

## **BUILDING AN EFFECTIVE MARKETING PLAN WORKBOOK**

[go.ncsu.edu/LocalMarketingPlans](http://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?*

Encourage greater community involvement in programs both online and in-person.

*Briefly state how this goal supports the brand promise:*

By getting more individuals actively involved with Extension, we are enriching lives. Key program areas represented also enrich the land. Economies thrive when people are healthier, when farmers and businesses are successful, and when the foundation is laid for an educated future workforce.

### **Marketing Goals**

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

1. Raise awareness of Extension's services among small farmers and new agribusinesses.
2. Increase participation in FCS and horticultural programming.
3. Increase enrollment in 4-H and lay the groundwork for a new club in the southeastern part of the county.

### **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:** Create educational, training and networking opportunities specifically targeting small agribusiness entrepreneurs and small farmers.

**For MG 2:** Extend registration opportunities for FCS and horticulture classes – create more opportunities to learn about and register for these programs.

**For MG 2:** Develop partnership opportunities with at least two large churches – consider how Extension can support church community outreach, congregant health and youth development opportunities.

**For MG 3:** Work with at least four local elementary schools to incorporate 4-H curriculum and Extension staff into lesson planning with an emphasis on experiential learning opportunities.

**For MG 3:** Outreach to school PTAs with 4-H information and Extension resources.



## 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 and so forth.

*Building customer personas may help you to better understand your target audiences. Learn more at [go.ncsu.edu/PersonaTips](http://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](http://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.)

*NOTE: One sample audience is defined here; [other examples available](#) 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 – 82%. Most are between the ages of 28 and 62. Around 75% are white, 15% are African-American and 10% 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:

<i>INTERNAL</i>	<i>EXTERNAL</i>
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>● Key staff positions filled</li> <li>● Motivated, educated team</li> <li>● Outreach initiatives thriving</li> <li>● High awareness of ag services</li> <li>● Online registration available</li> </ul>	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>● We Grow N.C. campaign</li> <li>● Growth in local farm-to-fork movement</li> <li>● Partnerships with local organizations</li> <li>● Thriving downtown revitalization initiative</li> <li>● Increase in cell phone use in county</li> </ul>
<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>● Declining volunteer base</li> <li>● Interpersonal challenges with staff</li> <li>● Low event/program attendance</li> <li>● Aging building</li> <li>● Lack of XYZ expertise</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>● Declining county funding/resources</li> <li>● Development of former farmland</li> <li>● Competitor innovation</li> <li>● Information consumption and comm. trends</li> <li>● Cell phone/Internet coverage in county</li> </ul>

- 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

<i>INTERNAL</i>	<i>EXTERNAL</i>
<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>● Relationships with county</li> <li>● High awareness of horticulture programs</li> <li>● Facebook, Twitter accounts active</li> <li>● Video capability</li> <li>● New Extension building</li> <li>● Partnership with public health dept.</li> <li>● Farmers market now has signage</li> <li>● Ag fair has a regional draw</li> </ul>	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>● Interest in 4-H club in SE part of county</li> <li>● New county commissioner is a 4-H'er</li> <li>● Downtown revitalization is drawing a younger, more diverse crowd</li> <li>● Community college expanding ag programming</li> </ul>
<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>● Shared FCS agent</li> <li>● Limited funding for new marketing resources (branding)</li> <li>● No content strategy for social media</li> <li>● Aging volunteer base</li> <li>● No growth in budget for 3 years</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>● Declining county population</li> <li>● Fluctuating budgets from county and university</li> <li>● YouTube, etc. easy ways to find gardening advice</li> <li>● No time to be proactive – have to be reactionary due to lack of clarity around priorities</li> </ul>



### Determine Marketing Assets

Understanding what resources already exist and can be leveraged is another key to marketing success. 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](http://go.ncsu.edu/NCCE-Brand)*

<b>Channel</b>	<b>Considerations</b>	<b>Advantages</b>	<b>Evaluation</b>	<b>Cost</b>
<b>Email</b>	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.
<b>Online Marketing</b>	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.
<b>Social Media</b>	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.
<b>Content Marketing</b>	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.
<b>PR</b>	Do you have a relationship with media? Is the media supportive of Extension in your county? Are you trying to raise awareness or educate?	Objective, third-party coverage is more credible.  Strong reach.	Harder to track unless you count media mentions or article size.  May impact web traffic positively.	No cost, unless events and materials are needed.  Materials available from state comm team
<b>Events</b>	Is the event well attended by your audience? Are there opportunities for highly	Face-to-face contact; opportunity to give away	On-site data collection (sign-ups, booth traffic,	High. Event materials, displays and promos

	visible presence?	something meaningful.	etc.).	(some available from state comm team).
<b>Advertising</b>	Will the right people see your ad? Where/how do your key audiences consume info (specific websites, social, publications)?	In rural counties, traditional media still has merit. In urban counties, more options exist.	Monitor source traffic to website. Re-targeting opportunities with digital ads.	High. Costs vary.
<b>Direct Mail; Fliers</b>	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 use a dedicated email response address.	Low to moderate.
<b>Sponsorship/ Partnership</b>	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 some goodwill in the community.	Hard to track.	Varies.
<b>COUNTY-specific Tactic</b>  <b>Weekly Radio Interview with DJ Ralph (WKMI)</b>		A recurring program builds awareness of Extension and helps build expertise of staff.	Radio station has listener metrics.	Free; only one agent's time to record segment and research beforehand.
<b>COUNTY-specific Tactic</b>				

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.

*Assigning UTM parameters to your links allows you to track the success of individual campaign tactics. Learn more at [go.ncsu.edu/UTMinfo](http://go.ncsu.edu/UTMinfo).*



## Determine Your Budget

You likely had an idea of your budget prior to starting this exercise. Regardless of how large or small the budget, it's 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:** Create educational, training and networking opportunities specifically targeting small agribusiness entrepreneurs and small farmers.

Primary Target Audience: Chamber of Commerce staff, Farm Bureau and other business organizations

1. Identify and develop curriculum specifically for these small businesses. Work with the target audience to promote these trainings through existing email databases.

**CTA = Register Now**

2. Partner with the Chamber and the Farm Bureau to begin a quarterly networking event that brings together our small business owners with suppliers and potential partners and customers. **CTA = Partner with Us / Register Now**

**Marketing Communications Goal #2:** Extend registration opportunities for FCS and horticulture classes – create more opportunities to learn about and register for these programs.

Primary Target Audience: Citizens of Adams County

1. Identify and contract with a vendor to develop a registration widget. Share the widget with partner organizations such as churches, community groups and county government organizations for placement on websites and social properties. Share widget through Extension social channels. **CTA = Partner with Us / Register Now (Budget: \$1,200)**

2. Partner with county libraries to place tabletop signage near computers. Signs will promote all Extension programs with the URL for registration.

**CTA = Learn More and Register (Budget: \$200)**

**Marketing Communications Goal #3:** Develop partnership opportunities with at least two large churches – consider how Extension can support church community outreach, congregant health and youth development opportunities.

Primary Target Audience: Religious leaders and community influencers

1. Reach out to local pastors and community group leaders using existing databases (updated) to pitch health and wellness programs offered through the church.

**CTA: Partner with Us**

2. Identify largest African-American and Hispanic churches (minorities with higher risk of certain chronic illnesses). Set up a time for FCS agent and CED to meet with the pastor. Invite pastors to attend an appropriate course (or to send a delegate) at no charge.

**CTA: Partner with Us**

3. Develop a series of church newsletter articles tackling three (or more) key health concerns – chronic disease prevention, eating healthy for less, simple changes for cooking healthier meals. Send articles as follow up to the outreach program described earlier. **CTA: Learn More**

**Marketing Communications Goal #4:** Work with at least four local elementary schools to incorporate 4-H curriculum and Extension staff into lesson planning with emphasis on experiential learning opportunities.

Primary Target Audience: Educators and school officials

1. Create a list of expert resources for STEM courses offered through the public elementary 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 elementary school.

**CTA: Request a guest lecturer**

2. Reach out to county level school administration. Request opportunities to either speak at professional development sessions or to provide articles or materials for other communications efforts to inform teachers about the resources Extension offers.

**CTA: Request a guest lecturer**

**Marketing Communications Goal #5:** Outreach to school PTAs with 4-H information and Extension resources.

Primary Target Audience: Educators and school officials

1. 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 ecology, sewing, cooking, babysitting or family life. **CTA: Request a club speaker**



## Determine Calls to Action

To gauge the effectiveness of a tactic, you must properly display a specific, relevant call-to-action (CTA). 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 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.

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## **Additional Target Audience Examples** (from "[Defining Your Audience](#)" section)

### **Religious leaders and community influencers**

These individuals are highly visible through their respective congregations and communities. In many cases, they serve as everything from spiritual guide to life coach, healthcare advocate, social support resource and more. Many of this audience are women (about 75%), with numerous racial and ethnic groups represented. Approximate age is 40 to 60. Education levels vary widely, but these individuals are smart, culturally savvy and have a knack for understanding social systems and government.

According to county records, Verizon is the primary cellular service provider in the area, and most county households have at least one smartphone. Mobile is the primary way county residents connect online. The most popular website in the county outside of search engines is WXYZ-TV – note that this station highlights non-profits and community service organizations in a special weekly feature.

Awareness of Extension among these groups is high, though they may not think of us as a resource for wellness. Rather, they tap into us for support with initiatives such as food access and horticulture. This group should utilize Extension's expertise in providing educational materials and other resources to extend their reach into the community.

### **Chamber of Commerce staff, Farm Bureau and other business organizations**

These individuals tend to be politically active at some level and highly involved in local business and agriculture. Executives at these organizations wield a lot of influence. 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 middle- to upper-middle class.

According to county records, Verizon is the primary cellular service provider in the area, and most county households have at least one smartphone. Mobile is the primary way county residents connect online. The most popular website in the county outside of search engines is WXYZ-TV. Many of these individuals are active on Twitter, primarily through sharing content relevant to their work.

This audience is aware of Extension, but may not fully understand all that we do. They need to see Extension as a tool in their toolbox – a way to help them grow the county and reach local goals.