

**MARKETING AND PROMOTIONS PLAN FOR  
[NAME OF YOUR NONPROFIT ORGANIZATION]  
[date]**

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*(There is section of the plan is completed for each product or service.)*

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**Description**

This plan describes our overall strategy in marketing and promoting our nonprofit organization and its products and services. The marketing committee of the board of directors is responsible to oversee the overall development and implementation of this plan.

**POSITIONING AND IDENTITY OF ORGANIZATION**

**Mission Statement**

*(Portrays the basic purpose of our organization, the groups of clients that it services and generally how it serves them.)*

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**Positioning Statement**

*(Portrays the unique role of our nonprofit and how it fills that role. The statement depicts how we want others to view our nonprofit. This statement is the essence of how we want the media, and others, to recognize our organization.)*

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**Script for Representing Our Nonprofit**

*(Portrays key points to make when representing our nonprofit to external groups.)*

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**Marketing and Promoting Our Organization**

What Are We Currently Doing to Market and Promote Our Organization?  
(consider, for example, annual meetings, brochures, news releases, interviews for the media, etc.)

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Are These Marketing and Promotions Activities as Effective as They Should Be?  
(usually it's hard to answer this question -- however, if you could be doing a lot better, that will be obvious)

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Additional Comments

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*(Actions in this area should be worded as specific goals and organized into the section "Goals, Responsibilities ..." later in this plan.)*

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**GUIDELINES FOR MANAGING RELATIONSHIPS WITH THE MEDIA**

**Procedure for Managing Media Contacts**

The following procedure will be used for all calls from and to reporters, or other contacts with the media, including, for example: newspapers, magazines, television, radio, etc.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Preferred Media and Contacts**

The following media and contacts are preferred when promoting our organization. These media (newspapers, television, radio, etc.) and contacts have been used in the past, understand our organization and our marketplace, etc.

1. Media \_\_\_\_\_ Contact: \_\_\_\_\_

Comments \_\_\_\_\_

2. Media \_\_\_\_\_ Contact: \_\_\_\_\_

Comments \_\_\_\_\_

3. Media \_\_\_\_\_ Contact: \_\_\_\_\_

Comments \_\_\_\_\_

4. Media \_\_\_\_\_ Contact: \_\_\_\_\_

Comments \_\_\_\_\_

4. Media \_\_\_\_\_ Contact: \_\_\_\_\_

Comments \_\_\_\_\_

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**MARKETING AND PROMOTING: [INSERT NAME OF PRODUCT/SERVICE]**  
(Complete this section of the plan for each product or service.)

**Product Description, Including Features and Benefits**

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**Preferred Target Markets (specific groups of clients for product/service)**

Top-Ranked Target Market Group	Primary Benefits of Our Product/Service to Them	Estimated Number of Clients to Get
Second-Ranked Target Market Group	Primary Benefits of Our Product/Service to Them	Estimated Number of Clients to Get
Other Target Market Group	Primary Benefits of Our Product/Service to Them	Estimated Number of Clients to Get

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Additional Thoughts \_\_\_\_\_

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*(Actions in this area should be worded as specific goals and organized into the section "Goals, Responsibilities ..." later in this plan.)*

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### **Competitor Analysis**

Name of Competitor's Organization \_\_\_\_\_

Name of Their Product/Service \_\_\_\_\_

Common Market(s) That We Serve \_\_\_\_\_

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Benefits of Their Product/Service \_\_\_\_\_

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Pricing of Their Product/Service \_\_\_\_\_

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Strengths and Weaknesses of Their Product/Service \_\_\_\_\_

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How Our Product/Service Compares to Theirs \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Resulting Actions We Should Take \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*(Actions in this area should be worded as specific goals and organized into the section "Goals, Responsibilities ..." later in this plan.)*

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### **Collaborator Analysis**

Name of Potential Collaborator's Organization \_\_\_\_\_

Name of Their Product/Service \_\_\_\_\_

Common Market(s) That We Serve \_\_\_\_\_

\_\_\_\_\_

Similarities Between Their Product/Service and Ours \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Advantages of Collaboration \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Disadvantages of Collaboration \_\_\_\_\_

\_\_\_\_\_

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Resulting Actions We Should Take \_\_\_\_\_

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## **Pricing**

What's the Current Fee for Clients to Use?

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How Much Is It Costing Us to Provide This Product/Service?

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Are We Recovering Our Costs (is the price enough to cover costs to produce and provide it)?

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Is the Current Fee Affordable to Clients?

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Is Our Pricing Competitive?

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Would Any Other Forms of Pricing Be Better?  
(for example, sliding-fee scale, deferred payments, installment payments, etc.)?

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Additional Comments \_\_\_\_\_

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**Promotion: Advertising**

(NOTE: The following table does not include cost of labor in costs of advertising This labor cost is typically not directly a marketing and promotions cost.)

Top-Ranked Target Market Group	Primary Benefits of Our Product/ Service to Them	Preferred Means of Advertising to Reach This Group	Estimated Costs for Advertising
Second-Ranked Target Market Group	Primary Benefits of Our Product/ Service to Them	Preferred Means of Advertising to Reach This Group	Estimated Costs for Advertising

Other Target Market Group	Primary Benefits of Our Product/ Service to Them	Preferred Means of Advertising to Reach This Group	Estimated Costs for Advertising

Additional Thoughts/Comments \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*(Actions in this area should be worded as specific goals and organized into the section "Goals, Responsibilities ..." later in this plan.)*

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**Promotion: Sales**

(NOTE: The following table does not include cost of labor in cost of sales. This labor cost is typically not directly a marketing and promotions costs.)

Top-Ranked Target Market Group	Best Methods for Generating Leads, Follow-Ups, Presentations and Closing Sales	Sales Goals (number of contracts and/or dollars in revenue; other units?)
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Second-Ranked Target Market Group	Best Methods for Generating Leads, Follow-Ups, Presentations and Closing Sales	Sales Goals (number of contracts and/or dollars in revenue; other units?)
Other Target Market Group	Best Methods for Generating Leads, Follow-Ups, Presentations and Closing Sales	Sales Goals (number of contracts and/or dollars in revenue; other units?)

Additional Thoughts/Comments \_\_\_\_\_

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*(Actions in this area should be worded as specific goals and organized into the section "Goals, Responsibilities ..." later in this plan.)*

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**Promotion: Customer Service**

How Do We Make Client Experiences as Pleasurable and Effective as Possible When Using Our Product/Service?

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What Feedback Are We Getting From Program Evaluation Activities  
(for example, what are clients indicating in conversations to staff, surveys, etc.?)

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What Should We Be Doing to Improve Customer Services?

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Additional Comments

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*(Actions in this area should be worded as specific goals and organized into the section "Goals, Responsibilities ..." later in this plan.)*

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**Production**

What Resources Are Needed Now to Continue to Build the Product/Service?  
(for example, staff time, training materials for clients, certain types of facilities, etc.)

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What Resources Will Be Needed in the Near Future (based on desired new markets,  
etc.)?

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Resulting Actions to Take

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*(Actions in this area should be worded as specific goals and organized into the section  
"Goals, Responsibilities ..." later in this plan.)*

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### **Distribution**

What Is the Best Means to Distribute Your Product/Service?  
(including the best way to bring your product/service together with the clients who use it)

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What Needs to Be Done to Improve Distribution?

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Resulting Actions to Take

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*(Actions in this area should be worded as specific goals and organized into the section "Goals, Responsibilities ..." later in this plan.)*

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## **GOALS, RESPONSIBILITIES, TIMELINES AND COMMENT/STATUS**

### **Planning and Administration**

This type of goal is in regard to improving and carrying out the marketing and promotions planning in our nonprofit, eg., developing a board marketing committee, improving marketing and promotions planning, getting assistance to planning, etc. Goals are specified, as much as possible, in terms that are measurable, eg., bringing in consultant, training courses, etc.

Goal	Responsibility	Completion Date	Comments/Status	Budget for Goal

### **Marketing and Promoting Overall Organization**

This type of goal is in regard to establishing and enhancing the positioning and identity of the organization, for example, hold special events, write articles, public announcements,

etc. Goals are specified, as much as possible, in terms that are measurable, eg., number of press releases, special events, etc.

Goal	Responsibility	Completion Date	Comments/Status	Budget for Goal

### **Marketing and Promoting Products and Services**

This type of goal is in regard to marketing and promoting all of the products and services, for example, reaching new markets, adjusting pricing, advertising specific products/services, etc.

Goal	Responsibility	Completion Date	Comments/Status	Budget for Goal

### **BUDGET FOR MARKETING AND PROMOTING THE OVERALL ORGANIZATION**

The following budget depicts planned expenditures for marketing and promoting the organization and its products/services over the next year.

*(The following is a sample budget and should be modified according to the needs and nature of your nonprofit organization.)*

Item	Planned	Actual
Annual meeting		
Trainer (for board committee, about marketing and promotions)		
Classified ads		
Annual report		
Brochures		
Postage and materials for direct mail		
Newsletters (one per month)		
Posters (6)		
4 program videos		

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