

BUILDING AN EFFECTIVE MARKETING PLAN WORKBOOK

go.ncsu.edu/LocalMarketingPlans

Marketing is an essential element of programmatic success. Marketing provides the opportunity to build awareness of Extension's programs and services; it also helps you to understand your customers' needs and serve information to them in a more impactful way. Thoughtful marketing strategies can help you to recognize what is working and where you need to make changes.

This document is an effort to take the uncertainty out of marketing planning. It offers step-by-step instructions in a "workshop" format. At the end of these exercises, your county center will have a marketing action plan targeting your customers' specific needs.

The final takeaway is a single-page marketing plan that will help you stay on track throughout the year and report strategic impacts for 2018.

We ask that county directors familiarize themselves with the worksheets and the marketing planning process. From there we recommend the following:

- County directors or chosen team member could lead two half-day sessions with your staff to fill out the worksheets (exercises could be completed during several staff meetings as well).
- Appointed individual fills out the one-page Marketing Plan, which is then used as a reference tool all year and turned in with the reporting resources at the appropriate time.
- Appointed individual will also track performance of tactics on a spreadsheet.

Marketing planning presents a unique opportunity for your Extension county center to define success. By starting from the highest level – the single goal that means the greatest impact for your center – then drilling down, you can identify the pathway that leads to success, and ultimately break that down into manageable, measurable steps.

Properly implemented marketing plans help you evaluate your tactics and give you the opportunity to make adjustments mid-course, so that everything you do to market your county center is focused and performing optimally.

Marketing planning is a team effort, but at the end of the day having one person responsible for steering the conversations and making final decisions is crucial. Below are a few tips to make the process smooth and painless.

Tip #1 – It may be helpful for the County Extension Director to determine the single business goal for the center prior to meeting with the planning team. Sharing the goal ahead of the meeting gives everyone time to gather thoughts and may make your meeting more productive.

Tip #2 – Plan at least a few hours of uninterrupted time to work through the big picture parts of the marketing plan with the team, then follow up with a second session to determine tactics and messaging. You might assign teams to tackle a tactics proposal for each marketing communications goal prior to your next meeting.

Tip #3 – Use this worksheet to guide discussions. After it is complete, one person should be responsible for distilling the marketing plan into a single page with simple language. The template included in this packet is recommended.

Tip #4 – Hang on to these worksheets, but treat the single-page document as your formal marketing plan. The document should be referenced frequently, particularly as you measure performance and report against your goals.



Setting Your Goals

There are three types of goals. **Business goals** are the overarching goals that will drive success for your county center. **Marketing goals** show how you will achieve the business goal, specifically. **Marketing Communications goals** tie to your campaign call-to-action and should be measurable through selected tactics. In the example below, all marketing tactics will drive traffic to program pages of the website.

Business Goal example: *In 2018, participation in Extension's Adams County Center programs will increase by 15%.*

Marketing Goal example: *In 2018, 50 new participants (individuals who have not participated in programming before) will attend FCS programs.*

Marketing Communications Goal example: *Website visits to FCS program pages will increase 5% each month through the end of 2018.*

Your Business Goal should support N.C. Cooperative Extension's mission to deliver education and technology that enriches the lives, land and economy of North Carolinians.

EXERCISE

Business Goal

What single, overarching goal means success for your county center in 2018?

Drive awareness of the N.C. Cooperative Extension brand in Urbana County.

Briefly state how this goal supports the brand promise:

Marketing Goals

What are two to three things your can center do to achieve that business goal?

1. Eliminate confusion as to Extension's role in an urban environment (not just for rural communities).
2. Increase awareness of our brand via schools and programs that work directly with children and their families.

Marketing Communications Goals

For each marketing goal, what is the primary action you need your audience to take in order to be successful? Can you quantify the result you expect?

For MG 1: Ensure N.C. Cooperative Extension branding is visible on at least 80% of public facing event promotional materials even when working through partners where our role is to "train the trainer."

For MG 1: Educate county policy makers and citizens as to the core service areas of Extension (Agriculture, Food & Nutrition, 4-H Youth Development) by connecting to and raising the visibility of local, urban programs.

For MG 2: Position Extension in Urbana County as a resource for the public schools – through guest speaker programs, club outreach and curriculum support – increasing the number of school-based encounters to no less than 20 total, and in no fewer than 40% of the elementary schools and no fewer than 50% of middle and high schools.



Defining Your Audience

Relative to your marketing goals, who are your key audiences? That is, who do you most need to reach to achieve your overall business goal? This exercise is about building a profile that will define how you market to them.

Things you might include: age, gender, job title, area(s) of responsibility, life stage, interests, geographic location (in town, suburban, etc.), habits, digital usage, etc.

Building customer personas may help you to better understand your target audiences. Learn more at go.ncsu.edu/PersonaTips.

Often, getting on the phone with local businesses will help you better understand your target audience. Go online to locate media kits for the local paper, TV station and radio stations. Talk to local internet and cell phone providers to see if they have data on your county. Visit census.gov and plug your county into the fact finder. And, of course, get googling!

EXERCISE

Who are your key audiences (list at least three)? Provide a brief description for each.

Are your audiences aware of Extension? How aware? How do they utilize Extension?

What are they doing instead of working with Extension? Competition could be things like talking to industry, consulting a book, watching YouTube, talking to friends or other farmers, etc.

Why should they connect with Extension? Think not only about what Extension is, but also what specifically your team offers in the way of expertise and programming.

One audience is defined here; remaining examples have been added at end of document:

Educators and School Officials -

Educators and school leaders are time-deprived individuals who want to make a difference in the lives of kids. They are plagued by decreasing resources and changing cultural norms that have negatively impacted everything from class behaviors to homelife situations that have a cause/effect relationship on education and learning. They are masters of doing something with nothing and welcome opportunities for classroom support of any kind.

This audience group skews female – 73%. Most are between the ages of 23 and 56. Around 55% are white, 35% are African-American and 8% are Hispanic. Many educators can be found on Pinterest, Facebook and Twitter. The public schools operate a listserv that reaches all teachers and can be broken out into elementary, middle, etc., as well as by individual schools.

PTAs offer a lot of support to schools, often running clubs and engaging in fundraising support, particularly in elementary schools. In high schools, booster clubs may serve a similar purpose. PTA parents tend to be female and middle to upper income. Educators tend to be well versed in current events and local school board politics.



Mini S.W.O.T. Analysis

S.W.O.T. stands for Strengths, Weaknesses, Opportunities and Threats. A S.W.O.T. analysis is best conducted by a team of individuals who represent all program areas and facets of Extension in your county.

Strengths and Weaknesses are internal to your organization (specifically related to your county operation). Opportunities and Threats are external – they could come from Extension at the state or local level, from the county, from things happening in your communities, from other organizations or groups, and more.

Examples:

Strengths

- Key staff positions filled
- Motivated, educated team
- Outreach initiatives thriving
- High awareness of ag services
- Online registration available

Weaknesses

- Declining volunteer base
- Interpersonal challenges with staff
- Low event/program attendance
- Aging building
- Lack of XYZ expertise

Opportunities

- We Grow N.C. campaign
- Growth in local farm-to-fork movement
- Partnerships with local organizations
- Thriving downtown revitalization initiative
- Increase in cell phone use in county

Threats

- Declining county funding/resources
- Development of former farmland
- Competitor innovation
- Information consumption and comm. trends
- Cell phone/internet coverage in county

Walk your team through the exercise on the next page to brainstorm all Strengths, Weaknesses, Opportunities and Threats. Record everything at first; you can always refine later. Your list will be longer than the example above.

EXERCISE	
<p><i>Strengths</i></p> <ul style="list-style-type: none"> • Relationships with county • Strong MGV program with high number of volunteers • Recent growth in 4-H enrollment • Facebook, Twitter, Pinterest accounts active • Staff prof. development/public speaking • Strong connections to local non-profits • Partnership with public health dept. • New urban farm program growth 	<p><i>Opportunities</i></p> <ul style="list-style-type: none"> • Public schools volunteer/mentor program • New county commissioner is a 4-H'er • 3 new farmers markets in suburban areas • Extend training in social media through agreement with Urbana Community College • Approval to hire new Ag agent
<p><i>Weaknesses</i></p> <ul style="list-style-type: none"> • Need Ag agent • Shared FCS agent • No plan for county fund solicitation • Test/Demo kitchen needs updating • Limited funding for new marketing resources (branding) • No content strategy for social media 	<p><i>Threats</i></p> <ul style="list-style-type: none"> • Closure of farm for equine programs • Budget cuts at the county level • YouTube, etc. easy ways to find gardening advice • No time to be proactive – have to be reactionary due to differing priorities between county, university, key partners, etc.



Determine Marketing Assets

Understanding what resources already exist and can be leveraged is key to marketing success. That said, your primary marketing channels should connect with your target audiences as best as possible. Awareness of external “paid” assets is also important.

Review the list below and add any additional assets that may be unique to your county, based on partnerships and relationships. You may wish to cross out assets that do not apply to your situation.

As you inventory assets, be sure branding is up-to-date and make note of the quantity on hand.

Visit the brand site for guidance: go.ncsu.edu/NCCE-Brand

Channel	Considerations	Advantages	Evaluation	Cost
Email	What lists do you have? Are they up-to-date? Can you partner with other groups to utilize their lists? Is purchasing a list an option (e.g. newspaper subscriber lists, other paid lists)?	Easy to segment. Easy to follow up. With some email systems you have options like push-to-open.	Analytics are readily available. Track interests down to the person.	Very low cost unless you are purchasing a list.
Online Marketing	Do you want to drive traffic to your website or an online event registration page?	DIY campaign building with social and pay-per-click. Easy to identify audiences with demo, geo and interest targeting.	Works well with Google Analytics.	Low to moderate, but easily controlled with pre-set budgets.
Social Media	Does your audience use social? Which sites? What platforms are available? Do you have staff to commit to social?	Relationship building. Event interest and registration.	Easy to track	Low, but time consuming.
Content Marketing	What resources are already available that you can repurpose? Do you enjoy creating original content?	A natural fit for Extension.	Serve content online and track link clicks.	No cost, but time consuming.
PR	Do you have a relationship with media? Is the media supportive of Extension in your county? Are you trying to raise awareness or educate?	Third-party, objective coverage is more credible. Strong reach.	Harder to track unless you count media mentions or article size. May impact web traffic positively.	No cost for unless events and materials are needed. Some event materials available on loan from Extension.
Events	Is the event well attended by your audience? Are there highly visible opportunities for a presence?	Face-to-face contact; opportunity to give something meaningful away	On-site data collection (sign-ups, booth traffic, etc.).	High. Event materials and promos (some available on loan from Extension). Signage.
Advertising	Will the right people see your ad? Where/how do your key audiences	In rural counties, traditional	Monitor source traffic to website.	High. Costs vary.

	consume info (specific websites, social, publications, etc.)?	media still has merit. In urban counties, more options exist.	Re-targeting opportunities with digital ads.	
Direct Mail; Fliers	Do you have a mailing list? Can you buy one? Is there a place to hand out fliers (and do you have permission)?	Local mail may get more attention than unfamiliar/junk mail.	Harder to track unless you utilize a dedicated email response address.	Low to moderate.
Sponsorship/ Partnership	Can you co-sponsor a popular event? Are partners willing to allow you a presence at their events?	Local charities and sports teams may lend you some goodwill in the community	Hard to track	Varies.
COUNTY-specific Tactic Weekly Radio Interview with DJ Ralph (WKMI)			Radio station has listener metrics	Free; only one agent's time to record segment and research beforehand
COUNTY-specific Tactic				

Now, consider your **target audience(s)**. Which of the above tactics is most likely to be used by your targets considering the profiles you built earlier?

For each marketing communications goal, choose 3-4 tactics from your assets list that best reach your audience.



Determine Your Budget

Assigning UTM parameters to your links allows you to track the success of individual campaign tactics. Learn more at go.ncsu.edu/UTMinfo.

You likely had an idea of your budget prior to starting this exercise. Regardless of how large or small the budget, it is important to commit to it, plan to it, optimize against it, and carefully track it. Showing high returns on a small investment is a great story to tell!

Do you have the time and/or money to utilize these channels? Are all tactics aligned with your overall marketing and business goals? Once you have your tactical list, record it below.

EXERCISE

Marketing Communications Goal #1: Ensure N.C. Cooperative Extension branding is visible on at least 80% of public facing event promotional materials even when working through partners where our role is to “train the trainer.”

Primary Target Audience: Non-profit decision makers, public health leaders, religious leaders and community influencers

1. Alter the current Memorandum of Agreement to include a clause about using the N.C. Cooperative Extension logo on all partner marketing materials. Also require verbal recognition in speaking engagements. **CTA = Partner with us**

2. Create a partner toolkit that includes your county center logo and key programs like Extension Master Gardener or 4-H. Should also include a basic brochure that gives general information about Extension in Urbana County. **CTA = Download our materials**

3. Use partner listserv to inform partners of Extension’s brand recognition challenge and our new requirements, and request their assistance. Include PDF of brochure.
CTA = Download our PDF

4. Mid-year, send thank you note via your contact list and remind partners to continue giving a nod to N.C. Cooperative Extension for all events and programs that we collaborate on.
CTA = Subscribe to our email(s); Partner with us

Marketing Communications Goal #2: Educate county policy makers and citizens as to the three-fold mission of Extension (Agriculture, Food & Nutrition, Youth Development) by connecting to and raising the visibility of local, urban programs.

Primary Target Audience: Citizens of Urbana County; Policy makers

1. Celebrate N.C. Cooperative Extension at the local library. Designate “Extension Month” working with the library. Photo display boards will show fun events and general informational brochures for Extension and key programs like 4-H and volunteer opportunities. Volunteers can talk to the public about how they are involved with Extension. Extension poster competition allows one youth to win a discount to 4-H camp (share via social – online voting). Opportunity to grow email database. **CTA = Subscribe to our email list(s); Enter your poster design; Vote for your favorite**

2. Winning poster (see above) will be printed and shared with partners to display in their offices, including all area public schools. (cost of printing 150 posters: approx. \$400).
CTA = Display a winning poster

3. Offer a courtesy course as team building exercise for county commissioners. “Cooking with Comms” might teach food safety/hurricane preparedness to county commissioners and influencers. Strive for 60% participation from the commissioners. Use as opportunity to instruct on the full role of Extension in Urbana County. **CTA = Enroll**

4. Pitch “How well do you know Extension?” weekly feature to Urbana Times newspaper. Each week and agent will address a user submitted question. At first, the questions can be submitted by “friends” and speak to the role of Extension in urban communities. Later, questions can be submitted directly from readers through a published email or through social.

Marketing Communications Goal #3: Position Extension’s Urbana County Center as a resource for public schools – through guest speaker programs, club outreach and curriculum support – increasing the number of school-based encounters to no less than 20 in total, and in no fewer than 40% of elementary schools and no fewer than 50% of middle and high schools.

Primary Target Audience: Educators and School Officials

1. Create a list of Expert Resources for STEM and for “Specials” courses offered through the public schools. List delivers contact information and specialty area, potential lesson topics that the agent can speak to, and age groups that the material may be appropriate for. Example: fifth graders study storm water. Our area agent’s information can be given with the following description, “John Smith can walk students around the school campus and show how storm water on campus runs off into the water system. He can help identify potential pollutants on campus and work with students to devise plans to reduce or eliminate storm water pollution on campus.” List goes out to every school. CTA/Request a guest lecturer

2. Reach out to all PTA presidents to deliver the above information, but tailor it to suit clubs. For example, many schools have gardening clubs and some may have agricultural clubs. Others may have clubs for sewing, cooking, babysitting, or family life. CTA/Request a club speaker

3. Partner with a school and local businesses near the school to send a cherry tomato plant kit home with every child this summer. Students can plant it in class with a lesson on plants/gardening. The kids will learn the science AND have a source of a healthy vegetable all summer long. CTA/Sponsor a class/Request kits and guest lesson

4. Work with local high school athletics and booster clubs to sponsor an “Ag Night” at the high school football or basketball game. Extension themed half time events can be offered for many age groups. Prizes can include free programs or, working with business partners, coupons and gift cards to local businesses. CTA/Parents fill out a participation form to enter half time events.



Determine Calls to Action

To gauge the effectiveness of a tactic, a specific, relevant call-to-action (CTA) must be properly displayed. CTAs need to be appropriate to their channel and should drive the overall marketing communications goal.

Examples: “Subscribe to our newsletter” or “Visit our website to learn more.”



Determine Metrics

How effective are your tactics? Plan a schedule for tracking results – weekly? Bi-weekly? After every email? Determine what data shows success or failure and collect that data.

At some point you may choose to change tactics or to adjust your CTA to optimize your campaign. Optimization can include small tweaks like changing the language in an ad or email, swapping out an image to show something more appealing, changing the landing page, or even dropping a tactic and reallocating resources to a more effective tactic.



Integrate

Make sure your messaging is consistent across all marketing materials through use of a common look and feel, adherence to brand standards, a common language, tone and theme. Your tactics should also be integrated – ads should drive to the website, content links should be visible, social media should incorporate appropriate links, etc. Even your print and collateral should support and be supported by other tactics when it makes sense.

Strategic Messaging Framework

CALS launched a media campaign this spring that will run for six months (approx. April – October 2018). The theme of the campaign is “**We Grow NC**” (cals.ncsu.edu/We-Grow-NC). A series of television, radio and digital ads will demonstrate the ways that NC State works to improve the economy, opportunities and student access for North Carolinians, while also providing solutions to address the challenges that local communities face.

As the boots-on-the-ground delivery mechanism for much of what NC State and CALS offers, as well as N.C. A&T, Extension invites county centers to participate in and take advantage of the We Grow N.C. messaging framework as you speak to your local audiences. Doing so can tie your programs directly to the broader media messaging, bolstering your outreach around local efforts.

The We Grow N.C. campaign is built around five strategic themes that Extension supports across the state. Those five themes are: We Grow Opportunities; We Grow Solutions; We Grow Communities; We Grow Economies; and We Grow Talent.

Everything that Extension does can be categorized into one or more of these themes. How are your county center’s programs working to grow your county? Often, the major theme areas can be too broad for a specific message, but the We Grow framework allows you to create your own supporting message that directly relates to your program.

For example, how are you growing communities? Perhaps your FCS agent is offering a healthy cooking program like Med Instead of Meds. To promote this program, you might consider messaging like, “Extension in County Name is growing healthy citizens.” A possible headline could simply be, “We Grow Healthy Citizens.”

Similarly, a key ag program or workshop likely supports the local economy by helping farmers be more profitable. In that case, “We Grow Economies” is an appropriate theme. Messaging to promote your workshop could be, “We Grow Farm Profits” or “We Grow Higher Yields.”

Get creative – what you and your team do every day is growing this state and your county – it’s time to start talking about it! Need help coming up with the We Grow language?

Contact

Contact Justin Moore or Julie Hayworth-Perman, with NC State Extension Communications, at tjmoore3@ncsu.edu or jhaywor@ncsu.edu, respectively.

Additional Target Audience Examples (from “Defining Your Audience” section)

Non-profit decision makers, public health leaders, religious leaders and community influencers

These individuals are highly visible through their respective organizations. In many cases they serve as primary fundraisers and community educators. Many of this audience are women (about 75%) with numerous racial and ethnic groups represented. Approximate age is 33 to 60. These are well educated, well connected individuals.

According to county records, Verizon is the primary cellular service provider in the area, and most county households have at least 2 smartphones. The most popular website in the county outside of search engines is WXYZ television – note that this station highlights non-profits and community service organizations in a special weekly feature. Research also shows that among these demographics, Twitter, Facebook and You Tube are popular. An annual non-profit awards luncheon (sponsored by XYZ bank and held in November) is a gathering place for these individuals.

Awareness of Extension among non-profits that deal with economic concerns (e.g. food access, education, etc.) and public health decision makers is high. Extension in Urbana County has a strong relationship with religious leaders in many of the influential religious centers and churches. This is probably our most well-versed audience in terms of programs and impacts.

This group should utilize Extension’s expertise in providing educational materials and other resources to extend their reach into the community.

County commissioners, mayors, other elected officials and influencers

County commissioners, mayors, other elected officials and influencers – these are highly visible, highly involved people who wield a lot of influence. They have little time due to a large number of engagements and need to prioritize their involvement in order to attend to a large population of constituents. Most of these individuals are male and between the ages of 42 and 65 (around 60%); about half are white, with most of the remaining audience being African-American or mixed race. They tend to be upper-middle class to wealthy.

According to county records, Verizon is the primary cellular service provider in the area, and most county households have at least two smartphones. The most popular website in the county outside of search engines is WXYZ television. Research also shows that among these demographics, Twitter and You Tube are popular. Events attended by these individuals include the County Administration Lunch and the local bank shareholder association meeting, as well as all scheduled meetings of the county commission and local school board.

This audience is aware of Extension, but may not fully understand all that we do. Some may only see us as a cost on their budget, without always seeing our impact in the community.

They should connect with Extension as a way to better understand the county’s needs related to food production, health and nutrition, and as a way to connect with our youth. They need to see Extension as a tool in their toolbox – a way to help them grow the county and reach local goals.

Public School Students

Students age 5-18 enrolled in the Urbana County Public School District, with emphasis on our schools with high free and reduced lunch populations. According to the school system, our

schools are comprised of 43% white students, 24% African-American students, 12% Hispanic, 7% multi-racial, 7% Asian-American, 3% Indian subcontinent, 2% Native American, and 2% unidentified.

Due to county policies, we do not “market” directly to students; rather, we reach students through school leadership, educators and parent volunteers.

Public Health records for Urbana County suggest that a full 21% of our county youth (age 3 to 18) are obese, with 43% being either overweight or obese. On average, 32% of our enrolled public school students are at or near the poverty line, with 42% receiving free or reduced lunch.