

The information below is an overview of requirements and for further more detailed information, support and guidance plus associated templates etc please contact the BVA Group Development team via telephone 01256 423816 or email [admin@bvaction.org.uk](mailto:admin@bvaction.org.uk) (please quote "BVA Group Assistance" in title). [www.bvaction.org.uk](http://www.bvaction.org.uk)

A great marketing strategy will help your charity reach more people and generate more income. Without one, you could end up wasting a lot of money and time. So here's everything you need to know.

Strategy is hard. It's not rocket science; but it's hard because you have to make choices about what you want to do - and what you don't. That means difficult decisions. But the alternative is a woolly, vague strategy that serves no-one. The starting point for your marketing strategy should be what your organisation is trying to achieve. What are the goals for your charity this year, where do you want to go and how are you going to get there?

Once you've familiarised yourself with your organisation's strategy, here's how to create your marketing strategy:

#### **Take a look at your environment**

Every strategy should start with an analysis of the key factors affecting your charity. Some of this should be big picture 'macro' stuff (eg the political, economic, social and technological factors affecting charities similar to yours) and some should be 'micro' factors specific to your charity, such as who your competitors are, and what the main challenges are for your management and finances. Frameworks such as PEST and SWOT can be useful here as lenses through which to view the climate you're in. In particular, what are the opportunities and risks around digital and social media?

There are some good tips about marketing frameworks on Marketing Teacher. Don't get too hung up on them though. The most important thing is to take an honest and balanced view of where you're at and the key opportunities and threats.

#### **Set objectives**

This is where you decide what you want your charity to achieve through your marketing. Perhaps a fundraising target, revenue target or improvements to your brand or website. Whatever you decide, your objectives need to be SMART (specific, measurable, achievable, realistic and timed to when you want to achieve them by). Clarity is the aim. Think about how you will measure whether you have achieved them. For example 'to be a leading charity' is too vague and therefore hard to track. The beauty of digital is that it will make measurement much easier- if you want to reach more people, that is easy to measure on social media.

#### **Key messages**

You can begin focusing your strategy a little more by including key messages at this point, along with which segments of your target audience each message is aimed at. Try to be as specific as possible. If finance directors in housing associations are an important target for your key messages, say so. In the digital age you have to fight hard for people's attention so your content should be as powerful and punchy as you can make it.

#### **Priority segments**

This is the really hard bit because you need to choose who in your target audience you want to prioritise. If you're unsure, consider running a workshop for your senior management team to review the options. You may also be able to reach new audiences through digital communications, but be as specific as possible on who you're targeting.

#### **Positioning**

How do you want your charity to be regarded? This information should be in your brand guidelines. If not, again it's worth looking at your ideas with senior management. Does digital offer opportunities to make your brand more approachable? Could getting your leadership team on social media influence perceptions of your charity's transparency?

#### **Evaluation**

How will you know if your strategy has been a success or not? It's time to put some metrics in place here, for example whether you have achieved income targets, how your charity has been rated in stakeholders surveys, or how your campaigns are performing. A variety of metrics is fine, as long as they measure what you are trying to achieve. Measuring both on and offline is equally important. It is suggested creating a simple dashboard of key metrics.

Once you've got your marketing strategy, it's time to work out how to put it into practice through your marketing plan.

*Acknowledgment to <http://www.charitycomms.org.uk>*