. Information

Be sure to include all your general information like phone number, website/email, and location.

Instagram

Instagram is a creative and engaging platform known for its photo and video-based content. Users can follow other users or hashtags, post content, like and comment, and share to their stories or other social platforms. Instagram is owned by Facebook, which allows for cohesion sharing abilities with various other platforms. Teenagers to Young Adults make up the largest demographic on Instagram (Hootsuite, 2020).

- It's worth having a Facebook profile already made, as this allows you to connect your Facebook to Instagram for an easy profile set up and sharing capabilities.
- Be sure to set up your profile as a business account, this gives you access to Instagram's professional marketing tools:
    - You can add "Nonprofit" to your bio and a Donate button
    - More advanced analytics, like the number of impressions and reach,
    - Display contact information like phone number, website/email, location when applicable
    - Opportunities for Instagram advertising

Below are examples of a nonprofit Instagram account, and the language to use when posting. The graphics used were made for free on Canva:

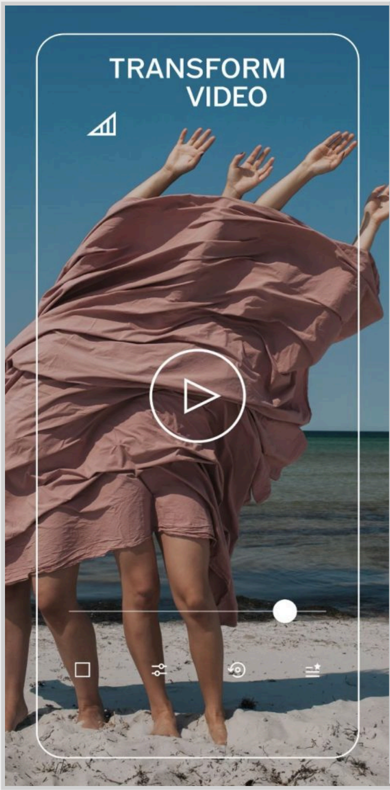
Instagram Profile for No Hunger BC

Instagram Post for No Hunger BC

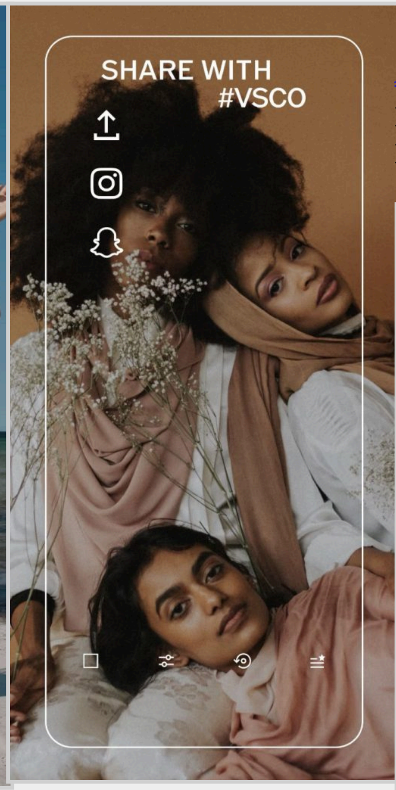
There are numerous apps and websites that can help you create attractive graphics and edit photos.

Take advantage of other photo editing platforms:

VSCO: Photo editor

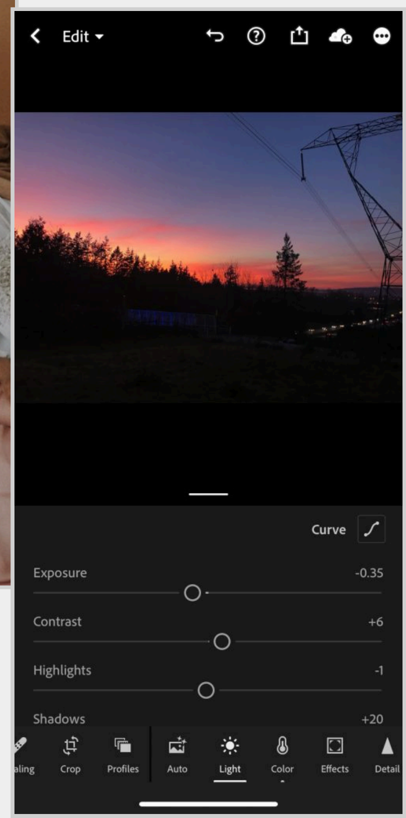


Screencap of VSCO Video



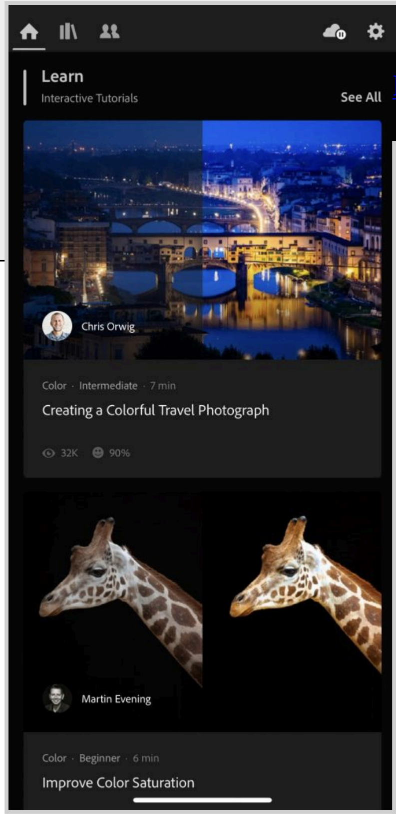
Screencap of VSCO Share

Adobe Lightroom: Advanced photo editor and learning platform

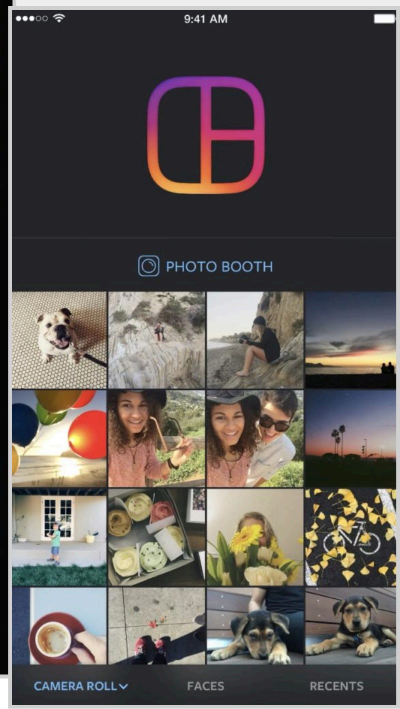


Screencap of Adobe Lightroom's Photo Editor

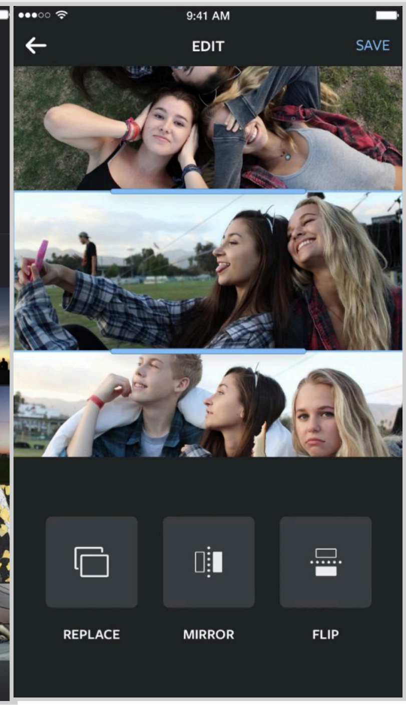
Layout: Collage and frames from Instagram



Screencap of Adobe Lightroom's Learning Platform



Screencap of Instagram's Layout Homescreen



Screencap of Instagram's Layout Features

Twitter

Twitter is a social platform where users can express themselves by writing small messages known as tweets, Twitter is a great source for Nonprofits as it allows for real discussions with other users where you can you promote your mission or cause and engage with your followers.

Here's how your nonprofit can get the most out of Twitter:

Master the basics

There are some basic mechanics you'll need to know about Twitter to help you create tweets that work well on the platform and follow the rules of the website.

- For example, all tweets need to be written within 280 characters, and although you can stack multiple tweets on top of each other for a kind of long-form content post, short and sweet tweets are the most effective.

You'll want to vary your tweets, retweet some respected figures or thought leaders in your space, and add images and links to your posts. If you want to track how many people are clicking on your links, use a site like bit.ly.

Optimize your Twitter bio

Your followers' first impression of you is your account profile, so taking the time to set it up properly and effectively will create a great impact on those who wish to follow your organization

Sarah Turner, a social media marketer at Writinity.com and Researchpapersuk.com, suggests using a high-quality profile picture and a high-quality banner across the top. Try to avoid using generic photos but instead create custom imagery that displays information about your NPO, she adds.

For your bio section on your account page, you have 160 characters, to sum up, what you do and what kind of impact you're trying to make on the world. Try to include one powerful hashtag here to increase your chances of being discovered, but keep it to one or two

Also, make sure all your basic information is filled out, including your location and a link to your website.

Define your nonprofit's Twitter voice

Every organization has its own brand. Given that Twitter is an especially personal platform, you need to work on defining the voice of your brand and how you're going to sound.

- As a profit, you'll want to choose your Twitter voice to resonate with your target markets emotionally. If you're trying to market to young mothers, you'll write a tweet differently than if you were targeting a 50-year-old male donor.

The most important thing to remember is that you need to come across as genuine and authentic. People can tell a mile off if you're being fake and putting on an act. While you want to inject some personality into your tweets to stand out, it can pay to have one person in control of posting your tweets because then it's easy to keep the voice consistent.

Make your tweets engaging

"It's important for people following you to want to interact with your tweets. You want engagement," advises Linda Ferrinho, a nonprofit blogger at Draftbeyond.com and Lastminutewriting.com. "As an NPO, chances are you want your followers to take action on what you're saying, to react emotionally to your message. You want to inspire and educate them."

There are lots of ways to achieve this. Begin by adding a relevant image to your tweet, which boosts your retweet rate by about 35% on average. Note, you can attach up to four photos per tweet, so use these wisely.

You can also attach videos up to 140 seconds in length or attach a GIF either via a link or by using any of the GIFs from the Twitter database. Another handy feature you may want to use is a poll, which is great for getting people involved while hearing about their opinions on your NPO topic.

LinkedIn

LinkedIn is great for making connections in a more corporate environment. It provides a network of business-focused individuals who are seeking connections with organizations, businesses, teams, and employer/employee searching.

LinkedIn can be a useful tool for nonprofits as it can help create connections with sponsors or those seeking to volunteer. And when you've made more of a name for yourself where you begin needing real advisors, LinkedIn will be able to connect you to proper business officials.

External resources

Hootsuite Social Media Classes

Attribution

This page contains material taken from:

Guest. (2020, February 13). How your nonprofit can get the most out of Twitter. Retrieved from https://www.socialbrite.org/2020/02/13/how-nonprofits-can-use-twitter/

Set SMART performance goals. (2018, May 08). Retrieved from http://www.forgov.qld.gov.au/set-smart-performance-goals

Paris, S. (2020, June 08).

CHAPTER 38.

ACCESSIBILITY

“Many organizations are waking up to the fact that embracing accessibility leads to multiple benefits-reducing legal risks, strengthening brand presence, improving customer experience, and colleague productivity.”

— Paul Smyth, Head of Digital Accessibility, Barclays.

When websites and web tools are properly designed and coded, people with disabilities can use them. However, many sites and tools currently are developed with accessibility barriers that make them difficult or impossible for some people to use. Nowadays not all social media content is accessible to people with certain disabilities, which limits the reach and effectiveness of these platforms. Currently, about 20 percent of the population in Canada is estimated to have a disability, therefore, government agencies have an obligation to ensure that their messages, services, and products are as inclusive as possible.

Making the website accessible benefits individuals, businesses, and society. International web standards define what is needed for accessibility.

Photo by PIXABAY ON PEXEL

What is Web Accessibility?

Web accessibility means that websites, tools, and technologies are designed and developed so that people with disabilities and without disabilities can use them. Accessibility emphases providing easily navigate and user-friendly website design to audiences. More specifically, people can

- perceive, understand navigate, and interact with the Web
- contribute to the Web

Web accessibility also benefits people without disabilities, for example

- people using mobile phones, smartwatches, smart TVs, and other devices with small screens, different input modes, etc.
- older people with changing abilities due to ageing
- people with "temporary disabilities" such as a broken arm or lost glasses
- people with "situational limitations" such as in bright sunlight or in an environment where they cannot listen to audio

For a 4-minute video with an introduction to Web Accessibility and W3C Standards, see:

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://kpu.pressbooks.pub/openimc/?p=166#oembed-1

Accessibility is important for Individuals, Businesses, Society

"Designing inclusive software results in improved usability and customer satisfaction."

— Microsoft's App Developer Guide.

The Web is an increasingly important resource in many aspects of life: education, employment, government, commerce, health care, recreation, and more. It is essential that the Web be accessible in order to provide equal access and equal opportunity to people with diverse abilities. Access to information and communications technologies, including the Web, is defined as a basic human right in the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD).

The Web offers the possibility of unprecedented access to information and interaction for many people with disabilities. That is, the accessibility barriers to print, audio, and visual media can be much more easily overcome through web technologies.

Accessibility supports social inclusion for people with disabilities as well as others, such as:

- older people
- people in rural areas
- people in developing countries

Accessibility is good for business as well. The accessible design can improve overall user experience and satisfaction, especially in a variety of situations, across different devices, and for older users. Accessibility can enhance your brand, drive innovation, and extend your market reach. Web accessibility is **required by law** in many situations.

Case Study – Google

A 2016 article in the FastCompany online magazine (Brownlee, 2018), highlights how Google's investment in accessibility provides the company with an innovation edge in a broad array of products and services. Eve Andersson, the lead engineer, featured in the article, says "I'm passionate about accessibility, not just because I believe in a level playing field, but because (it) makes life more livable for everyone." Among the innovations cited as examples are these:

- contrast minimums, required for people with low vision, help all people see in bright light glare situations
- auto-complete, initially provided for people with disabilities, is now widely used by all
- voice control, implemented for users with physical impairments, has been more widely adopted as a great convenience by millions of others
- artificial intelligence advances are based on research originally done to provide visual context to users with visual impairments
- auto-captioning using machine learning has been problematic for the main target population of deaf users and many feel it is still inadequate to meet that need. However, work continues and machine learning itself is steadily improving and has found broader applications due to this effort.

Continued Learning

1. General information on business benefits is in The Business Case for Digital Accessibility.
2. Guidance on figuring out legal requirements is in The Archived Legal and Policy Factors.

Making Your Website Accessible

Many aspects of accessibility are fairly easy to understand and implement. Some accessibility solutions are more complex and take more knowledge to implement. It is most efficient and effective to incorporate accessibility from the very beginning of projects, so you don't need to go back and to re-do work.

- **Complete the alternative text for images**
  - When equivalent alt text is provided, the information is available to people who are blind, as well as to people who turn off images (for example, in areas with expensive or low bandwidth). It's also available to technologies that cannot see images, such as search engines.
- **Keyboard Input**
  - Some people cannot use a mouse, including many older users with limited fine motor control. An accessible website does not rely on the mouse; it makes all functionality available from a keyboard. Then people with disabilities can use assistive technologies that mimic the keyboard, such as speech input.
- **Planning a clear information hierarchy**
  - Develop a simplified hierarchy structure and organize contents into sections to provide a clean and easily navigate website which allows the audience to seek information

easily.

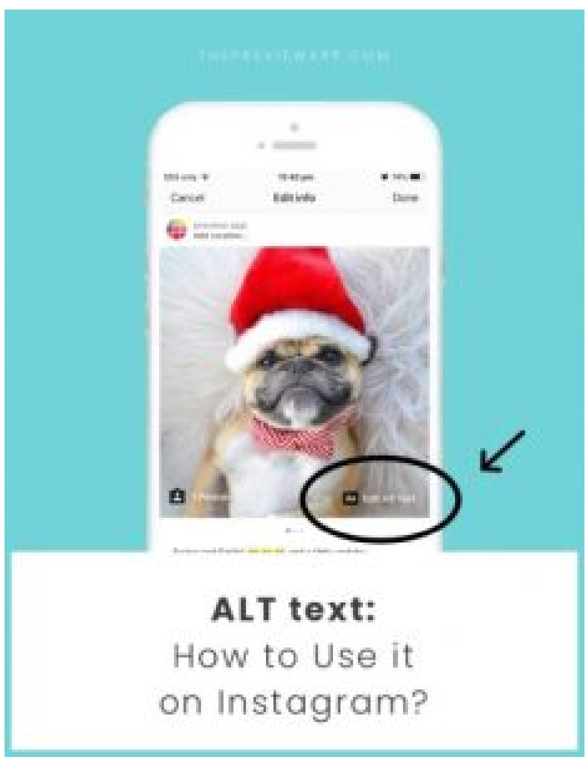
- **Informative Navigation Menu**
    - Design an informative and engaging navigation menu by using concise keywords or icons. Also, ensure that the links between the navigation bar and landing pages are correct so that it can enhance the user experience.

Continued Learning

- For an introduction to accessibility requirements and international standards, see Accessibility Principles.
- To understand some common accessibility barriers from the perspective of testing, see Easy Checks – A First Review of Web Accessibility.
- For some basic considerations on designing, writing, and developing for accessibility, see Tips for Getting Started.

Social Media Accessibility

This article by Siteimprove explains different approaches to digital accessibility and how can companies adhere to accessibility standards in terms of social media platforms such as Instagram, Facebook, Snapchat, Twitter, YouTube, and Vimeo.



To explain the social media accessibility concept further, we have added the example above.

Instagram allows users to have an ALT text function, which provides image recognition for screen readers, allowing visually impaired users to hear the ALT text. Here is a step by step guide oh how to add ALT texts on Instagram posts.

Facebook Accessibility

- Add alt-text to images.
- Add captions to your Facebook videos.
    - Alternatively, load videos to YouTube and add captions there, then link to the video in your posts.
    - Link to transcripts for videos if possible.
- Consult American Foundation for the Blind's Facebook's Accessibility Tips(link is external) to understand how users with disabilities might navigate through your content.
- Check the color contrast in your images if you are conveying textual information.
- Use camel case in your hashtags, e.g., #ThisIsCamelCase. Use hashtags only as needed and at the end of posts.
- Recommend alternatives to Facebook's interface. These alternatives can sometimes provide more accessible experiences for people with disabilities.
    - m.facebook.com (offers a streamlined FB experience)
    - Facely HD on iOS
    - G-Whizz! on Android

Instagram Accessibility

- Add alt-text to images.
- Burn captions into your videos. Instagram does not support the addition of caption files to videos, so you should burn captions into video files using tools like Kapwing(link is external) (paid) or Handbrake (free).
- Check the color contrast in your images if you are conveying textual information.
- Use camel case in your hashtags, e.g., #ThisIsCamelCase. Use hashtags only as needed and at the end of posts.
- Recommend alternatives to Instagram's interface. These alternatives can sometimes provide more accessible experiences for people with disabilities.
    - Facely HD on iOS

YouTube Accessibility

- Warn users of auto-play when posting links to videos hosted on YouTube.
- Caption your videos(link is external). Include a transcript or a link to a transcript where possible.
    - See also Multimedia and our Captioning Instructional Video: YouTube(link is external)

- Use YouTube with a screen reader to understand how the experience might function for a person with a disability.
- Recommend alternatives to YouTube's interface. These alternatives can sometimes provide more accessible experiences for people with disabilities.
  - Accessible YouTube
  - Access YouTube
- Host your videos on YouTube and play in an accessible player on your website.
  - OzPlayer (most accessible option but paid).
  - AblePlayer (less accessible option but free).

Continued learning

Here is a resource for you!

This source offers great examples of real-life stories of people with disabilities that use different features and techniques to browse online. These scenarios highlight the effect of barriers and the broader benefits of accessible websites and web tools.

Check it out!

W3C Web Accessibility Initiative

Attributions:

This page contains material taken from:

Hernan, J. (2019, March 19). How to add ALT text to Instagram posts. Social media examiner. Retrieved from https://www.socialmediaexaminer.com/how-to-add-alt-text-instagram-posts/

National Center on Accessible Educational Materials. (n.d). Creating accessible social media posts. Retrieved from http://aem.cast.org/creating/creating-accessible-social-media.html

"Social Factors in Developing a Web Accessibility Business Case for Your Organization" created by W3C is licensed under CC BY 3.0

Yale University. (n.d). Usability and Web usability. Retrieved from https://usability.yale.edu/web-accessibility/articles/social-media

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CHAPTER 39.

TIPS & TOOLS FOR MARKETING

It's one thing to understand the platforms, it's another to use it properly! This chapter will discuss the different strategies and key practices to assure that you are using your platforms to the fullest.

Photo by Mikael Blomkvist from Pexels

15 Habits to boost Non-Profit Marketing

If you're working on behalf of a nonprofit, foundation, NGO, university or cause organization, you know that you don't move the needle unless you have a marketing plan in place that propels people to take action on your organization's behalf. And today a big part of your marketing toolset involves social media. Because most people participate in at least one social media platform, nonprofits now have an easier and less expensive way to target and reach your stakeholders and constituents. Here are 15 tips you might find useful.

Set Goals

Before you start tweeting or Facebooking away, you need to identify your goals. What are you trying to achieve, and how do you measure success? If you're trying to increase your organization's engagement rate on Instagram, you should first set out a goal using the SMART analysis:

The SMART analysis allows you to break down your goals to be more concise and organized.

- Specific:
- Measurable:
- Achievable:
- Relevant/Realistic:
- Timed:

Once you establish a goal, you should track how you're doing and adjust your processes to improve your results.

Photo by STARTUP STOCK PHOTOS from PEXELS

Know Your Audience

One of the most important steps in boosting your social media presence is knowing your audience. If you know who they are, you would know what their interests are and what type of content you need to share to reel them into your social media pages and your website. You'll be better positioned to effectively engage them if you know what their proclivities are.

Create Targeted Content

By "targeted content," we mean posts that your target audience would find interesting. As the saying goes: content reigns supreme. That holds true with social media marketing as well. Make sure you're not regurgitating boilerplate mission statements — you need to find human stories that represent what your organization is trying to achieve!

Supporters are more likely to engage with your content if it benefits them. Your content must be valuable, useful, and hopefully entertaining to your supporters.

Engage your Audience Regularly

Take time to reply to queries or solicit suggestions posted by the public to your Facebook page or other social media comment sections. Your followers should know that you spend time there and care about what they have to say.

Influencing via Influencers

Influencers are experts and/or public figures who have large social media followings. Wooing them to promote you would help in making your cause, fundraiser, or big event known to a wider audience. Does anyone on your team know any figures with large followings? Ask them!

Be sure that the influencers align with your cause and hold similar values to that of your followers. Do your research on the influencer before getting them involved, your cause would not be taken seriously if you allow just any influencer to come to promote for you.

Join communities

Joining communities that are in the same niche as yours will make it easier for people to find your content, as communities usually allow their members to share posts on community walls. Also, you'll be able to get the latest trends and news in communities.

Put effort into visuals

People are visual animals, which means that more people will likely check out your content if it looks great. So make sure to put more effort into the images you're posting to attract your target audience.

Use hashtags

Using hashtags for your nonprofit is a useful tool for affordable marketing, spreading awareness to new potential followers, and make your content easier to find. This will also help with your branding. [45 hashtags for social change (PDF)](#).

But be realistic and intentional, don't oversaturate your posts with hashtags that aren't relevant to your cause. Be sure that your followers can still interpret what the post is about, leave the hashtags for the end of the post.

Use locations on your posts to draw attention to geologically-specific causes.

Be consistent with content

Post content regularly to build your social media presence. You don't need to devote a full-time staffer to this, but your updates should be regular and not sporadic. Also, make sure your content is consistent with the services you offer so that your audience won't get confused with what your organization is offering. Your social media team members need to be on message with your nonprofit's mission and goals.

Repurpose top content

Yes, recycling or repurposing content is not a bad idea — especially if the content garners a lot of attention the first time you posted it. If a blog or a video gets a lot of attention from one social media platform, you can use it to get more mileage in another platform that is not doing as well.

Create ads that work as content

Facebook Post for No Hunger BC

Maintain your engagement

As long as you stay consistent with your updates, you can increase your social media engagement if you share external posts that your audience might find useful or interesting. In other words, it shouldn't be all about you. Post about your sector or interesting things happening in your world, not just about official organization business.

[Make your posts about your community]

Remember, the reason why people support your nonprofit is that they view you as a partner, an agent of the change they seek. But they want to be the hero!

Create a Social Media Calendar

There are lots of tools on the Internet that will help you manage your social media accounts more easily. This will also help in making sure you post updates on a regular basis.

Photo by [JESSICA LEWIS](#) from [PEXELS](#)

Connect with other marketers

Building relationships with other social media marketers can help foster a virtuous circle. This also makes it easier for you to get more ideas on how you can boost your social media presence.

Measure the results

Constantly check to see if you're on track to achieving your goals. Are your efforts paying off or are they falling short? Only by measuring can you adjust the course to be more in sync with what your audience wants and needs. The number of followers, likes, shares, comments, clicks, and/or leads should be able to tell you if you're achieving your goals or not.

7 Tools to Make Content Creation for Your Nonprofit Easier

Content creation is a critical part of getting exposure and spreading awareness for your nonprofit's message. While content creation may sound challenging with limited staff and resources, it can pay off in a big way if you use the right tools.

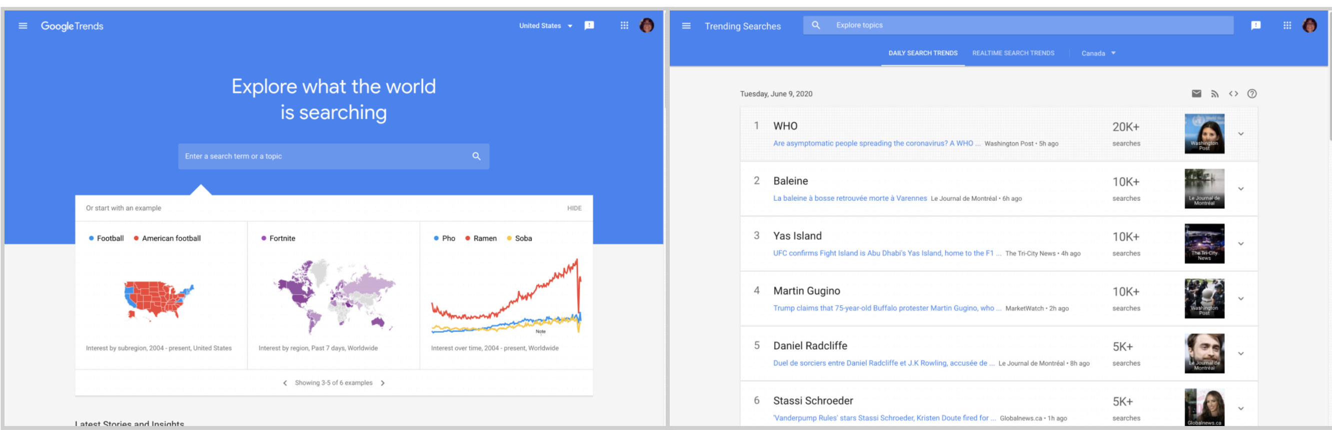
Google Trends

[Google Trends](#) is a tool that helps us find the inspiration we need for writing appealing and interesting content.

Our target audience will want to read about topics they're interested in. This means we need to do some research to see what are the trending and most searched topics or keywords — and how it may tie to your nonprofit's mission. Down below you will find some ideas of what to research.

Things to Research:

- Search for a term or topic
- Analyze the interest for that term by region and period of time
- Find out which sub-regions are interested in the term the most
- Get the data necessary for choosing the perfect topic



Google Trends

This tool will make the brainstorming phase more guided and results-oriented. It helps you arrive at a decision about which topics to focus on and backs it up with evidence and data.

BuzzSumo

Similar to Google Trends, [BuzzSumo](#) is another tool that can help us understand which topics are trending online. It can also help learn what people are searching for the most. You find examples of what analyze down below.

Things to Analyze:

- Explore ideas and get inspired
- Track the current situation within our cause or niche
- Find influencers and see what they're doing
- Analyze popular articles and posts to get insight

Buzzsumo's Homepage

The tool does all the analysis and all that's left is to draw conclusions and apply them to your content. It's a valuable tool that provides the right data for your content or marketing team to draw from.

Canva

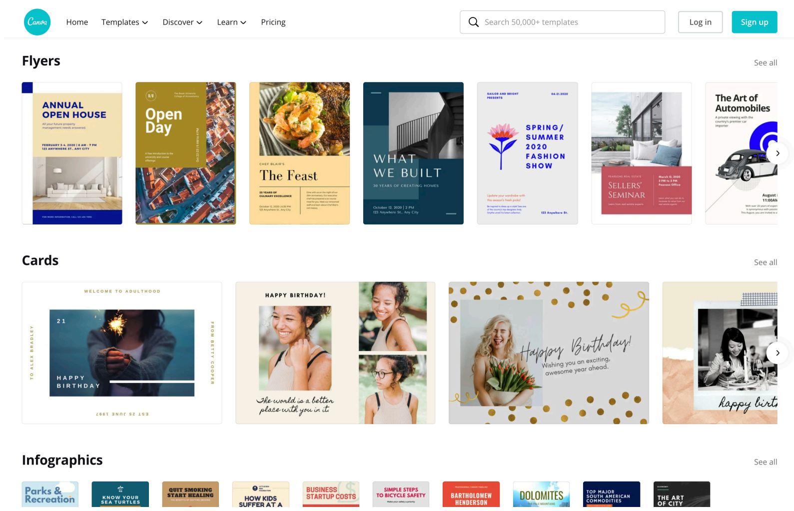
[Canva](), a free graphic design tool.

A visually arresting image can make potential readers stop scrolling and pay attention. This is why it's highly important that you make your content rich in visuals. Below you will find ideas to consider your content. The tool is easy to use. It has endless options and features that are simple to master. So it's a worthy addition to help with executing your content creation strategy.

Canva provides the following:

- Create stunning social media posts

- Create attention-grabbing infographics
- Make your content visually rich
- Add brand identity to your content

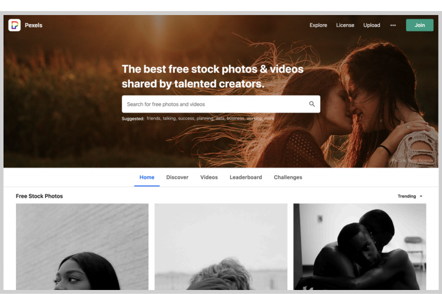


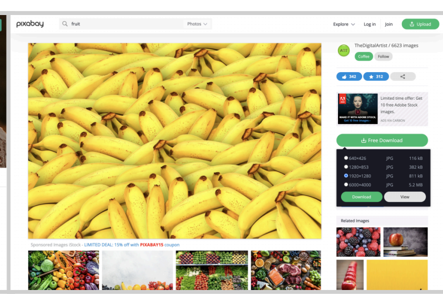
Canva's HomePage

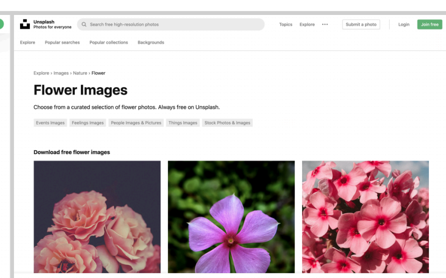
Images

When we think about content rich in visuals and appealing to the eye, we can't imagine it without beautiful images. Not every nonprofit can afford to hire a professional photographer who can create images specifically for its needs. [Canva](), [Pexels](), [Pixabay](), and [Unsplash]() offer a wide range of royalty-free images that you can use

Please refer to an article in the chapter about imagery for more options for royalty-free imagery.







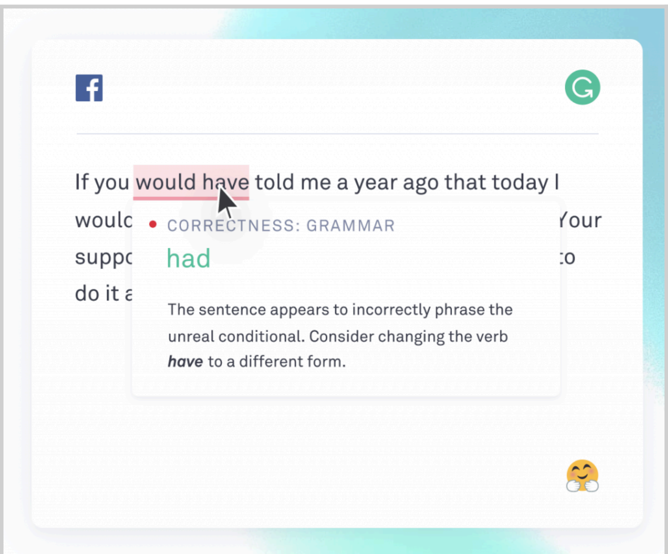
Pexel's Homepage *Pixabay's Download Features* *Unsplash's Search Engine*

Grammarly

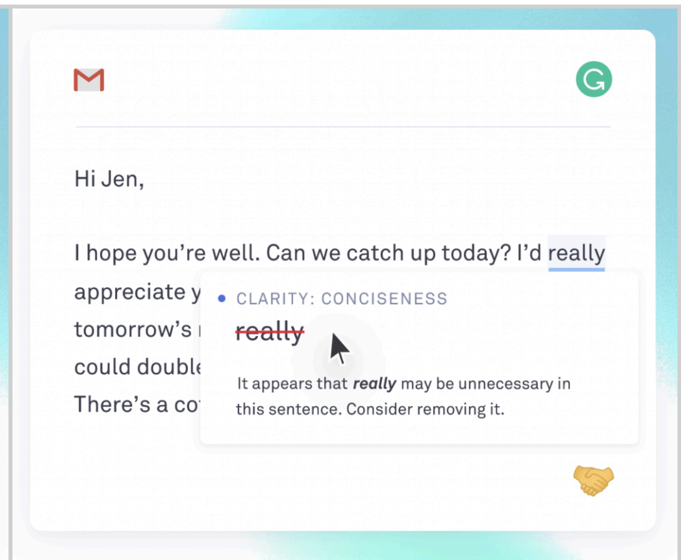
A tool that analyzes and helps you polish your sentences, **[Grammarly]()** should be a part of your team's content workflow. Down below you find examples of what Grammarly does.

Things Grammarly Does:

- Corrects spelling and grammar mistakes
- Suggest sentence structure corrections
- Suggest synonyms
- Gives analysis of the written content



Grammarly's Grammar Correction



Grammarly's Suggestions

Every nonprofit needs content that is impeccable and highly professional. All we have to do is upload the Word document to Grammarly. Then, we correct the mistakes and download the improved version. While the basic version is free, Grammarly Premium costs $19.98 to $29.95 per month.

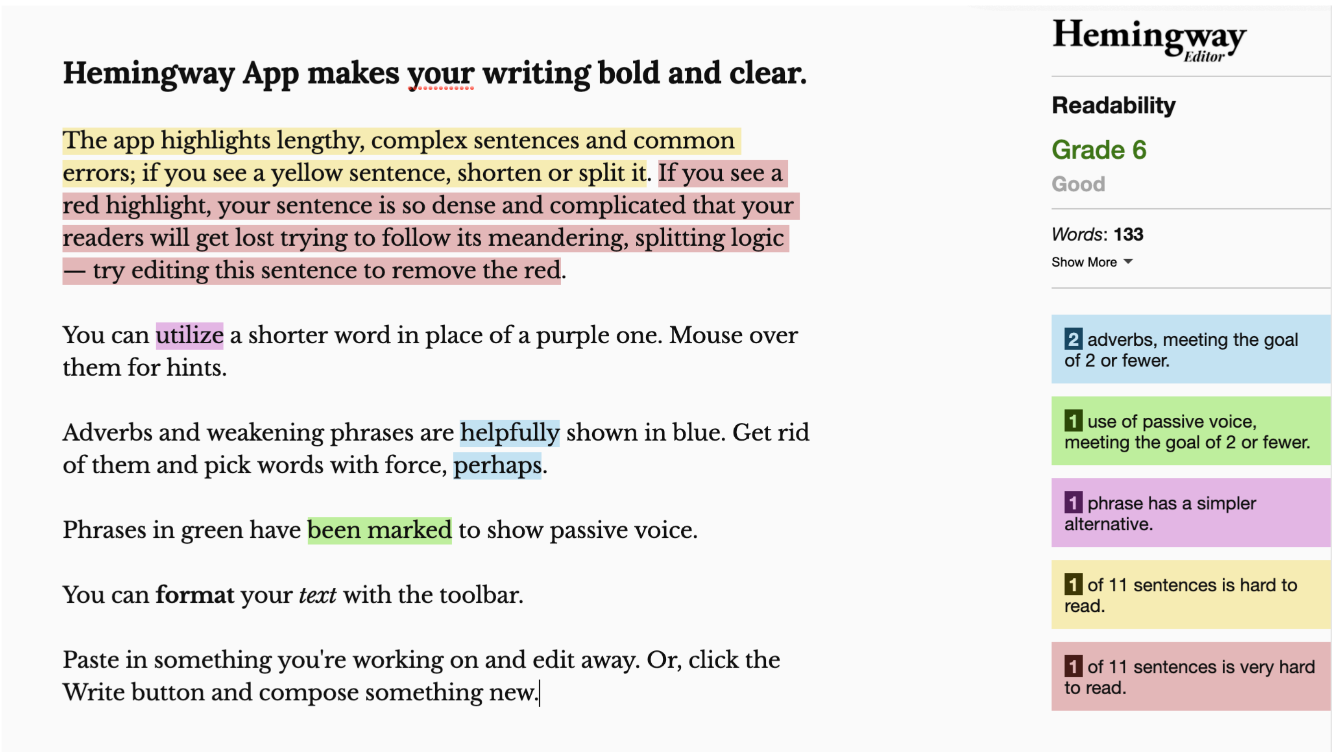
You have other options as well, such as the online service Top Writers Review, which can provide professional help for more demanding tasks.

Hemingway App

Another brilliant tool you might consider to make your content more readable and suitable for your target audience is the **Hemingway** app.

Hemingway lets the users paste the text and then analyzes the following features:

- Readability
- Number of adverbs
- Passive voice usage
- Complicated phrases
- Sentence structure
- Sentences that are hard to read

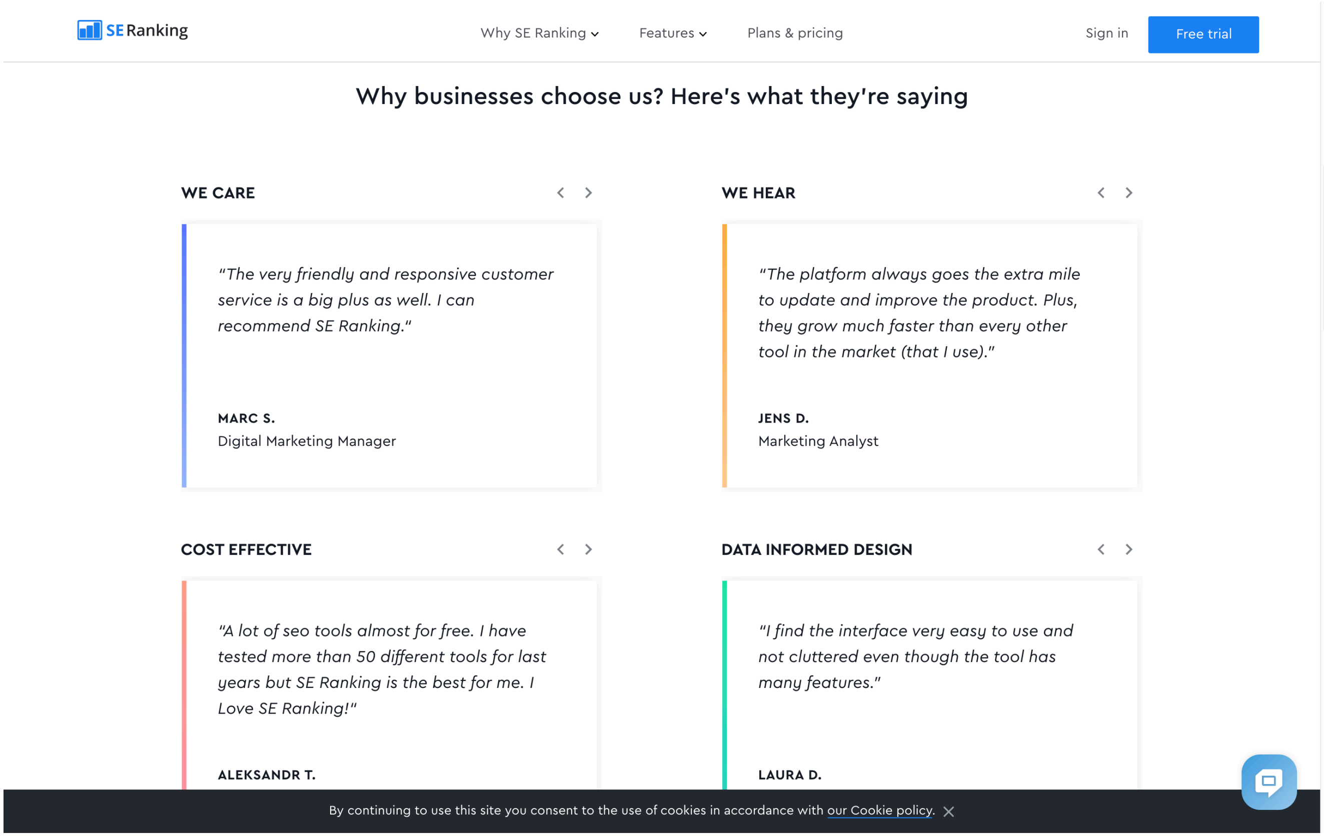


Hemingway Editor's Features

SE Ranking

[SE Ranking] is a tool that can help improve your SEO efforts and make the content more SEO friendly. SEO (search engine optimization) is one of the key elements of any content creation strategy. When writing articles or blog posts, you'll want the content to rank high in Google searches. This will bring more organic traffic and expand the number of people who'll see your post.

By using this tool, you're gaining valuable insights into the terms that help you gain more visibility for your content.



SE Ranking's high ranked reviews

What SE Ranking does:

- Analyzes keywords
- Provides insight into search volume and popularity
- Suggests other similar keywords
- Shows popular keyword ads

External Resources

[45 hashtags for social change (PDF)]

[Make your posts about your community]

Attributions:

This page contains material from:

Guest. (2019, July 29). 15 social media habits to boost your nonprofit's marketing. Retrieved from https://www.socialbrite.org/2019/07/22/social-media-habits-to-boost-nonprofit-marketing/

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Paris, S. (2020, June 08)

CHAPTER 40.

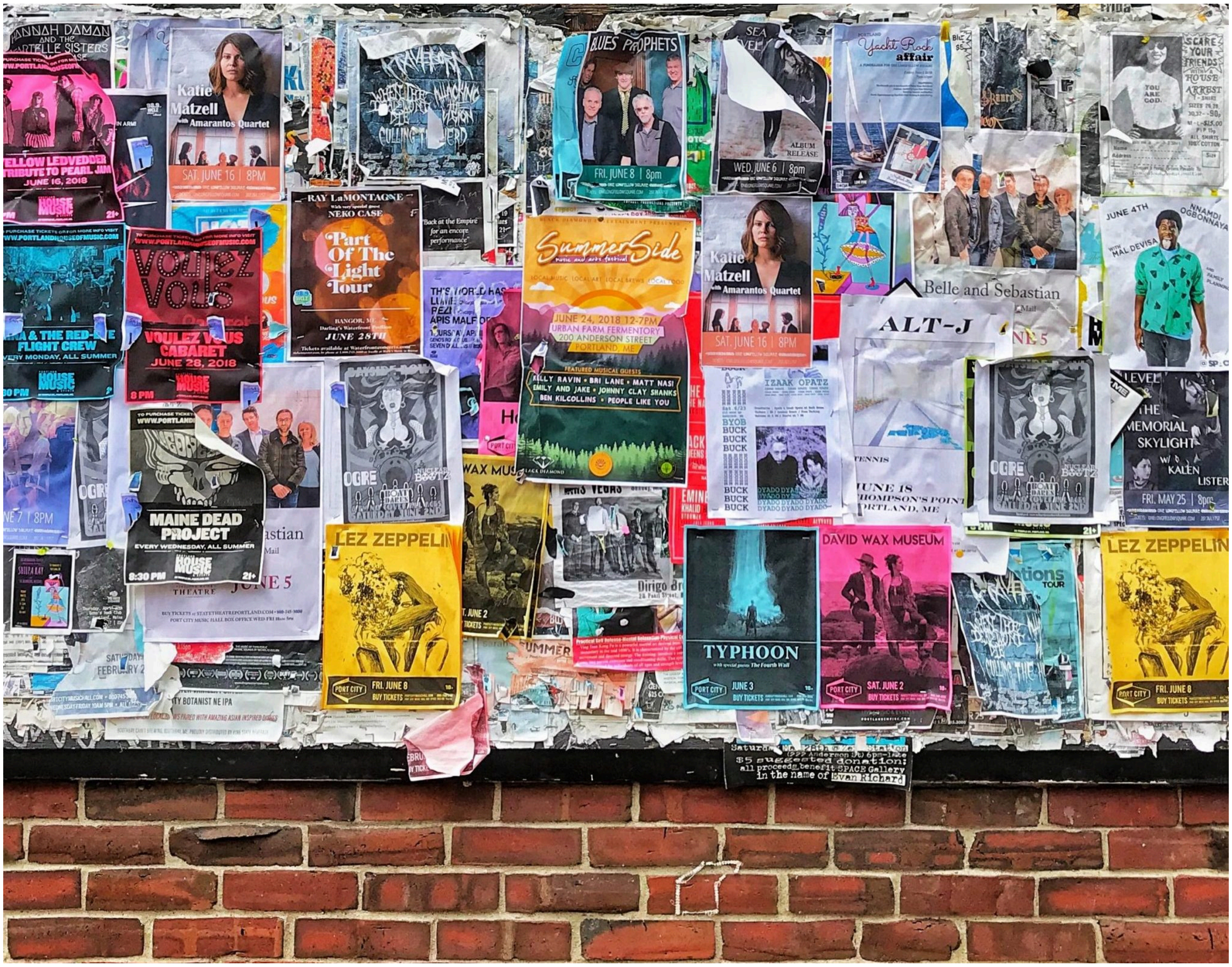
ADVERTISING

Local Advertising on a Budget

When it comes to advertising locally, it can get pricey. Spaces like transit stops, billboards, and publications are effective ways of advertising but they require a subscription, funds that you might not have. Here are some solutions to work around that.

Invest in a Good Printer

Having access to a printer will surely benefit your cause, this allows you to make a lot of resources that you need for your organization within the comfort of your own home. Whether it be for event posters, flyers, brochures, postcards, having a printer will cut the costs of getting those printed at a proper firm in half. Of course, ink and paper can be costly so be sure to research multiple shopping resources before buying your materials. You can find more affordable, quality paper and ink on Amazon over purchasing on the printer's site.



Take advantage of event boards

Shops and cafes around town will have cork boards for locals to put up requests, events, and/or business cards. Be sure to ask for permission before putting anything up, this also gives you the opportunity to educate them about your cause so that if others ask about the goings-on in town, they can direct them to your event.

Places that would be happy to stay informed and put up events:

- Hotels
- Cafes
- Grocery Stores
- Community Centres

Word of Mouth

In addition to the point above, going around town and informing the shops of the events happening around them will initiate action. Whether they're informing their customers, staff, or friends and family, word will travel fast. You can also take to the streets, wearing proper identification of your cause, you could go around and talk with passersby about the cause or an event. But be considerate, not everyone wants to spend the time learning about your cause. Providing flyers or brochures for quick reading can help information travel in an indirect way.

Example Event Poster

Here is an example of an event poster, it should include the following:

1. Hashtags. Hashtags are a great way to draw attention to your event through social media, and using one on a poster encourages people to share your event on their social platforms.
2. Information. Your event poster should have a captivating headline to pull viewers in, this can be achieved with the use of colour, size or by making the text bolder.
3. Graphics. By adding interesting graphics to your poster, it can help draw viewers to your poster as a visual aid.
4. Call to Action. Along with the hashtag, there should be a proper call to action, it could be a website URL or a social tag, @nohungerbc.

Email Marketing: How to Write the Best Fundraising Emails[1]

For most nonprofits, the best ways to raise money online is with a fundraising email strategy. Email is the most effective way to send qualified prospects to your donation page. Email subscribers, by definition, have given you permission to tell them about your cause. Many times, they are waiting to be asked. But let's face it, writing effective fundraising emails is not easy. But it can be done if you follow a process to develop your own email messages. Here are eight steps you can follow to write or even rewrite fundraising emails for your next campaign:

Start with an eye-catching banner

Think of an email as a virtual letter, letters from companies often have a branded banner for their letterheads. With email, it's similar to that except that you can use the header as more of a marketing tool. Banners can be customized to accommodate any event happening within your organization, Canva has free email headers and newsletter templates to start with.

Tell a good story

A good story is the foundation of any effective fundraising appeal. Begin your fundraising appeal with a story that pulls at the reader's heartstrings. Talk about a real person who benefited from your work. Make the donor the hero, not your organization.

Include imagery! Your readers will connect with the email so much more if they can visually see what you're fighting for and the impact they will have.

Make it about them

View your fundraising email as a unique opportunity to develop a relationship with someone who wants to receive your emails, and is possibly open to making a donation. Start by imagining a specific supporter that you've met a few times. Write your email as if you're writing a personal appeal to this person. Tell them why their support is invaluable. Connect their support to the outcome. Use their first name, and write the email in second-person narrative, use terms that are directed at the reader, like "you" instead of "I" or "we."

1. https://www.socialbrite.org/2019/03/25/how-to-write-your-best-fundraising-emails/

Talk about the money

Gain the trust of potential donors by being transparent about your funding gap (the gap between funds that cover admin costs, and what is needed to pay for specific programs).

> E.g. "Sponsors and grants cover administrative costs, but we need your support to make sure programs like Science Friday continue to reach people like you."

Photo from Socialbrite

This approach communicates transparency and responsibility – making donors feel confident about how their dollars will be spent.

Tell them what their money will do

Tell potential donors exactly how the money will be used, and what outcome will result from their donations. This approach helps donors connect the dots between their donation and the outcome they seek. This gives the donor a sense of realistic, personal impact.

Keep it short

No one has time to read a long fundraising email. In fact, most people will just skim it first, then either delete it or keep reading.

Here are four tips for keeping it short:

- Limit paragraphs to 2-3 sentences.
- Limit the overall email to 2-3 paragraphs.
- Break up the text with headlines.
- Enter your email copy into this readability tester.

Ask three times

Don't forget about the call to action! In fact, make sure you ask three times in your fundraising appeal. But don't just repeat the same phrase over and over, ask in different ways.

> E.g. At the beginning of the email, you can say "you can make a difference", linking to your donation page. In the second and third paragraphs, you can ask again: "Join others like yourself to make a difference". Also, try asking once in between two paragraphs, in bold text.

Tell them they can say no

People will often give bigger donations when they feel their personal free will is respected. Giving people the choice of NOT donating almost doubles the likelihood that they will donate!

Don't ask for money in the first email: No one likes to be asked to make a donation if they haven't heard from you in a while. If that's the case with your nonprofit, your first email should encourage your potential donor to learn more about the campaign.

> E.g. charity: water often asks supporters to watch a video or read an article, before asking them to raise money.

Leading off with a powerful story says that you're not all about asking for money, which helps build trust. It also helps you connect with your potential donor on an emotional level – where fundraising happens.

Finish off with a professional signature

Providing an official email signature will help solidify your organization. This also helps to keep your email away from scams, many readers will be looking for credibility in your email, an email signature can help with that. Your email provider will have an option to create an email signature, along with your name, you should include your work position (if you're unsure as to what job title you have in a nonprofit, thebalancecareers.com offers these as possible name ideas: Nonprofit Job Titles), contact information, an actual signature (for legitimacy), social outlets, as well as the logo of your organization.

NoHungerBC Email signature

No Hunger BC Email Signature

External Resources

- Readability Tester
- Nonprofit Job Title

Attributions:

This page contains material from:

Haydon, J. (2019, July 21). How to write your best fundraising emails. Retrieved from https://www.socialbrite.org/2019/03/25/how-to-write-your-best-fundraising-emails/

Jordan, K. (2020, June 10).

Paris, S. (2020, June 8).

CHAPTER 41.

MERCH & SWAG

Where Can You Make NP Merchandise to Reinforce Your Cause?

Being a not-for-profit organization can make it difficult to secure funds for the little things that make campaigns successful, like providing refreshments or swag at events. As shallow as it may sound, your supporters are more willing to give if they get something in return. Providing them with an identification that they participated both benefits the supporter as well as your organization.

Photo by TIM MARSHALL ON UNSPLASH

Giving your supporters swag with your organization on it brings in the possibility of getting new supporters. Your merch is essentially an advertisement by anyone who wears it, which is beneficial for you as a nonprofit organization, this gives you free and intimate marketing as these people will likely spread their support to your cause by word of mouth.

"Purchasing a t-shirt and other branded merchandise is a great way for your supporters to give and connect with your cause. Show appreciation for donors, employees, volunteers, collaborators and more while building your brand and creating more exposure for your cause!"

— Underground Printing

Companies to consider when you're looking to give away or sell swag

Threadless.com/ArtistShops

Threadless.com/ArtistShops is a product print and e-commerce store that offers free products to nonprofit organizations, this means that you don't have to spend anything to get the products printed and sold on their site. If you are looking to sell products for your cause, this is a great site to use

"Artist Shops provides the best and easiest platform for nonprofits & charities to support their cause with a free customized online store."

PrintedShirts

PrintedShirts not only has merchandise for your cause to sell but can provide gear needed for events and campaigns. Though this company would be looking for an invoice, as the saying goes "you got to spend money to make money," they provide an all-round package to nonprofits for all their campaigning needs:

PrintedShirts offers these features:

Attention to Detail: Rest assured knowing that we do events like yours ALL the time. We will do it correctly and we will do it ON TIME!

Annual Events: That's what we do! We'll take care of ALL of the details. The last thing you should be doing is worrying about t-shirts!

Fundraising: We can help you brainstorm for something that fits the event AND your budget. We know that price is important. Talk to us. We'll work with you.

One-Stop Shopping: We're SO much more than just t-shirts! Get it all done here, including all of your Promotional Items.

UndergroundPrinting

UndergroundPrinting provides custom gear for your nonprofit. With easy to use templates and free help from their team of artists, they make creating custom gear a breeze. Choose from their extensive catalogue with options for every budget, including premium brands like Nike, Alternative Apparel, and Champion.

As an example, here are No Hunger BC's mock shirts for SWAG wear and Volunteering shirts:

No Hunger BC's Volunteer Shirt

No Hunger BC's SWAG Shirt

Attributions:

This page contains material taken from:

Custom T-Shirts & Gear for Non-Profit Organizations. (n.d.). Retrieved from https://undergroundshirts.com/pages/non-profit-t-shirts

Non-Profit Groups – Our Specialty! (n.d.). Retrieved from https://www.printedshirts.ca/non-profit-groups-shirts

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Paris, S. (2020, June 10).

PART X.

INTEGRATED MARKETING PLAN

Section Breakdown

Marketers rely on **integrated marketing communication** (IMC) to effectively launch **successful marketing campaigns**. There's no better place to start than with a well-thought-out IMC plan to meet their marketing goals. This chapter will break down the sections of a comprehensive IMC plan, guiding how to create a plan that fits specific objectives, and includes a sample IMC plan at the end.

The topics that this section will go over include:

- Understand the importance of crafting an IMC plan
- Comprehend the components of a comprehensive IMC plan
- Apply practical tips to be able to build an IMC plan

OBJECTIVES

Photo by Mark Fletcher-Brown

What are the Campaign Objectives?

First off, we must define what a marketing plan is and the purpose of the plan. A marketing plan is a written document that details the necessary actions to achieve one or more marketing objectives. It can be created to expand on an organization's manifest. Marketing plans usually cover between one and five years. A marketing plan may be part of an organization's overhead plan.

Within a marketing plan, organizations will highlight key marketing objectives that must be achieved in order to capture a larger customer group, satisfy customer needs, and identify opportunities to spread brand awareness or reinforce its reputation. A campaign objective is a defined goal that acts as a subordinate to a marketing initiative and provides direction to the team so that they can reach their marketing objectives.

Examples

Marketing Objectives

- To increase the number of participants by 40% in the Black Lives Matter movement by the end of the year.
- To increase donations by 75% by the end of fiscal.

Campaign Objectives

- To attract 1,000 people to march on June 20, 2020, Black Lives Matter movement.
- To increase social media traffic by 75% during a one-week educational workshop.
- To generate at least 30 new brand ambassadors by the end of the month.

In essence, marketing objectives focus on broader achievements and act as a guide to achieve organizational success by outlining a plan for their achievement, a budget to support the plan, and the management of assets and resources to achieve the objectives. Campaign objectives are more granular and focus on the short term or the duration of the marketing campaign that will contribute to the success of its marketing objectives.

Creating a Campaign Objective

So how does an organization set desirable but achievable objectives for its marketing campaigns?

You may have heard of the SMART principle for setting objectives. It stands for Specific, Measurable, Attainable, Realistic, and Time-bound. Let's explain what it means, along with some variations and considerations.

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://kpu.pressbooks.pub/openimc/?p=190#h5p-44

Specific

Create a goal that has a focused and clear path for what you actually need to do.

The key to setting any objective is to make it exact, clear, and specific. Being specific gives you direction. You will know your objective is specific enough if:

- Everyone who's involved knows that it includes them specifically.
- Everyone involved can understand it.
- Your objective is free from slang and jargon.

Examples:

- I will drink water for health benefits
- I will increase my business revenues across all of my stores

Measurable

Is it measurable?

Ensure that you know when the objective has been achieved, and how they are going to track progress. This enables you to track your progress, and ties in with the "specific" component.

Good questions to use are "How will it keep me updated?", and "What will success look like/feel like/sound like?"

Examples:

- I will drink **8** ounces of water **3 times** for health benefits
- I will increase my business revenues by **50%** across all of my stores

Attainable

Is this within your current capabilities and operating process?

Make sure that your goal is within your capabilities and not too far out of reach. For example, if you have not been physically active for a number of years, it would be highly unlikely that you would be able to achieve a goal of running a marathon within the next month.

Highly Unattainable Goals:

- I will drink **800** gallons of water **3 times** for health benefits
- I will increase my business revenues by **10,000%** across all of my stores

Realistic

Can this be achieved with your current resources?

Try to ensure that your goal is something you will be able to continue doing and incorporate as part of your regular routine/lifestyle. For example, if you made a goal to kayak two times each week, but don't have the financial resources to purchase or rent the equipment, no way to transport it, or are not close enough to a body of water in which to partake in kayaking, then this is not going to be feasible.

Time-bound

Is there a time limit for your objectives so that opportunities are not wasted?

Give yourself a target date or deadline in which the goal needs to be met. This will keep you on track and motivated to reach the goal, while also evaluating your progress.

Examples:

- I will drink 8 ounces of water 3 times **per hour** for health benefits
- I will increase my business revenues by 50% across all of my stores by the **end of the year**

To summarize, a useful methodology when setting successful objectives is to make them S.M.A.R.T (specific, measurable, achievable, realistic, and time-bound). These S.M.A.R.T objectives should be aligned with the organization's values and overall goals. When objectives are S.M.A.R.T, it'll set your organization up for success by providing direction, organization, and ensuring the business is always adapting to market changes.

Attribution

This page contains material taken from:

Effective Marketer. (2010, November 29). *Marketing by Objectives*. Retrieved from The Effective Marketer: https://effective-marketer.com/tag/marketing-plan/

Lumen Learning. (n.d.). *Behavior Change and Goal Setting*. Retrieved May 28, 2020, from Lumen Learning: https://courses.lumenlearning.com/suny-monroecc-hed110/chapter/three-levels-of-health-promotiondisease-prevention/

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CHAPTER 43.

STRATEGIES & TACTICS

Photo modified on [Canva](#)

Defining Strategy

A strategy is defined as a plan of action intended to accomplish a specific goal. Strategies within any organization have different levels of marketing in which all should be connected including the strategy for the organization, Marketing strategy, Integrated strategy, and IMC strategy. The strategic management process consists of four steps, which are strategic objectives and analysis, strategic formulation, strategic implementation, and strategic evaluation and control.

The primary idea behind an IMC strategy is to create a seamless experience for consumers across different aspects of the marketing mix. The brand's core image and messaging are reinforced as each marketing communication channel works together as parts of a unified whole.

Tools Used to Implement Strategy

The IMC process generally begins with an IMC plan that describes the different types of marketing, advertising, and sales tools that will be used during campaigns. These are largely promotional tools, which include everything from traditional communication elements and modern communication elements. For example, search engine optimization (SEO) tactics and banner advertisements to webinars, blogs, newspapers, billboards, and magazines are used to inform and persuade consumers.

Marketers must strategically decide on the appropriate combination of traditional and digital communications for their target audience to build a strong brand-consumer relationship. Regardless of the brand's promotional mix, it is important that marketers ensure their messaging is consistent and credible across all communication channels.

Promotional Strategies

Two main strategies that are commonly used in IMC planning include push and pull strategies. A push strategy is used to ensure the consumer is aware of the existence of the product. A pull strategy motivates customers to seek out a product or service. See below for examples.

Pull Strategy Examples

- Advertising strategies i.e. mass media promotion of a product
- Customer relationship management i.e. awareness of new products to existing customers
- Referrals/word-of-mouth
- Sales promotions and discounts

Push Strategy Examples

- Point-of-sale displays that make a product highly visible to consumers
- Participating in trade shows and showrooms to demonstrate a product or service to potential customers
- Retailer incentives to stock and sell products, such as discounted bulk pricing

Beyond Push and Pull Strategies

Going beyond push and pull strategies, engagement strategies can further develop an IMC plan. By creating engagement opportunities focused on making a desired impact in the mind–and behavior–of the customer, marketers can better pinpoint not only a winning strategy for their campaign but also incorporate tactics to execute their desired results. For example, if a marketer has a campaign strategy to focus on interacting with their customer base, then a tactic of leveraging social media or hosting an event will be best suited. If for example, a marketer is looking to educate their audience of the work their organization does then a tactic could be to use advertising and content marketing to their advantage.

The following page will further delve into push and pull strategies while incorporating tactics.

NPO Perspective: Consideration of Marketing Strategy Constraints

A marketing strategy can allow an organization to concentrate its resources on optimal opportunities with the goals of increasing sales and achieving sustainable competitive advantage. Marketing strategies are designed to fill market needs and reach marketing objectives. Also, plans and objectives are generally tested for measurable results.

However, the major goal of a Nonprofit Organization (NPO) is to further its non-financial objectives, and NPOs are not necessarily competing with others. Aside from these financial, quantifiable methods such as donations collected or new donors invested, the veracity of an NPO's ability to measure the success of its marketing plan is limited because their measurements are based on subjective factors. It can be difficult for an organization whose goal is to provide social services or disaster relief to quantify its success.

Defining Tactics

A marketing strategy focuses on strategic planning and capitalizing on new opportunities while exercising the organization's strengths. A marketing tactic is a technique or tool that the organization can utilize to achieve its marketing strategy. Tactical planning is a part of the nonprofit marketing plan. After understanding your goals, key messages, and audience, you can determine your marketing tactics – What channel you are going to use. Examples of NPO tactics including flyers, email marketing, events, and social media.

To develop a better understanding of the key differences between strategies and tactics, two marketing examples will be discussed below – Push vs Pull.

Examples

Push Strategy vs Tactic

When an organization wants to implement a push strategy, it's aiming to place the product, service, or idea in front of the customer and ensure the consumer is aware of its existence. For example, an NPO's **push strategy** could suggest that they are looking at new opportunities to expand their market reach by operating in new distribution channels.

An opportunity would be to spread awareness about a social movement to a different demographic. The **push tactic** could be an NPO handing out flyers and actively engaging in conversation with bypassers at a local park. Although **push tactics** are commonly used by for-profit organizations, nonprofit such as Girl Scouts, activist groups, PTO (Parent Teacher Organization), and PTA's (Parent Teacher Association) frequently implement push tactics to inform the public and fundraise for charity or causes.

Pull Strategy vs Tactic

When an organization wants to implement a pull strategy, it's trying to stimulate demand and motivate people to actively seek out a specific product, service, or idea. It is aimed primarily at the end-users, rather than retailers or other middle players in the value chain. For example, an NPO's **pull strategy** could suggest that they are looking at opportunities to spread its brand awareness to a new market segment.

An opportunity would be to conduct primary and secondary research to develop a better understanding of popular trends, consumer needs, or important social movements. The **pull tactic** could be a mass-media advertising and promotional campaign in partnership with a popular influencer that can help promote the organization's purpose. Alternatively, they could utilize referrals and word-of-mouth recommendations from existing followers to build awareness and demand.

Customers: Segment them differently

Consider TalkingPoints, a nonprofit with a mission to increase student achievement by meaningfully connecting teachers and families through mobile technology. Other companies provide parent engagement tools, but they are largely designed for higher-income customers. Founder Heejae Lim wanted to focus on the needs of low-income families of color. While a for-profit would face investor pressure to pursue the most profitable market segment, TalkingPoints focuses on under-resourced teachers, leading to a product strategy that prioritizes translation in 20 languages and doesn't require a smartphone. TalkingPoints' focus on underserved customers positions the organization to dramatically increase parental engagement in high-needs schools, cultivate a loyal user base, and acquire partners who share these priorities.

Marketing: Forge aligned partnerships

The College Board, the nonprofit that administers the SAT test, faced criticism that admissions tests favored students from wealthier families, who are able to pay for costly prep classes and materials. Given this criticism, the College Board was averse to forging partnerships with for-profits that would exacerbate the situation, despite years of persistent inquiries from test-prep leaders like Kaplan and Princeton Review.

Eventually, the College Board partnered with Khan Academy, the nonprofit committed to providing free, world-class education to anyone, anywhere. Together they launched Official SAT Practice, a set of free, personalized tools that allow any student to prepare for the SAT and college-level courses. Khan Academy's nonprofit mission catalyzed the partnership. Today more than half of SAT test-takers in the United States, across income levels and backgrounds, use Official SAT Practice to prepare for the exam, giving Khan Academy access to students that might otherwise be hard to reach.

In conclusion, an organization must develop a solid foundation for its marketing strategy to ensure the team is guided in the correct direction and has a strong understanding of its target market needs. If the strategy is poorly developed, it doesn't matter how innovative and dynamic the tactic is. The incorrect tactic will target the wrong audience, and result in underwhelming campaign performance and wasted resources.

A marketing strategy is a plan before an organization leverages its resources to convince a consumer to engage with them. In comparison, a marketing tactic can only be effectively implemented when the organization understands which audience to target, increase awareness, and generate demand.

Attribution

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CHAPTER 44.

TARGET AUDIENCE

In the Personas chapter, we discussed personas and the importance of defining your target audience. A marketing plan may include one or more campaigns focused on one or more target segments. Some campaigns may focus on achieving specific goals for a single segment. Other campaigns may focus on a common set of goals using a variety of IMC activities targeting different segments.

> Recall that there are four approaches to segment your market: demographic, geographic, psychographic, and behavioral segmentation. With your defined market and the inclusion of your primary and secondary research done, the next step is to incorporate it throughout the IMC plan.

Personas

Clearly defining the audience for IMC activities is an essential input. This is because different market segments use different types of media, and they may have other distinctive characteristics that impact the effectiveness of a communication method. Your decision about whether what tool to use in an IMC campaign should depend, in part, on what proportion of the target audience you can reach with this tool.

Understanding your target segment(s) and their communication and media habits will make a huge difference in your ability to design IMC plans to reach the people you want to reach. See below for an example of a persona called 'Responsible Rebecca'.

Photo by Mark Cortney Cook from [Unsplash](#)

Sample Persona: Responsible Rebecca

Demographics	Geographics	Psychographics	Behavioral
• 26 years old • Female • Service sector/ white collar • University education • $40,000 average household income • Part of the millennial demographic that represents 27% of the Canadian population overall.	• Rents a one-room apartment near her old university campus in Metro Vancouver • Walking Distance to her job as a Manager of Apple Retail at Pacific Center • Easily located near organic grocery stores, natural health product stores, and vegan restaurants.	• Her favorite activity is participating in outdoor activities, such as hiking, biking, traveling, etc • Sees herself as belonging to the Global Village (the phenomenon that describes a more connected world due in part to the advancement of technology) • Believes the internet helps her connect with other like-minded people • She is ESFJ type of people, extraordinarily caring, social, and popular. She is always eager to help.	• Prefers organic products and grocery stores that offer sustainable, locally- sourced products. • Shops at natural health product stores • Willing to spend more time buying products that align with her progressive values and lifestyle.

Attribution

This page contains material taken from:

Heisz, A., & Richards, E. (2019, April 18). This article in the Economic Insights series examines the economic well-being of millennials by comparing their household balance sheets to those of previous generations of young Canadians. Retrieved from https://www150.statcan.gc.ca/n1/pub/11-626-x/11-626-x2019006-eng.htm

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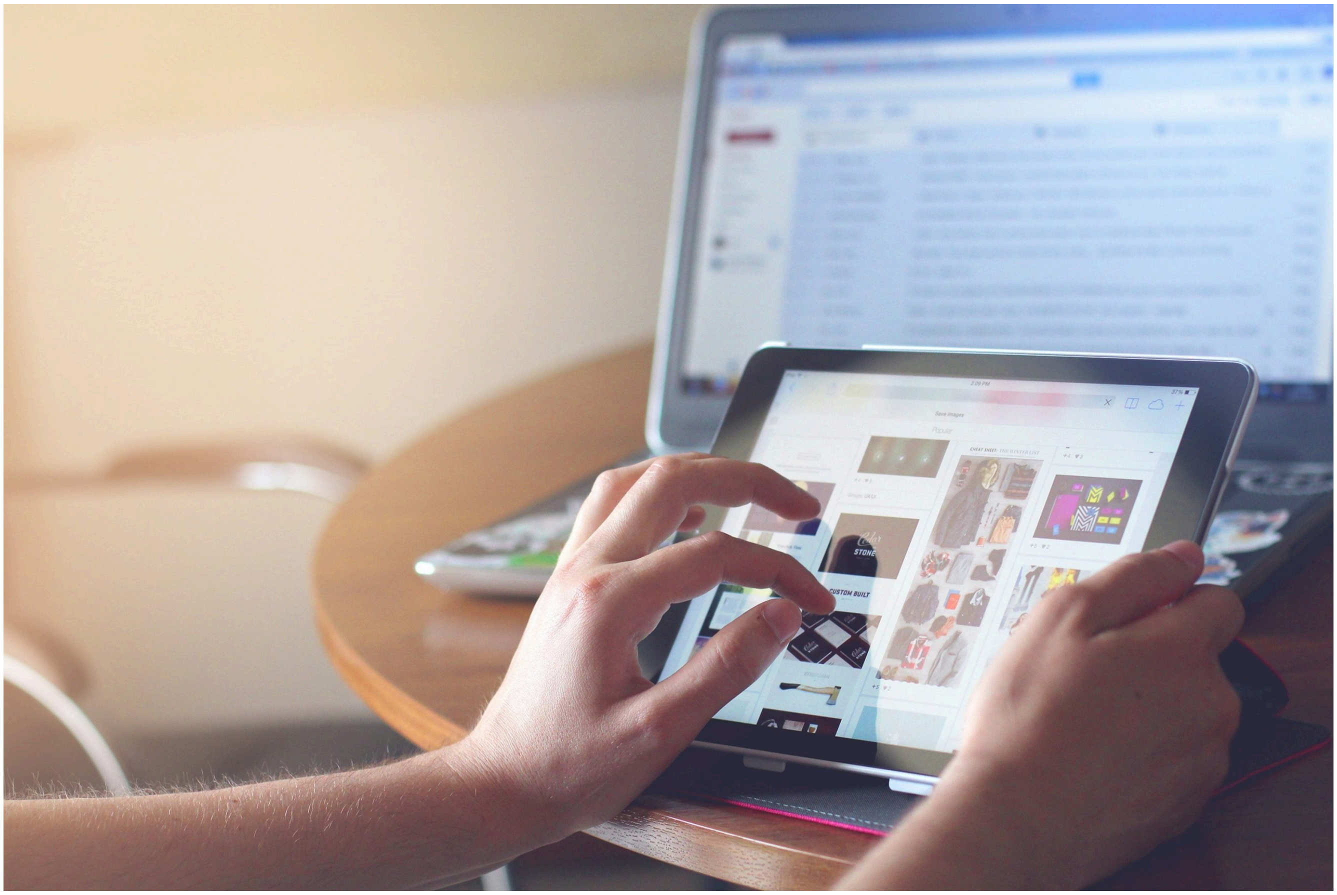
CHAPTER 45.

TOUCHPOINTS



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Brief Look

An IMC Touchpoint describes the point in which a customer is figuratively or literally touched in some way, via human contact, physical or sensory interaction, message or form of communication from an organization. In other words, a touchpoint is a point at which a potential customer or existing customer comes into contact with an organization or brand. Therefore collectively, touchpoints form customer experience.

Importance

It is essential for an organization to think creatively about what they are trying to accomplish through the campaign. Beyond just "pushing" a product through channel partners or "pulling" a customer in through advertising and awareness-building, non-profits should consider how the campaign will draw attention, make an impact, and invite target audiences to take action amidst a crowded marketplace. Exposure by itself is no longer sufficient to create awareness and loyalty; engagement and interaction are vital.

The AIDA Model

Each touchpoint should include a call to action aligned with the campaign strategy and goals. The calls to action should be appropriate to the AIDA model stage, the audience, and the tool being used.

The letters in the AIDA acronym stand for the following

- ***A*** represents ***attention* or *awareness***, the ability to catch the eye of potential supporters and volunteers. It is important to have a good understanding of your target audience and access to good design to increase interest.
- ***I*** is ***interest*** when potential supporters want to further their understanding of your cause and become involved themselves. This can be reached by providing them with opportunities to support your campaigns and having a clear ***call to action***.
- ***D*** represents ***desire.*** Your cause has connected with the supporter in a way that urges them to contribute. This desire is a combination of their sincere interest to provide for the campaign, and the affirmation they will feel for doing good which may or may not be rewarded. Creating equal giving to what you receive can reassure your supporters of their presence within the organization.
- ***A*** is ***action.*** Your audiences pursue your cause, whether it be volunteering or donating, it's important to have the right resources for them to efficiently support your cause. Resources like having a working website, easily accessible communication outlets and an active social presence can reinforce continued support for your campaign.

This system helps guide marketers to refine their objectives and clarify what they want to accomplish with a target segment. As campaign objectives become clearer, marketers gain insight into ways of refining their marketing messages and deciding which tools they can use to deliver these messages effectively.

Communication Methods

Marketers today have many different avenues for creating engagement opportunities focused on making a desired impact in the mind–and behavior–of the audience. An IMC Touchpoint is what's going to create the reaction and call to action.

Advantages of Various Marketing Communication Methods

Different marketing communication methods lend themselves to particular stages of the AIDA model, push vs. pull strategies, and ways of interacting with customers.

- **Advertising** is particularly well-suited to awareness-building but is a costly option.
- **Public relations** activities are often for generating interest, educating prospective supporters and sharing stories that create a desire for the organization. Similarly, experiential events can create memorable opportunities to interact with the cause, organization, and community.
- **Personal selling** typically focused on at later stages of a developed organization, solidifying desire and stimulating action.
- **Sales promotions,** depending on their design, can be focused at any step of the AIDA model. For consumer products, they often focus on point-of-sale touchpoints to induce buying.
- **Direct marketing** can also be focused at any step of the AIDA model, depending on the design. It is often used to generate interest, providing information or an offer that motivates prospective supporters to dig a little deeper and learn more.
- **Digital marketing** offers a plethora of tools that can be deployed at any stage of the AIDA model. Paid digital ads, search optimization, and social media word-of-mouth all support awareness-building and generating interest. Blogs, newsletters, digital case studies, and customer testimonials can be powerful tools for stoking desire. How the website engages customers through the purchasing process is key to persuading prospects to become customers.
- **Guerrilla marketing**, like digital marketing, can be designed to impact any stage of the AIDA model. It is often used by newcomers for awareness-building, to make an impact in a new market. Marketers also use it frequently for engaging experiential activities that solidify desire and create an emotional bond with the consumer.

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Application

Within each of the seven methods listed above to employ a touchpoint, are a diverse number of tools to get your desired awareness. Here are some more examples:

Advertising

- Television
- Radio
- Newspapers
- Magazines
- Display Ads (billboards, posters, flyers etc.)
- Online & Mobile Ads (banner ads, search ads, pay-per-click ads etc.)

Public Relations

- Media Relations
- Influencer/Analyst Relations
- Publications and Thought Leadership
- Events and Fundraisers
- Sponsorships
- Award Programs
- Crisis Management

Sales Promotion

- Coupons
- Sweepstakes or contests

- Premiums
- Rebates
- Samples
- Loyalty programs
- Point-of-purchase displays

Personal Selling

- Sales presentations
- Conversations
- Demonstrations
- Addressing objections
- Field selling
- Retail selling
- Door-to-door selling
- Consultative selling
- Reference selling

Direct Marketing

- Physical mail
- E-mail
- Telemarketing

Digital Marketing

- Content Marketing
- Search Engine Optimization (SEO)
- Search Engine Marketing (SEM)
- Social Media Marketing (SMM)
- Pay-Per-Click Advertising (PPC)
- Affiliate Marketing
- Email Marketing
- Instant Messaging Marketing

Guerilla Marketing

- Graffiti
- Undercover, or stealth marketing
- Stickers
- Flash mobs
- Publicity stunts
- Treasure hunts
- Slam events

Determining the Promotional Mix

Once marketers have selected marketing communications methods, the next step is to decide which specific tools to employ, when, and how much. IMC programs are very powerful when they layer communication channels and methods upon one another—it's an approach that amplifies and reinforces the message. Below is a list of tactics & tools to use for specific campaign strategies:

Campaign Strategy and Tactics

Campaign Strategy	Well-suited IMC Tactics, Tools
Interaction	Social Media, Events and Fundraisers, Guerrilla Marketing Efforts
Engage	Word-of-Mouth Recommendations, Viral Sharing, Social Media
Embrace	Brand Community, Social Media, Events and Fundraisers, Sales Promotions, Viral Sharing
Influence	Public Relations, Thought Leadership Activities, Personal Selling
Convince	Case Studies, Testimonials, Comparisons, Free Trials, Samples/Swag
Educate	Advertising, Thought Leadership Activities, Public Relations, Website, and Other Content Marketing
Inspire	Testimonials, Guerrilla Marketing, Events and Fundraisers, Advertising, Case Studies
Nurture	Email Marketing, Content Marketing, Personal Selling

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Lumen Candela. (2016). Determining IMC Objectives and Approach. Retrieved from Lumen Learning: https://courses.lumenlearning.com/marketing-spring2016/chapter/reading-determining-imc-objectives-and-approach/

CHAPTER 46.

TIMELINE

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Marketing Timeline

A marketing timeline lets you view the chronology of your marketing plan over time, from objectives and strategy to completed action items. Whether you choose a Gantt chart, calendar, or handwritten document, a timeline will serve the purpose of organizing your marketing plan and providing a clear schedule to follow. A timeline also provides a reference for when milestones have been accomplished and any issues that may arise during a project. This can be a useful tool for future planning as you review the success of your marketing timeline.

A timeline is especially important for campaigns because campaigns have a specific start and end date. A timeline keeps the whole team informed and on track to complete tasks on time. It also creates a good visual of the campaign as a whole and how all the elements come together to create a successful campaign.

Benefits of a Timeline

Here are the primary benefits that marketing managers get by understanding and following their timelines:

Better Communication

A timeline enhances communication in the organization. It indicates the various activities to be done, and this means that the staffalways know what they should be doing and at what time.

Better Time Management

A timeline helps NPOs manage their time and tasks well. As mentioned earlier, the schedule shows the tasks to be accomplished against their due time. As such, it helps people to plan for their time well and to perform their activities within the set deadlines. Better time management translates to better performance.

Proper Management of Funds

A correctly implemented business timetable keeps the operating costs under control. When creating the timeline, the planner lists all the estimated costs of the projects to be undertaken. The timeline planner also writes down the actual costs that the business spends on each project, once its timeline elapses. The keen comparison of the estimates and the actual process keeps the business funds under control, thus, prevents unnecessary expenses and inconveniences.

Fewer Mistakes

A reasonable schedule/timeline helps NPOs create a sense of accountability and seriousness. As a result, all parties in the organization become more accurate in doing their duties.

Better Metrics

It's easy to measure the performance of your IMC campaign when you have a reasonable timeline, compared to when you do not have it. This is because the timetable clearly shows you the chronological order of your business tasks, meetings, and any other profitable deals that you have done within a specific period. You can, therefore, use the timeline to know the deals which worked well and the ones which could use some improvement.

Realistic Reminders

Marketing managers handle many activities. Some tasks are more engaging, and they can make the managers to forego or to forget other essential duties. A timeline acts as a constant reminder that you have to finish this specific task and start the next one.

Watch: Planning Your Marketing Timeline

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://kpu.pressbooks.pub/openimc/?p=204#oembed-1

Event Marketing Timeline

Here is what an event marketing timeline may look like:

1. **Pre-event**
    - Pre-event page
    - Social Media Announcement
    - Blog Post
    - Partner Outreach
2. **Event Launch**
    - Launch Email
    - Press Release
    - Blog and Social
    - Partnerships
3. **Day-to-Day**
    - Regular email, social, blogging
    - Thought Leadership & Guest Posts
    - Early Bird Discount
    - Paid Promotion
4. **Last Call**
    - Final Email Blast, Social & Blog
    - Attendee Referrals
    - Phone
    - Influencer Outreach

Resources: Downloadable Templates

- Gantt Chart Template
- Event Marketing Timeline Template

Attribution

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CHAPTER 47.

BUDGET

A large budget can incorporate more expensive marketing communication techniques—such as mass-market advertising and sales promotions—a larger scale, a broader reach, and/or a longer time frame. A small-budget campaign would rely primarily on in-house labor and existing tools, such as a company's Web site and content marketing, email marketing, and social media capabilities. It's important to figure out how to get the biggest impact on the available budget.

Campaign Budget Plan Framework

The first step in developing a campaign budget plan is to start with the total budget available to spend on a campaign. This budget figure works as a guardrail to keep your plans in line with the available resources. Next, think about the promotion mix you envision. Will there be advertising? Digital or direct marketing? Any public relations activities? List the different methods and key tools you plan to use, and then determine how much of your budget you plan to spend on each.

Determining a Budget

Marketing budgets help the planning of actual operations by forcing managers to prioritize activities and consider how conditions might change. Marketing also encourages managers to take steps now, so they can deal with problems before they arise. It also helps coordinate the activities of the organization by compelling managers to examine relationships between their own operation and those of other departments, which is a key component of IMC.

The essential purpose of budgeting is to:

- Control resources
- Communicate plans to various managers from different departments
- Motivate managers to strive to achieve budget goals
- Evaluate the performance of managers
- Provide visibility into the company's performance

Top-Down Budgeting

In top-down budgeting methods in which top management decides the amount the company will spend on promotional activities for the year; Top management sets the overall amount the company will spend on promotional activities for the year. This total amount is then allocated among all of the advertising, PR, and other promotional programs.

Bottom-Up Techniques

Alternatively, some companies begin the budgeting process each year with a "clean slate". They use the bottom-up budgeting method in which a company begins the promotional budgeting process each year, without taking previous years into accounts. This is done by first identifying promotional goals, and allocating enough money to achieve those goals and techniques.

Objective-Task Method

The objective-task method is the most common technique of bottom-up budgeting and usually the best method for non-profit organizations. Companies that use this method first have the objective or task they want the promotion to achieve. Next, they estimate the budget they will need to accomplish that objective or task. Finally, top management reviews and approves the budget recommendation.

Example: Non-profit Campaign Launch Budget

In this example, we will show how a non-profit might launch a campaign or event, and use the objective-task method of budgeting.

Hogan's Alley Society: https://www.hogansalleysociety.org/

Objective: Launch a campaign during Black History month to "promote the historical, cultural, societal, and economic contributions made by Black Settlers and their descendants to Vancouver & BC".

Task: a series of photos, videos, and blog posts to be published daily or every 2-3 days during BHM featuring prominent and lesser-known Black artists, activists, thinkers, and change-makers in BC. Published to Hogan's Alley Society's Blog and amplified over all of their social channels.

Budget:

- Photography: $1000
- Copywriting: $800
- Videography: $12,000

Example: David Suzuki Foundation

Objective: Launch a campaign "to conserve the environment by providing science-based education, advocacy, policy work, and acting as a catalyst for the social change that today's situation demands".

Tasks: Social media posts including photos, videos, and blog posts every 2-3 days involving environmental activists and user-generated content regarding critical issues.

Budget: Photography, Copywriting, Videography.

Attribution

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Advertising Age, September 3, 2007, 4; "Danone Waters Plans to Increase Spend by 15%," *Marketing*, July 25, 2007, 4.

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CHAPTER 48.

METRICS

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Defining Metrics

A critical component of IMC plans is the **key performance indicators** (KPIs) and metrics that will be used to evaluate the effectiveness of the IMC campaign. They are qualitative and quantitative measures of success. An NPO that creates an IMC plan which outlines relevant metrics will allow them to monitor the progress of the campaign's activities easier than one that doesn't.

Importance

Many marketers have realized that they have a better chance of securing their desired marketing budgets if they can point to foreseeable tangible results. Additionally, KPIs and metrics put the purpose of the IMC plan into perspective. They can also add a layer of accountability to the marketers behind the IMC plan since they provide a direct benchmark for them to compare to. Otherwise, how can an organization measure the impact they are making?

Application

Increasingly, the single most important evaluation measure in IMC plans is the **return on the marketing investment** (or marketing ROI). Measuring marketing ROI helps marketers understand if their use of resources is yielding the most effective results. Below is an example of a nonprofit organization that used marketing ROI to assess its IMC campaign.

Example

An NPO is launching a clean water initiative to increase the number of people that can receive potable water in Colombia. The organization tracks the cost of setting up the campaign, which as an online and digital component (promotion costs, costs of the images and designs, and staff time) used to implement the campaign. These components become the NPO's investments into the campaign, totaling $10,000.

Next, the organization tracks a range of metrics, including how many people view online promotions (page views), how many people click to donate (click-throughs), and ultimately the amount of money raise. Thanks to the campaign, the organization sees an additional $100,000 in donations for their clean water initiative.

The marketing ROI can be calculated by taking the donations generated ($100,000) and dividing it by the cost of the marketing budget invested ($10,000). In this case, the marketing ROI for NPO's online campaign is 10%.

Photo by William Iven from [Unsplash]

Metrics can also be utilized to measure other areas of an organization. Other areas to consider metrics for including social media, owned media, earned media, email marketing, paid media, and the online website. These are all other areas a non-profit organization might invest in marketing efforts. Some of these metrics found within these areas can also be utilized in other sections such as impressions, bounce rate, and click-thru rate. It is important to measure these accurately assess the effectiveness of an organization's campaign.

Social Media | Owned Media | Earned Media Metrics

Reach

- **Impressions:** Measures the number of times your content appears on a screen, whether clicked or not. These help to determine how much of your content is being seen. Determining the level of your impressions is important because it can mean how effective or ineffective certain media posts are.
- **Potential Reach:** Amount of people you want your posts to reach to and who have yet to confirm. A target group of people you want to reach with your social media. These include Followers, Fans, Subscribers.
- **Confirmed Reach:** Amount of people who have already seen your post and you have reached out to and can be confirmed. These include views, Post/Page Views, Video Views.
- **Repeat visits:** Measures the percentage of visitors who have returned to your social media

posts within a time frame.

Engagement

- **Likes/Stars/Hearts:** Measuring the number of likes a social media post made by the organization gets. This can be measured from Facebook, Instagram, or Twitter.
- **Followers:** Number of users registered in the business' social pages.
- **Comments:** Measuring the number of comments a social media post made by the organization gets. This can be measured from Facebook, Instagram, or Twitter.
- **Shares:** Measuring the number of shares a social media post made by the organization gets. This can be measured from Facebook, Instagram, or Twitter.
- **Retweets/Reposts:** Measuring the number of retweets and reposts a social media post made by the organization gets. This can be measured from Facebook, Instagram, or Twitter.
- **Positive/Negative Sentiments:** Measuring the tone of voice received from those interacting with the organization. This measures the number of people who are happy with the organization as well as sad/angry/upset with the organization.

Email Marketing Metrics

- **Open rate:** The percentage of the total number of times an email is opened by a subscriber.
- **Bounce rate**: The percentage of the total number of the email that was not delivered successfully.
- **Click-through rate (CTR) :** Number of clicks on a link in the email over impressions.
- **Email subscriptions:** Measure the number of users who ask to receive future emails and updates from an organization.
- **Unsubscribe rate:** Measures the number of users who opted out of their emails from the organization's subscription email list and declined to receive future emails and updates from the organization.

Paid Media Metrics

- **Cost Per Click (CPC):** Measures the average cost for each click on ads, made by the non-for-profit organizations, by users. Can be calculated by taking the total cost for clicks and dividing it by the total number of clicks on your content or ads.
- **Click Thru Rate:** Number of clicks on impressions.
- **Cost Per Impression:** Measures the cost a non-for-profit organization will pay for every 1000 impressions their ads achieve.
- **Customer Acquisition Cost:** The amount it costs for an organization to acquire a customer. In terms of non-for-profit, this could relate because it can calculate how much it costs from a marketing standpoint to gain a subscriber or follower to the organization.

Online Website Metrics

- **Number of Visits or Sessions:** A visit to a website is generally considered ended when the user does not click for more than half an hour.
- **Number of Visitors or Users:** Each user can visit a website more than once; this metric takes into account only unique visitors regardless of how many visits or sessions they have done.
- **Number of visited pages**: Total number of web pages seen in a time-lapse by visitors.
- **Visits Per Page:** How many times a single page has been visited in a time-lapse.
- **Number of Pages Per Visit:** How many pages are seen on average by visitors.
- **Total Sessions/Visit: Cumulative** Sum of all visits to a website. Informs you of the total number of visits whether in a day, week, month, or year.
- **Average Time Per Visit:** Calculated from the entire amount of visits to the website in a time-lapse. Measures the average time a user visits the website.
- **Bounce Rate:** Percentage of visits ended with a single page visited.

Evaluation

By evaluating marketing efforts on a given campaign through KPIs and metrics, marketers can tweak their efforts and allocate resources better. Taking from the example above, the NPO would have had to outline the desired marketing ROI in their IMC plan from the beginning. They could have identified that a marketing ROI of 5% would be considered successful for their campaign. In this case, an evaluation would show that they exceeded their target for marketing ROI.

Utilizing metrics to measure all sections allows a non-profit to gauge their intended target audience better. For example, if one were to create a social media post about the importance of emphasizing on world hunger, they would benefit from knowing how many users it has reached or how often it was shared or commented on. In the case of email marketing, one would want to know how many emails are being opened vs ignored, etc. Ensuring evaluation of metrics within all of these different areas, helps a non-profit organization understand what they are performing well in and what they need to improve upon within their campaign. Using the right metrics to measure these sections is important because it allows the organization to accurately assess the effectiveness of the organization's campaign and the level of influence the organization has achieved over its intended target audience.

The following metrics are broader that can help measure the overall effectiveness of various campaigns:

Cost Per Win

- Measures the expense of each sale. Let's say that a nonprofit's campaign resulted in five new volunteers (wins). With a $1,000 budget, that is $200 per volunteer. This important metric can be used to compare various campaign efforts to each other.

Cost Per Lead

- Measures the cost associated with generating a lead from a campaign. If a nonprofit gained five new volunteers from 10 leads with a $1,000 budget, that is a cost of $100 per lead.

Conversion Rate

- Measures how many conversions are related from a campaign's efforts (similar to the percentage of website visitors who converted into leads or customers). For example, if a campaign brought in 1,000 new email newsletter subscribers, from which the nonprofit organization got 10 volunteers, that is a 1% conversion rate.

Attribution

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CHAPTER 49.

SUMMARY

Key Takeaways

As indicated in the research provided, there are multiple aspects contained within a integrated marketing plan that makes it successful. These components are summarized below:

- The marketing plan would contain clear and smart campaign objectives, indicate which type of strategy it would follow such as either a push or pull strategy and explain the type of tactics needed to implement such strategy.
- The marketing plan would identify a legitimate target audience using a combination of primary and secondary research. It would use this research to develop comprehensive personas that accurately detail a segment of their target audience.
- The marketing plan would address "touchpoints", which indicates a way a potential customer or existing customer comes into contact with an organization or brand and utilize this to form an experience between the organization and its customers. These customers would essentially be considered a non-for-profit organization existing or future members.
- The marketing plan would create a detailed timeline that illustrates an effective scheduling system for the organization. This timeline would improve communication, time management, metrics, proper allocation of funds as well as deliver fewer mistakes and create realistic reminders for the organization.
- The marketing plan would have a framework designed for a campaign budget. This framework would display the total budget available to spend on a campaign and work as a guardrail to keep your plans aligned with the current resources available towards the firm. Enabling the organization to determine their budget, choose a budgeting method and effectively allocate funds to all aspects of the campaign.
- The marketing plan would utilize multiple key performance indicators and metrics to evaluate the effectiveness of the IMC campaign. These metrics would measure different areas of the marketing efforts that a non-for-profit organization would invest in. These areas include social media, owned media, earned media, email marketing, paid media and the organization online website. These metrics would be applied and evaluated over the course of the marketing campaign in order to accurately assess the effectiveness of it and the level of influence the organization has achieved over their intended target audience.

An organization that contains all of these components of an Integrated Marketing plan would be considered to be successful and on the right track towards leading a strong campaign for their organization.

PART XI.

IN-HOUSE VS OUTSOURCE

Section Breakdown

If the IMC campaign and plan require resources that an NPO may not have internally, they may consider outsourcing portions of their work. For example, if an NPO is planning a press conference, hosting an event or launching a new business or marketing campaign, it may make sense to outsource resources from a PR agency as it may be outside their areas of expertise. This way, an agency can bring knowledge and expertise that an NPO might otherwise not have and thus help them accomplish their goals. This section will outline the key steps involved in deciding between in-house vs outsourced and aid an organization to:

The topics that this section will go over include:

- Understand the difference between **in-house** vs **outsourced** operations and the pros and cons each one will provide the organization
- Succeed with in-house operations by being able to establish a goal, realistic timeline and adequate budget for the expenditure
- Connect and maintain positive outsourced relationships
- Utilize a decision matrix to help you achieve a successful campaign

CHAPTER 50.

DEFINING IN-HOUSE VS OUTSOURCING

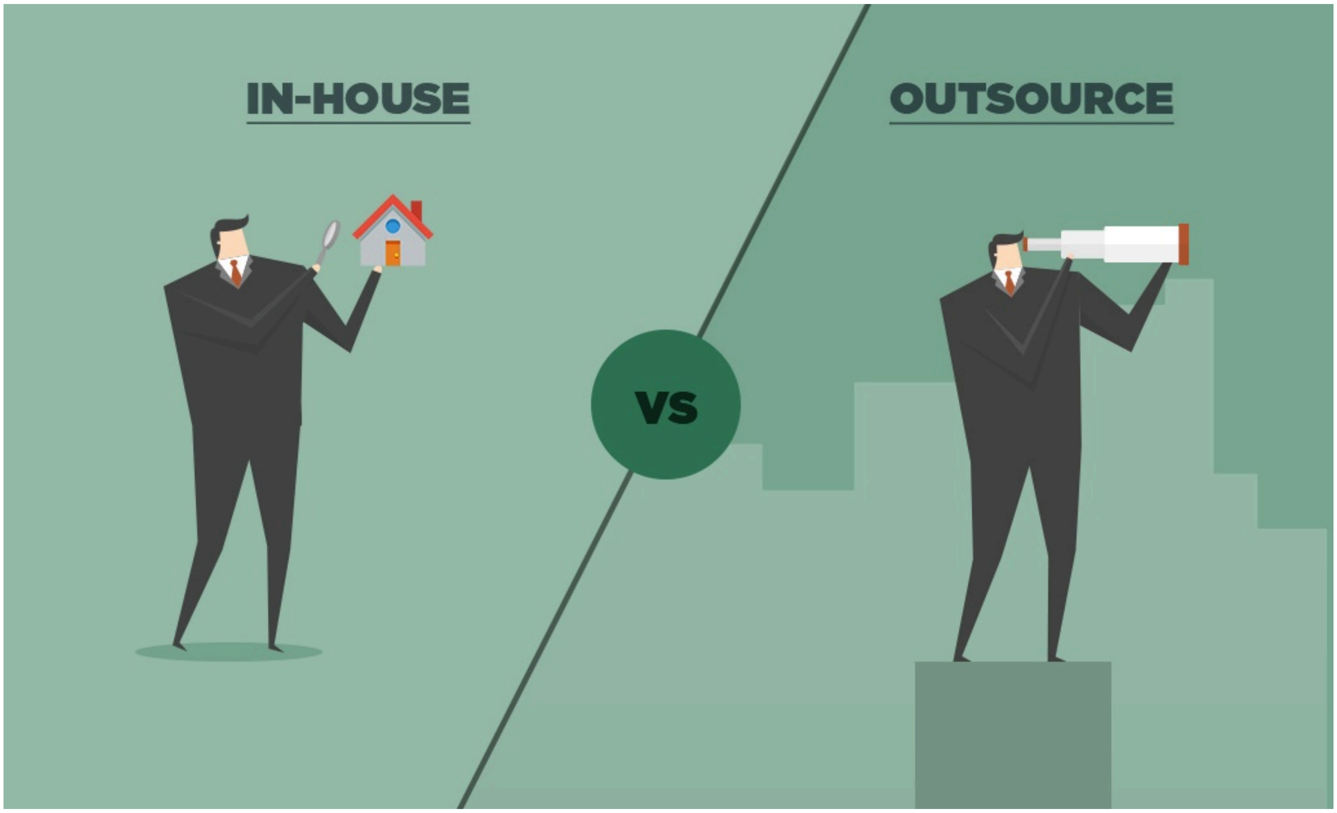

Photo by Amruta Deshpande

In-house operations focus on running the day-to-day activities for NPO's within the organization rather than hiring groups externally. This allows organizations to have complete control of their activities and leverage their current resources. Outsourcing, on the other hand, is when organizations hire other groups or entities to take on specific tasks. This ensures the NPO utilizes experts or groups that specialize in a certain field of the operation to avoid any unnecessary mistakes.

Differentiating In-house vs Outsourcing

In-house

In-house operations occur when organizations make use of their own personnel and team to conduct activities rather than working with others outside of the campaign. One of the main reasons to keep activities in-house is for complete control, this reduces the risks involved with involving entities not directly a part of the process. Another benefit is proprietary information is not released to third parties which is important if you have sensitive information regarding your organization.

Examples of In-house activities

- Handling financials within the organization
- Technical support
- Day-to-day activities

NPO’s can utilize input and insight from their current team to take on various activities. Instead of issuing requests for a list of commodities or tasks, the project team can organize resources among themselves instead. Existing personnel can compile creative approaches for adding value to the IMC campaign. They have the ability to offer design alternatives, unique utilization of resources, and scheduling alternatives that meet all the campaign requirements and by in housing reduce the total project cost. The organization will often assign someone from their team to monitor relationships and provide support from project resources to help ensure success throughout the process.

Outsourcing

Outsourcing is when an organization decides to collaborate with third parties to complete certain tasks that may be difficult, time-consuming or expensive to do internally. There are many ways in which Non-for-profits can utilize outsourcing to benefit their operation, such as hospitals contracting with physicians rather than hiring medical staff, as this could make more sense for them financially and in terms of time management.

Reasons for Outsourcing

- Cost of production
- Save time and energy for internal resources
- Reduced downtime
- Efficiency for operation
- Reach a wider range of knowledgeable personnel

Different types of outsourcing:

1. Multi-sourcing
2. Process-specific outsourcing
3. Offshore outsourcing
4. Project outsourcing

Resource Planning for NPO's

The use of a master schedule is important to ensure resources are working at an efficient rate and organized within the spectrum of the campaign's vision. This type of schedule ensures volunteers and resources are organized in a way that allows for smooth operation in a given campaign. Other factors to consider are maintenance, relationships, changes, among others that must be analyzed consistently as this decision is a key part of the process. Effective planning allows NPOs to:

- Seek necessary support
- Maintain consistency throughout operations
- Expand their network through positive relationships
- Leverage resources they possess

Decision Matrix: Make or Buy

1. Strategic Alliance

High strategic importance, low operational performance. If an NPO decides to form this alliance with another entity, both partners control of the task and work together while remaining independent.

2. In-house (Make)

This allows the organization to have the maximum amount of control over the spectrum of activities. It places high importance on performance and high importance on strategy.

3. Outsource

As previously mentioned, NPOs may decide to hire or work with other groups to aid in the completion of certain tasks that may be difficult to perform on their own.

4. Elimination

Certain tasks may not hold the necessary importance to continue expending resources towards, so organizations may choose to eliminate or remove the task in totality.

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This page contains material taken from:

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CHAPTER 51.

DEVELOPING A NETWORK OF OUTSOURCED PARTNERS

Photo by Nathan Dumlao on Unsplash

Given the limited resources available for NPOs, many of its staff often wear multiple hats and perform various roles within the organization. However, in some cases, the person(s) may not be able to perform all the tasks for developing and managing an IMC campaign and requires an outside party to help.

Defining the Organization's Needs

Before looking into outsourcing activities, the organization needs to understand which tasks require outsourcing and which can be performed in-house. In doing so, an NPO can then establish a partnership with a third-party agency that the organization can reliably work with to avoid costly oversights.

For example, if you find you're preoccupied with marketing and outreach, while the core functionalities of your organization are falling by the wayside, outsourcing marketing challenges can help you reallocate your internal resources to your core business requirements. Choosing strong outsourcing partners is often cost-effective in the long run, and in marketing scenarios, can lead to more effective outreach.

To make a well-informed decision when outsourcing, the organization should first begin with the essential information that encompasses the scope of work required from short-term contractors or long-term partners:

- **Define the campaign goal**: Have a clear understanding of the type of services the organization needs to outsource. Set out the list of tasks along with the expectations and goals that the outsource team will need to achieve. A well-defined campaign goal will help negotiate appropriate terms and prevent paying for additional items or services that are not necessary for the campaign.
- **Set a realistic budget**: Depending on the campaign requirements, having an allocated budget can set the range of acceptable pricing that the organization is willing to spend. Setting an unrealistic budget, however, may constrain the selection process and even lead to unreliable partners.
- **Establish a timeline**: Clearly stating a deadline will help narrow the selection process even further. The organization can easily communicate the degree of commitment they will require from the outside partners.

Common Intermediaries

Ad Agencies

Ad agencies specialize in building communities and brands, utilizing a wide variety of paid and organic channels. This can include social networks such as Facebook, Linkedin, Twitter, and Instagram, as well as paid ad production on popular TV channels or affiliate advertising. Ad agencies utilize the entire marketing mix to craft customized brand-building initiatives and campaigns centred on the unique target market and product of their strategic partners. When it comes to creating an IMC campaign, outsourcing marketing outreach can be an extremely beneficial partnership for a non-profit. However, depending on the campaign, there may be other aspects that would benefit from outsourcing as well.

Distribution

Some of the most common intermediaries are related to product distribution. Moving a good from the producer to the buyer is logistically complex and often handled by an intermediary such as FedEx or UPS. These organizations can utilize economies of scale and a vast network of resources to offer highly specialized delivery services at a relatively low cost and, more importantly, low risk.

E-commerce and Web Development

Maintaining an online presence nowadays is relatively straightforward, so more and more companies do this internally. However, if your brand/campaign utilizes an online storefront or relies on e-commerce, that can be a trickier venture. As a result, some organizations prefer outsourcing this as well.

Public Relations

It helps educate the public, increase donations, find volunteers, and manage the crisis. Public relations can also increase the awareness of a nonprofit and engages donors through online and face-to-face events. Moreover, a public relations firm can handle all the marketing aspects of the nonprofit.

Identifying Resources

There are two methods when it comes to identifying and utilizing the resources available within your organization:

1. Create your strategy and goals and then find the resources required to achieve them.
2. Identify the resources you currently have right away then work within those parameters.

Creating a rough budget early on will help you assess what resources and funds are available to you. Resources you will want to consider are:

- Human (people, skills and time)
- Financial (funding)
- Intellectual (access to information)
- Material (access to equipment, tools, etc.)

Budgeting

Once the resources available to you have been identified you can now create a budget. If funding is likely to be an issue, there are organizations, foundations, and even government grants that can help. If you can identify resources within your organization, such as a video camera, or a filmmaker, you can limit the overall costs of finding those resources elsewhere. Also, partnering with other organizations that have similar goals can help bring together resources that don't currently exist with your organization.

Contracting Outsourced Activities

Once the above key information is established, the organization can identify and compare potential third-party partners. There are various methods and channels an organization can use to find reliable and credible partners:

- **Personal Network:** Reach out to people within the organization's networks who may be able to perform the required jobs. Alternatively, ask if they have used similar services and are willing to provide recommendations.
- **Freelancing Websites:** In the current gig economy, multiple platforms offer a plethora of short-term contractors or freelancers to perform specialized tasks. Like

Upwork.com, Fiverr.com and Freelancer.com offer different talents for different jobs such as copywriting, graphic designs, and video production at varying price ranges.

- **Forums:** Facebook groups and Reddit subgroups are a few modern ways to look for people performing contract work. These sites allow for highly niched groups to get together and advertise their personal or company's services.
- **Established Information Centres:** Seek advice from reliable business advisors within the organization or local business support organizations, such as chambers of commerce. Often marketing and PR firms list their business in directories within these organizations to be discovered in their area.
- **Business Associations:** Attending local business events, trade associations, and exhibitions are a great way to connect with local agencies and contractors. It is a personalized approach that is effective in identifying if the potential partner is credible and relevant.
- **Invite by RFP:** If applicable, the organization may choose prospects by inviting agencies to submit to an RFP. An RFP is an effective way to draw group suppliers and vendors for a campaign that requires long-term and more hands-on support.

Comparing Outsource Partners

Comparing outsource partners can be based on the following group of criteria:

- Quality of service,
- Flexibility and adaptability,
- Ease of communication,
- Experience,
- Payment terms,
- Value-added service.

Price and delivery time are not mentioned here deliberately since they are the tangible factors that can be easily compared with each other but are usually threshold factors. The tangible factors are generally the criteria of the greatest weight in the evaluation process.

When choosing outsource partners, all types of criteria can be considered. Often, they form close relationships. For example, price is inextricably linked to the quality of their work or their experience. However, immeasurable factors such as payment terms and the partner's flexibility have an indirect effect on the price of the service. The organization can also base the selection process by the type of projects the agencies or the freelancers have done and compare public ratings like Google and Facebook reviews.

The criteria presented may not always meet the needs of the organization. Therefore, they should be regarded as a starting point. If required, the list of criteria can be extended or shortened.

The qualifying partners that meet the organization's standards and requirements will then be shortlisted as potential candidates.

Assessing and Choosing Outsource Partners

The next stage of the selection process is the assessment of the shortlisted agencies. Having established the criteria, an organization can analyze the agencies in the given circumstances by applying weight factors. Each criterion is assigned a weighted factor reflecting what is most important to the organization. The agencies are also graded on a scale range from 1 to 5 (1 being the worst-rated and 5 the best). The grading is multiplied by the weight factor and then tallied to achieve a total rating.

The organization can use a simple decision matrix to measure the alternatives (pictured below):

Weighted Decision Matrix

Activity Type: ____________________ Ranking: 1 [worst] to 5 [best]
Budget: ____________________
Timeline: ____________________
Lead: ____________________

CRITERIA	Weight	ALTERNATIVES							
		Company 1		Company 2		Company 3		Company #	
Cost	0.00		0.0		0.0		0.0		0.0
Experience	0.00		0.0		0.0		0.0		0.0
Delivery Time	0.00		0.0		0.0		0.0		0.0
Quality of Work	0.00		0.0		0.0		0.0		0.0
Payment Terms	0.00		0.0		0.0		0.0		0.0
Communication	0.00		0.0		0.0		0.0		0.0
Weighted Total	1.0	—	0.0	'—	0.0	'—	0.0	'—	0.0

- Campaign Information (activity type, budget, timeline, lead)
- Set of criteria based on the organization's preference and values.
- Weight set out for each criterion.
- Name of prospective partners for short-term or long-term contract work.
- Ranking assigned based on the criteria: 1 being the worst and 5 being the best.
- The ranking is multiplied by the weight then added as the total weighted average for each company.
- Determines the total weighted average of the company which is then compared against each of the other prospecting companies having the highest or lowest totals.

Resource: Decision Matrix Template

[Download Decision Matrix Template (Excel)]

Attribution

This page contains material taken from:

Boundless. (n.d.). Marketing intermediaries. Retrieved July 15, 2020, from http://oer2go.org/mods/en-boundless/www.boundless.com/business/textbooks/boundless-business-textbook/product-distribution-16/distribution-channels-100/marketing-intermediaries-469-8202/index.html

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CHAPTER 52.

MANAGING OUTSOURCED OPERATIONS

Photo by Headway on Unsplash

Importance of Outsourced Operations for NPOs

As mentioned in prior pages, outsourcing refers to the delegation of key management areas to outside vendors, contractors or suppliers, usually on a relatively long-term basis, with the expectation of improving quality, strengthening management effectiveness, and perhaps lowering costs. Outsourcing in the nonprofit community differs slightly than in the business sector in that the "key objective" of outsourcing is to become a more effective organization – not simply to save money. For NPOs specifically, a "back-office" functional area that is usually outsourced is that of marketing and communications services, perhaps from a public relations agency or a marketing firm. This is because the success of NPOs achieving their missions rely heavily on strategic communications planning and execution, which requires branding, creation of communication materials (to donors, the media and volunteers for example), and website or special event promotion.

Leverage Tailor-Made Solutions

When you hire social media marketing agencies or digital marketing experts you have the flexibility to use them in a way that best suits the style of your organization. You can get Services tailor-made to specifically fulfill your requirements. There may be times in a year when you run multiple campaigns and require several resources and other times when you don't. When you outsource these internet marketing and SEO activities, you don't have to bear the cost of maintaining multiple resources all-round the year.

Tips for Successful Outsourced Operations

Since outsourcing means working with external vendors, contractors, and suppliers, managing the relationship NPOs have with these groups is extremely important. It can be compared to customer relationship management, which is the way an NPO would manage its relationship with its own audiences. Just as an NPO needs to develop relationships with its audience and stakeholders, it also needs to foster relationships with its vendors, contractors, and suppliers. The desired outcome is a win-win relationship.

Key Characteristics for Successful Outsourced Operations

The following characteristics should exist between the NPO and the public relations, communications and/or marketing firm that will be outsourced:

- Recognition of mutual interdependence
- High level of trust between the organizations
- High-level frequency of both formal and informal communications
- Co-operative attitudes
- Mutual benefits
- Shared risks
- Problem-solving, 'win-win' negotiating styles with an emphasis on managing total costs
- Long-term partnership arrangements
- Open sharing of information by multi-functional teams

Fostering Effective Relationships with Outsourced Partners

An NPOs relationship with its outsourced partner will be the most effective if they establish a clear and strategic partnership with them.

Briefing Opportunity to Kick-off the Outsourced Operations

A 'briefing' provides the opportunity to seriously kick-off the discussions required for an NPO to establish what its outsourced partnership will look like. A few ways to approach the briefing are to:

- Notify the outsourced partner about the importance of meeting together (online, over the phone, or in-person) to talk through the requirements and expectations they must meet, to help the NPO achieve its mission.
- Establish the communication method that will be used between the NPO and the outsourced partner (i.e. via phone, email, online virtual conference tool, and mail);
- Create an open environment that allows the outsourced partner to freely ask questions and propose their ideas.

To conduct the above, an NPO can consider using a briefing template, such as Marke2ing's sample marketing supplier brief to write down the objectives, timing, budget, specifications, and considerations.

Tracking and Evaluating

Throughout an NPO's collaboration with its outsourced partner, it is good practice to keep track of how well the partners are meeting the expectations set at the beginning of the collaboration. There are several templates, such as those available in Microsoft Word templates or SmartSheets, that can provide some inspiration for how organizations can keep notable items organized in one place.

Attribution

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PART XII.

CONTENT CALENDAR

Section Breakdown

In this section, you will learn about content calendars. A **content calendar** is an effective tool to help Non Profits keep organized with their content posting. It allows NPOs to choose what type of content, when to post it, what platform, the objective of the content and anything else they wish to share with their audience.

The topics that this section will go over include:

- What a content calendar is
- Assessing how to use a content calendar
- How to use a content calendar
- How to make a content calendar

CHAPTER 53.

DEFINING CONTENT CALENDAR

A **content calendar** is a tool that helps organizations to plan the post contents for a specific time frame in the future. In a content calendar, we should determine what platforms to use, such as an organization's website, or its social media platforms. Also, the content calendar should include diverse post topics, such as social events and the organization's internal events as well as the detailed headlines and call-to-action for each topic.

Since content calendars are a tool to plan and manage the content created for a website, organizations and NPOs tend to use content calendars for organizing writers and sticking to deadlines.

In the video below, Mike Hale presents at the Worldcamp Chicago the elements that make up a good content calendar while explaining why content calendars are useful for organizations and NPOs. His presentation also looks at the tools that can be used to manage a content calendar, and how to integrate the tools with a WordPress website.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://kpu.pressbooks.pub/openimc/?p=217#oembed-1

Attribution

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Lasica, J. D. (2013, January 29). A messaging calendar is not a content calendar. Retrieved fromhttps://www.socialbrite.org/2013/01/29/messaging-calendar-is-not-content-calendar/

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CHAPTER 54.

CHOOSING THE BEST CONTENT CALENDAR FOR YOUR NEEDS

Ensuring that you select the right content calendar template for your organization is important. Content calendars are subjective, and picking a template can be tricky without proper analysis of what you are using it for. Understanding the difference in templates enables your organization to better align your intended posts with your target audience. This would work towards creating a more effective campaign with the correct content calendar type.

Differences Between the Templates

NPO Event Content Calendar

This template is designed to help small- to medium-size NPOs to host events. Different steps that organizations need to take into account to plan an event are described on this template as well as how you would organize your content around it. They will be a slight lag between content posts for this template based on the time leading up to the event when the event is hosted and post-event activity.

NPO Non-Event Content Calendar

This template is a general design for how to organize your content broken down into one for a small NPO and another for a large NPO. This template can be changed based on what you want to add to it. It is a basic design to get you started on how to create a content calendar and help you understand what can be added for the different sized NPO's.

Small-sized NPO

Any organization composed of less than 10 employees.

Medium-sized NPO

Any organization that has more than 11 employees working for them, but less than 50.

Templates to Download

To download and use the templates outlined in the questionnaire above, click on the respective link that suits your organizations content calendar needs:

- Small-sized, NPO with no Events Content Calendar
- Medium-sized, NPO with no Events Content Calendar
- Small-sized, Event-based NPO Content Calendar
- Medium-sized, Event-based NPO Content Calendar

CHAPTER 55.

CONTENT CALENDAR MAKING PROCESS

How to Use and Make a Content Calendar

Since there are several different types of content calendars that are used by a number of different organizations and NPOs, we have provided instructions on how to use a content calendar.

Before an organization starts using a content calendar, it should choose a time frame for their content calendar to ensure they accomplish their objective before the established deadlines.

Steps to Use a Content Calendar:

1. Choose a time frame for the content calendar
2. Choose how many times you wish to post your content on your channels (website, social media platforms, etc.)
3. Decide on your goals and objectives for your content calendar

> Examples
>
> - Short-term and long-term objectives could be used for the content calendar depending on the time frame the organization decides on.
> - NPOs may want to set short-term objectives to increase brand awareness and increase engagement per post to call customers to support their cause.
> - Organizations may want to set short-term or long-term objectives to increase revenues and drive website traffic to increase conversions.

4. Figure out a time that works best to capture the attention of your audience
5. Depending on the size of the organization, decide on the theme of the content so that each post is consistent

> Examples
>
> - Small to medium-sized NPOs might not need a theme for their content and may prefer

focusing their resources to accomplishing their goals and objectives instead.

◦ Small to medium-sized organizations could benefit from using a theme for their content as small to medium-sized organizations are known to have a higher amount of resources.

6. Decide on the content type for the posts (pictures, videos, blogs) and accompanying text (captions, descriptions, instructions, hashtags, headers, sub-headers)
7. Decide on the metrics that will be used to measure the effectiveness of the posts

Examples

◦ Metrics can include monitoring and measuring the engagement of posts to social media platforms through the offerings of a claimed business account on social media platforms such as Instagram, Twitter, and Facebook.
◦ Engagement of posts to social media platforms can be measured through tracking the number of 'likes' and comments on the post, along with measuring the increases of follower count.

8. Begin to publish your posts to the appropriate channel(s)
9. Make an effort to stick to the time frame of the content calendar to accomplish the short-term or long-term objectives

Following this 9 step guide will provide you with the means of creating your first content calendar. This content calendar will allow you to balance your social media posts on a daily, weekly, or monthly basis and allow you to not overload your target audience with posts. Instead, it enables you to produce content at calculated peak times that provides your organization with gaining the highest impact from your targeted audience. This includes gaining higher awareness levels, reaching a more diverse population, or even achieving better engagement levels from your audience.

Content Calendar Break Down

After assessing which content calendar is right for your organization and learning how to make a content calendar, it is important to know what each section means. As per the content calendar templates in the "Assessing Content Calendar" section, here is a breakdown of one of the templates, the largest one of the four templates.

1. Medium-Sized, Event-based NPO

Date	Time	Weekly Measurable Objective	Content Objective	Content	Media Platform(s)	Intended Audience	Call to Actions	Theme	Tone	Headline	Hashtag	Metrics	Associated Web Link
Pre Event													
Week 1													
Event													
Week 1													
Post Event													
Week 1													

- **Date:** Choose the amount of times per week you wish to post content. This number will vary per each organization's objective, and it is recommended to increase the number of posts the closer you get to your event. The time of day is also important, as you should learn the time your target audience is active on each social media platform to increase engagement.
- **Weekly Measurable Objective:** You can breakdown each week's objective in this section. This allows you to slowly build up to your end goal, which is the event. The objective per week allows you to break down your goal and allows you to see how much time is needed to launch your event.
- **Content Objective:** You can set objectives per each content post. You can use this in conjunction with the weekly objective to help further breakdown your end goal.
- **Content:** Decide on which content you would like to post. This can be images, an external link, or simply a well-crafted post, and is dependent on the organization and it's goals.
- **Intended Audience:** This allows you to focus on a more niche audience. You may have some content that targets certain niche audiences, or some content that targets all of your target audience. The intended audience is dependent on your content and objectives.
- **Call to Actions:** Decide on specific call-to-actions per each post. Each post should have a call-to-action that is related to your contents objective. Examples include:
    - Sign up today
    - Visit our website
    - Contact us
- **Theme:** You may choose to have weekly themes. These can include to have a welcoming theme, to something more focused on community involvement.

- **Tone:** Similar to the theme, the tone will be how you wish to present the content you wish to send or post.
- **Headline:** The headline will be the theme of what you wish to post about. The headline is important, as it will catch the audience's attention.
- **Hashtag:** Select certain hashtags to lure your audience in. Hashtags are important as it includes more keywords and search terms to reach your target audience.
- **Metrics:** Determine certain metrics to evaluate when making a post. This can help measure and evaluate the effectiveness of each of your posts.
- **Associated Web Link:** Add any external web link you may deem important for your post. Not all your posts need an external source or image, as your posts can be self curated as well.
- **Pre-Event:** Determine the pre-event promotional cycle length. This will vary on each event, how much time you have to organizing it, and the size of the event. In this period, you will gather volunteers, donations, increase the event's awareness, or any other goals you deem to be important. You can add more weeks under this section as needed.
- **Event:** During the event, you can post about how the event is running, and give everyone a last chance to participate. You can showcase the success of the event during this stage. Depending on the event, it might be a one day event, or week long event, so you can add or subtract the amount of time needed in this stage.
- **Post Event:** After the event, you can showcase the success of the event. This can include, how much money was raised, how many people you helped, or how you brought together the community. In this stage, you can post and email out to volunteers, thanking them for their help. You can add or subtract more weeks or days under this section as needed.

2. Example Content Calendar: Black Lives Matter

Black Lives Matter Content Calendar									
Date	Time	Content Objective	Content	Media Platform(s)	Call to Actions	Headline	Hashtag	Metrics	Associated Web Link
Week 1									
Sunday, July 12,2020	11:00 AM	Introduce Public Awareness Campaign	Video	Youtube Instagram Facebook	Visit our website to see how you can get involved	"Its time to stand up for Black Lives Matter	#blackouttuesday #blm	Youtube likes, views, and comments, Instagram Business Account, Facebook Likes	https://blacklivesmatter.com/
Tuesday,July14,2020	9:00 AM	Continue Public Awareness Campaign	Picture	Instagram Facebook Twitter	Visit our website to see how you can get involved	"Black lives have always mattered."	#blm #blackouttuesday #blacklivesmatter	Instagram Business Account, Facebook Likes, Twitter Retweets and Likes	https://blacklivesmatter.com/

Excel grid example of a content calendar. Download BLM Content Calendar [Excel] for an accessible version.

3. Example Content Calendar: The Surrey Breakfast Club

The Surrey Breakfast Club Content Calendar

Date	Time	Weekly Measurable Objective	Content Objective	Content	Media Platform(s)	Intended Audience	Call to Actions	Theme	Tone	Headline	Hashtag	Metrics	Associated Web Link
Week 1													
Wednesday, July 8, 2020	9:00 AM	Create Movement Awareness for Surrey Breakfast Club, achieve 50 likes on Facebook posts, obtain 100 followers on Instagram account	Awareness	Movement Information	Instagram	All Audiences	"Learn more about your meals "	Understanding nutritional value	Informative	"Every Child deserves a meal"	#Nutritional #bettereating #education #healthyliving	Number of Impressions, Followers & Shares	http://conditions.health.qld.gov.au/HealthCondition/condition/8/78/372/how-children-develop-food-and-nutrition-1-to
Friday, July 10, 2020	1:00 PM		Engagement	Promotional	Facebook	Responsible Rebecca	"Click here to read more"	Promoting Healthy Eating Habits	Energetic	"Affordable food's that boost your brain"	#brainpower #affordable #healthyeats#nutritional	Number of Impressions, Likes & Shares	-
Sunday, July 12, 2020	12:00 PM		Awareness	Movement Information	Twitter	Responsible Rebecca	"Learn how you can help"	Benefiting the lives of others	Optimistic	"How you can change a child's life"	#Changealife #Howtohelp #healthyliving #children	Retweets, Confirmed Reach, Conversions	-
Tuesday, July 14, 2020	9:00 AM		Engagement	Company Story: Social Media post depicting the story of Surrey Breakfast Club and how they came to be	Instagram	All Audiences	"Watch our story now"	Origin Story	Informative	"We Care About your Children"	#Originstory #Nutritional #Educational #History #NPOS	Potential Reach, Repeat Visits, Followers, Sentiments (Appeal)	

Excel grid example of a content calendar. Download Surrey Breakfast Club Content Calendar [Excel] for an accessible version.

The above image is an example of a one-week content calendar from Surrey Breakfast Club. The content calendar includes multiple elements to specify a date, objectives, content, platforms, target audiences, themes, call to actions, headline, etc. A strong and successful content calendar would be well balanced and aligned with the core values of your organization and the intended target audience for your organization, aiding in conducting a more effective campaign for the non-for-profit organizations. Having a strong content calendar will also increase efficiency for your organization and will facilitate you to track the performance of each media used depending on the objectives you choose.

Resources for Content Calendar

Content Calendar Templates

Given that there various content calendar templates available for usage online, we have provided the direct download link to various templates on SmartSheets that can be helpful for organizations and NPOs. The templates available for download are free but are not open-source content, please use at your own discretion. The instructions that are provided above can also be used on the templates available for download, below:

Marketing Editorial Calendar Template [Excel]

Blogging Editorial Template [Excel]

Marketing Campaign Calendar Template [Excel]

Email Marketing Calendar Template [Excel]

Social Media Marketing Calendar Template [Excel]

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Free Social Media Templates for Excel. (n.d.). Retrieved from https://www.smartsheet.com/social-media-templates

CHAPTER 56.

SUMMARY

Key Takeaways

A content calendar is a tool that helps an organization to plan its website and social media campaigns. You should consider the post topics, content type, and post time in the content calendar. The following points are what you should keep in mind for creating a content calendar:

- Using the correct template will help you properly align the content you publish with your target audience.
- Important things to consider when using a content calendar: time frame, frequency of posts, type of content, goals, and objectives.
- Setting short and long-term goals for your content calendar will aid you in maximizing the effectiveness of your campaign.
- Decide what metrics will be used to measure the overall success of the content you post.
- Metrics often include monitoring the engagement through 'likes' and comments on social media posts.
- These metrics are available on the most popular social media platforms including Instagram, Twitter, and Facebook.
- Creating a content calendar through the included templates that work correctly for your organization will have a substantial effect on the success of your campaign.

PART XIII.

IMC GUIDE IN ACTION

Section Breakdown

This section will walk through the process of creating an IMC Guide for a deeper understanding, Surrey Breakfast Club (SBC) is a fictitious NPO created as an example for this IMC guide.

The topics that this section will go over include:

- How to implement an IMC Guide
- Understand how to make Objectives, Strategies and Tactics
- Find your Target Audience, and how to reach them
- Understand the use of a timeline and budget

CHAPTER 57.

CASE STUDY: THE SURREY BREAKFAST CLUB

The Surrey Breakfast Club

About SBC

The Surrey Breakfast Club (SBC) is an NPO in support of the Surrey education system that assists in raising external funding that is used to provide nutritional meals for students from low-income and marginalized families. The purpose of the organization is to help the public school system focus its funds on improving the quality of classroom learning and investing in additional resources for their students.

SBC believes that no child should have to sacrifice the quality of their education because of hunger. Its goal is to eradicate food insecurity and provide access to nourishing food so that children and youth can stay full and focused in school.

The Better Snacking Program

This summer, SBC is looking to introduce the “Better Snacking” program that educates and encourages children and their parents to develop better eating habits at school and at home. SBC has partnered with local nutritionist chefs Todd Rozell and Shawna Barker, as well as healthcare providers to host interactive workshops at participating schools. The families will get a chance to try healthy, affordable snacks and learn new easy-to-make recipes to try at home.

SBC has gained support from a few local businesses offering sponsorship, monetary donations, gifts in kind, and even their time to volunteer at the events. Conscious Cookie Co., a two-woman team that used their passion for baking into making guilt-free, high protein, and gluten-friendly cookies has offered to provide samples of their delicious cookies at the event. SBC hopes to attract more like-minded businesses to support the program.

Developing the Campaign

The aim of the campaign is to build a community in support of children’s health and education.

The Surrey Breakfast Club is a fictitious NPO created for the purpose of illustrating how to develop an IMC guide.

CHAPTER 58.

CAMPAIGN DEVELOPMENT

Write within the blank spaces below.

Primary Research:

Secondary Research:

Strategic Insights:

CHAPTER 59.

CAMPAIGN MATERIAL

Creative Brief

The creative brief should be straight-forward for your designer or design team to read. It should **not** be designed heavily to eliminate bias and personal preferences in the design decision-making process. Here is a direct link to an amazing creative brief example.

Brand Guidelines

Primary Logo

All Surrey Breakfast Club logos are by Carmen Cheung

The Surrey Breakfast Club identity is inspired by establishing the SBC as a leader and supportive community in educating children and their families about healthy eating. In the symbolism of the brand identity, the egg represents SBC as a growing supportive community for healthy eating and the toast/school represents the outcome of healthy eating, a better education. To keep the identity playful and friendly, the egg also has a smile to encourage children and parents to join the SBC in living healthier lives.

Reverse Colour

New logo for Surrey Breakfast Club with yellow font and an egg inside a brown house

Black-and-White versions

Different logo for Surrey Breakfast Club featuring black font with a black and white logo inside the house.

Different logo for Surrey Breakfast Club featuring a black background with white letters and white egg inside a white house.

Horizontal Logo

Horizontal logo of Surrey Breakfast Club on yellow background.

The Surrey Breakfast Club's secondary application of the logo (horizontal) is used for applications where the primary logo is not appropriate or can't be used as effectively i.e. banners.

Reverse color and black-and-white versions

The horizontal Surrey Breakfast Club logo with yellow letters on a white background.

The horizontal Surrey Breakfast Club logo with black letters on a white background.

The horizontal Surrey Breakfast Club logo with white letters on a black background.

Surrey Breakfast Club Icons

Surrey Breakfast Club logo featuring an egg inside a house.

Icon usage is best used for smaller applications like social media profile pictures and for applications where the name, "Surrey Breakfast Club" will be present. For example, on Instagram, the handle @surreybreakfastclub will always be present beside your profile picture. Therefore, there is no need to repeat SBC in the profile picture.

Reverse color and black-and-white versions

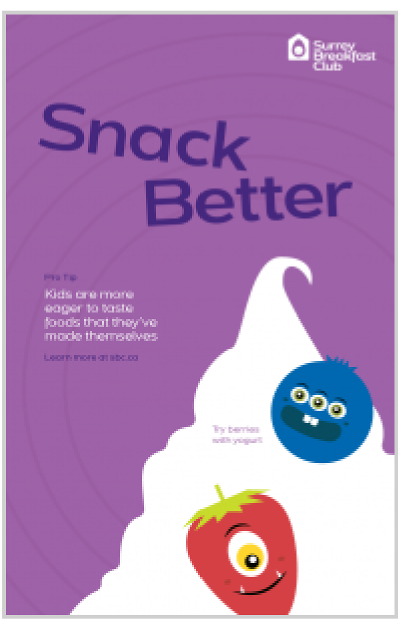
Surrey Breakfast Club logo featuring a yellow egg inside a brown house.

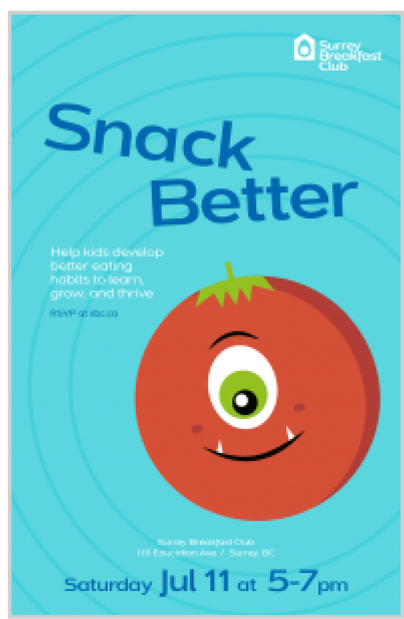
Surrey Breakfast Club logo featuring a white egg inside a black house.

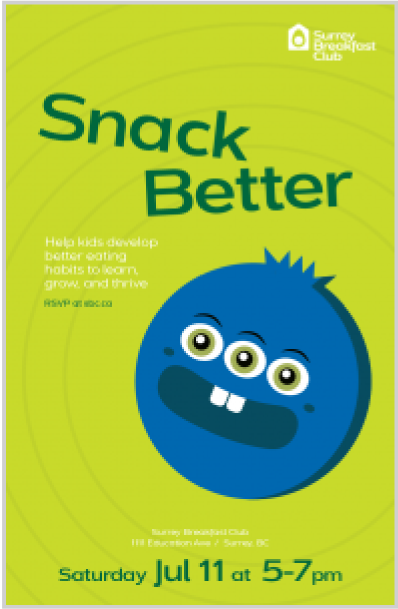
Surrey Breakfast Club logo featuring a black egg inside a white house.

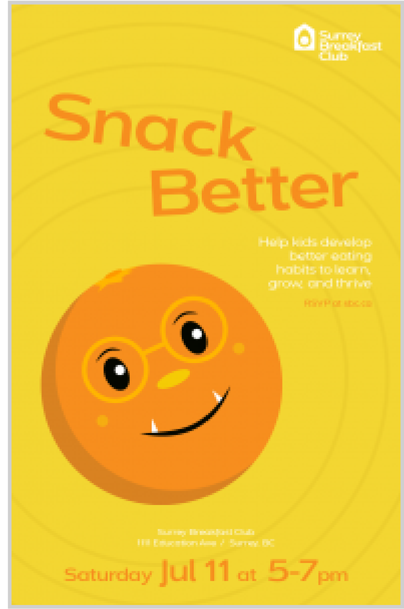
Visual Identity: Campaign Posters

The SBC's campaign to promote the "Better Snacking" program will consist of four event posters. Three of the posters represent SBC's commitment to "[helping] kids develop better eating habits to learn, grown, and thrive." To incorporate SBC's brand personality as "fresh, imaginative, bold, and adventurous," the spokespeople for Surrey Breakfast Club are friendly fruity monsters. It can be difficult to persuade children and families to change eating behaviors, so presenting healthy eating as fun, easygoing, attainable will catch the eyes of SBC's audience over the expected photograph of a garden.









Using a bright, friendly color palette, it is best to use the primary white logo of the Surrey Breakfast Club for this context.

Target Audience

Photo by Taylor Wilcox on Unsplash

The primary audience for Surrey Breakfast Club is teachers, educators, and counselors in the Surrey community who are active allies. The secondary audiences include parents of low-income and marginalized families and outspoken parents who are key leaders in the community.

CHAPTER 60.

CAMPAIGN DELIVERY

Campaign Objectives

The goal of SBC's Better Snacking campaign is to increase the participants and registered families of the SBC Program. Additionally, SBC would like to create awareness in the community about this service and collect donations to sustain the launch of the program.

Campaign Strategy and Tactics

1. June 2020 – October 2020: Collect donations to cover the cost of two meals a day for 150 students for the fall semester ($10,500).
2. Gain a $20 monthly-payment service subscriber base of 200 people by September 15, 2020.
3. Get 25% of students in the Surrey School District to sign up for Surrey Breakfast Club by September 15, 2020.
4. October 2020: Get endorsed by a local social media influencer to raise awareness for the SBC
5. June 2020 – August 2020: Gain more traction by 40% online by live streaming once bi-weekly

Campaign Touchpoints

1. Facebook Page and Events
2. Community Bulletin Boards
3. Local Farmer's Markets
4. School Events

Campaign Timeline and Budget

SBC will begin the Better Snacking campaign on June 1, 2020, and run it until October 2, 2020, with the official launch of Surrey Breakfast Club on September 14, 2020.

2020 Timeline

Activity	June	July	August	September	October
Campaign Launch					
Advertising Campaigns					
Program Launch					

The Canadian and B.C. government supply the initial funds of $6,500 which will be used to pay initial workers and create resources to collect donations. From this donation, $5,000 will be put towards advertising.

2020 Advertising Budget

	Budget	Spending
Total	$5,000	
Transit Ads		($2,000)
Social Media Ads		($1,500)
Newspaper Ads		($700)
Posters		($700)
Flyers/Brochures		($100)

Assessment

SBC will track monthly enrollment to the Better Snacking Campaign in a simple and easy to read way:

2020 Monthly Enrollment

Month	Total Participants	Full-Time Enrolled	Part-Time Enrolled
January 2020	55	44	10
February	75	60	15
March	81	63	18
April	101	78	23
May	88	62	26
June	70	49	21
July	–	–	–

Vendor & Supplier Sourcing

To promote the workshop event, SBC will require 20, 24″ × 36″ print advertising to post around the school grounds. During the event, they will need one 6′ × 3′ banner showcasing the event name and the sponsor's logo in full colour which will be placed at the entrance of the schools. The banner will need to be sturdy and reusable throughout the campaign. Additional way-finding signage will also be needed to direct attendees to the auditorium. There will also be pamphlets that will be distributed during the event.

The organization needs to outsource the printing of the large format banner and poster-sized ads. All standard sized prints including the pamphlets and signage can be printed in-house using office printers to save cost.

Vendor List

VENDOR NAME	Surrey Digital Printing	OVERALL RATING		VENDOR TYPE	PRINTING
CONTACT NAME	Jared Cotterill	IMPORTANT DATES		PRODUCT / SERVICE DESCRIPTION	
PHONE 1	604-572-8100	INITIAL CONTACT	June 1, 2020	▪ Marketing materials ▪ Indoor/Outdoor signage ▪ Tradeshow displays	
PHONE 2		MOST RECENT REVISION			
EMAIL	info@surreydigital.com	CONTRACT REVIEW			
MAILING ADDRESS LINE 1	#110-7808 132 Street	CONTRACT SIGNED		NOTES	
MAILING ADDRESS LINE 2		CONTRACT EXPIRES		▪ 5.0 Star reviews from 43 people on Google	
CITY, STATE, & ZIP	Surrey, BC	BUSINESS HOURS	M-F: 8AM – 5PM		
WEB ADDRESS	www.surreydigital.com/	OTHER			
INITIAL QUOTED COST	$550.00	REVISED COST		FINAL COST	

VENDOR NAME	Minuteman Press Surrey Printer	OVERALL RATING		VENDOR TYPE	OTHER
CONTACT NAME	Ryan Sheepwash	IMPORTANT DATES		PRODUCT / SERVICE DESCRIPTION	
PHONE 1	604-572-8558	INITIAL CONTACT	June 1, 2020	▪ Commercial prints ▪ Indoor/Outdoor signs ▪ Promotional products ▪ Direct mail marketing	
PHONE 2		MOST RECENT REVISION			
EMAIL	info@minutemansurrey.com	CONTRACT REVIEW			
MAILING ADDRESS LINE 1	7561 134a Street	CONTRACT SIGNED		NOTES	
MAILING ADDRESS LINE 2		CONTRACT EXPIRES		▪ 4.4 start review on Google from 61 customers	
CITY, STATE, & ZIP	Surrey, BC	BUSINESS HOURS	M-F: 9AM – 5PM		
WEB ADDRESS	www.minutemansurrey.com/	OTHER			
INITIAL QUOTED COST		REVISED COST		FINAL COST	

Image screenshot of a vendor tracker Vendor Management Template via Smartsheets

Vendor Assessment

To compare and assess the potential vendors for print advertising, SBC can use a table that allows them to evaluate the companies based on the criteria set out by the campaign manager. Each criterion is assigned a weighted factor reflecting what is most important to the organization. The suppliers/vendors are also graded on a scale range from 1 to 5 (1 being the worst-rated and 5 the best). The grading is multiplied by the weight factor and then tallied to achieve a total rating.

Vendor Scoring Sheet

Evaluation Criterion	Weight Factor	Minuteman Press		Surrey Digital	
Price	.3	2	*(0.6)*	4	*(1.2)*
Quality of Product/Work	.2	5	*(1.0)*	4	*(0.8)*
Delivery Lead Time	.15	4	*(0.6)*	4	*(0.6)*
Experience	.2	5	*(1.0)*	4	*(0.8)*
Flexibility	.05	3	*(0.15)*	3	*(0.15)*
Financial Standing	.05	5	*(0.25)*	5	*(0.25)*
Organizational Potential	.05	5	*(0.25)*	5	*(0.25)*
Total	1.0	–	*3.85*	–	*4.05*

In this example, Surrey Digital Printers scored the best out of the shortlisted companies with pricing being a big factor.

Marketing Communications

A content calendar helps the SBC stay organized to promote the Better Snacking program. It contains a set schedule of when and what to post on all social media platforms that the organization chooses to focus on.

MONDAY 07

TWITTER

TIME OF LAUNCH	CONTENT TITLE	COPY	IMAGES	LINK	CLICK ENGAGEMENTS
12:30 AM					
4:30 AM					
8:30 AM	Who are we?	Surrey Breakfast Club is a NFP organization in support of the Surrey education system raises funding to provide nutritional meals for students of low-income families	SBC Logo		
12:30 PM					
4:30 PM					
8:30 PM					

FACEBOOK

TIME OF LAUNCH	CONTENT TITLE	COPY	IMAGES	LINK	CLICK ENGAGEMENTS
2:30 AM					
6:30 AM					
10:30 AM	Who are we?	Surrey Breakfast Club is a NFP organization in support of the Surrey education system raises funding to provide nutritional meals for students of low-income families	SBC Logo	facebook.com/events/bettersnacking	
2:30 PM					
6:30 PM					
10:30 PM					

INSTAGRAM

TIME OF LAUNCH	CONTENT TITLE	COPY	IMAGES	LINK	CLICK ENGAGEMENTS

Sample content calendar

Click the link for an example of how the SBC has conducted their social media content calendar: SBC Content Calendar

TEST YOUR KNOWLEDGE

Identify The Difference Between a Vendor and Supplier

1. Between vendors and suppliers – which directly deals with items in bulk rather than selling a few products over time?
    - Supplier
    - Vendor
2. True or false – vendors have an indirect relationship with the manufacturer
    - True
    - False
3. Between vendors and suppliers – which has a B2B market relationship (meaning it links one business to another)?
    - Vendor
    - Supplier
4. Between vendors and suppliers – input the word that fits each of the following statements:
    - A is the first entity that takes products to retailers.
    - A is the last entity that sells the product to the customer.

1. True or false – vendors provide products and/or services that can be easily mimicked
    1. True
    2. False

Answers:

1. Supplier
2. True
3. Supplier
4. Suppler, Vendor
5. False

KEY TERMS

Marketing plan: a written document that details the necessary actions to achieve one or more marketing objectives.

Marketing objectives: goals that must be achieved in order to capture a larger customer group, satisfy customer needs, and identify opportunities to spread brand awareness or reinforce its reputation.

Campaign objective: a defined goal that acts as a subordinate to a marketing initiative and provides direction to the team so that they can reach their marketing objectives.

Strategy: a plan of action intended to accomplish a specific goal. Strategies within any business in relation to marketing, have different levels in which all should be connected including the business strategy, marketing strategy, and IMC strategy.

Push strategy: used to ensure the consumer is aware of the existence of the product.

Pull strategy: motivates customers to seek out a product or service.

Marketing tactic: a technique or tool that the organization can utilize to achieve its marketing strategy.

Demographics: basic information about the target audience such as age, sex, job, income, education, % of population

Geographics: where the target audience lives, works, spends their time

Psychographics: values and mindset of the target audience, what they believe and how they think/feel about the world around them

Behavioural: how the psychographics of the target audience affects their behaviour – where they shop, what they prefer, causes they support

Touchpoint: a point at which a potential customer or existing customer comes into contact with an organization or brand.

Timeline: scheduling system used by an organization to accomplish tasks within a specified time period

Top-down budgeting: budgeting method in which top management sets the overall amount the company will spend on promotional activities for the year, which is then allocated among all of the advertising, PR, and other promotional programs.

Bottom-up budgeting: budgeting method in which an organization starts each year with a clean slate, first identifying promotional goals (regardless of past performance) and allocating enough money to achieve those goals.

Objective-task budgeting: the most common budgeting method in which a company sets the objective or task they want the promotion to achieve, then estimates the budget needed to achieve it; top management reviews and approves the budget recommendation.

Key performance indicators: metrics that will be used to evaluate the effectiveness of the IMC campaign.

In-house operations: when organizations make use of their own personnel and team to conduct activities rather than working with others outside of the campaign.

Outsourcing: the delegation of key management areas to outside vendors, contractors or suppliers, usually on a relatively long-term basis

Content calendar: a list or template for all of the posts and content that your organization or NPO plans to upload over a specific duration of time.

Gig Economy: an institutional basis and production activity that allows individuals to enter into a certain industry and generate income without having a formalized employment relationship based on work contracts.

ACCESSIBILITY OF THIS TEXTBOOK

The web version of this resource *An Open Guide to Integrated Marketing Communications (IMC)* has been designed to meet Web Content Accessibility Guidelines 2.0, level AA. In addition, it follows all guidelines in Appendix A: Checklist for Accessibility of the *Accessibility Toolkit – 2nd Edition*. It includes:

- **Easy navigation**. This resource has a linked table of contents and uses headings in each chapter to make navigation easy.
- **Accessible videos**. All videos in this resource have captions.
- **Accessible images**. All images in this resource that convey information have alternative text. Images that are decorative have empty alternative text.
- **Accessible links**. All links use descriptive link text.

Accessibility Checklist

Element	Requirements	Pass?
Headings	Content is organized under headings and subheadings that are used sequentially.	Yes
Images	Images that convey information include alternative text descriptions. These descriptions are provided in the alt text field, in the surrounding text, or linked to as a long description.	Yes
Images	Images and text do not rely on colour to convey information.	Yes
Images	Images that are purely decorative or are already described in the surrounding text contain empty alternative text descriptions. (Descriptive text is unnecessary if the image doesn't convey contextual content information.)	Yes
Tables	Tables include row and/or column headers that have the correct scope assigned.	Yes
Tables	Tables include a title or caption.	Yes
Tables	Tables do not have merged or split cells.	Yes
Tables	Tables have adequate cell padding.	Yes
Links	The link text describes the destination of the link.	Yes
Links	Links do not open new windows or tabs. If they do, a textual reference is included in the link text.	Yes
Links	Links to files include the file type in the link text.	Yes
Audio	All audio content includes a transcript that includes all speech content and relevant descriptions of non-speech audio and speaker names/headings where necessary.	n/a
Video	All videos include high-quality (i.e., not machine generated) captions of all speech content and relevant non-speech content.	No
Video	All videos with contextual visuals (graphs, charts, etc.) are described audibly in the video.	Yes
H5P	All H5P activities have been tested for accessibility by the H5P team and have passed their testing.	Yes
H5P	All H5P activities that include images, videos, and/or audio content meet the accessibility requirements for those media types.	Yes
Formulas	Formulas have been created using LaTeX and are rendered with MathJax.	n/a
Formulas	If LaTeX is not an option, formulas are images with alternative text descriptions.	n/a
Font	Font size is 12 point or higher for body text.	Yes
Font	Font size is 9 point for footnotes or endnotes.	Yes
Font	Font size can be zoomed to 200% in the webbook or eBook formats.	Yes

KNOWN ACCESSIBILITY ISSUES AND AREAS FOR IMPROVEMENT

The following videos only have automatically generated captions and may not be fully accessible for people who need accurate captions to understand the content:

- "Measuring Along the Ladder of Engagement Grist" in the Applying the Engagement Ladder Theory chapter.
- "Planning Your Marketing Timeline" in the Timeline chapter.

This statement was last updated on July 14, 2023.

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