

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 annual impacts.

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.



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 examples above.

EXERCISE	
<i>Strengths</i> <ul style="list-style-type: none">•	<i>Opportunities</i> <ul style="list-style-type: none">•
<i>Weaknesses</i> <ul style="list-style-type: none">•	<i>Threats</i> <ul style="list-style-type: none">•



Setting Your Goals

There are three types of goals:

1. **Business goals** are the overarching goals that will drive success for your county center.
2. **Marketing goals** show how you will achieve the business goal, specifically.
3. **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 202X, participation in Extension’s Adams County Center programs will increase by 15%.*

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

Marketing Goal example: *In 202X, 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 202X.*

EXERCISE

Business Goal

What single, overarching goal means success for your county center in 202X?

Briefly state how this goal supports the brand promise:

Marketing Goals

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

1.

2.

3.

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:

For MG 2:

For MG 3:



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.



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.

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

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.

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	Third-party, objective coverage is	Harder to track unless you count	No cost for unless events and

	of Extension in your county? Are you trying to raise awareness or educate?	more credible. Strong reach.	media mentions or article size. May impact web traffic positively.	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 consume info (specific websites, social, publications, etc.)?	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.
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				
COUNTY-specific Tactic				

Now, consider your **target audience(s)**. Which of the above tactics is most likely to engage 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.



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 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 (add more goals as appropriate)

Marketing Communications Goal #1

Primary Target Audience:

Tactics:

1.

2.

3.

Marketing Communications Goal #2

Primary Target Audience:

Tactics:

1.

2.

3.

Marketing Communications Goal #3

Primary Target Audience:

Tactics:

1.

2.

3.



Determine Calls to Action

To gauge the effectiveness of a tactic, a specific, measurable call-to-action (CTA) must be displayed. CTAs need to be appropriate to their channel and should drive the overall marketing communications goal. In short, what do you need the audience to do?

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: Monthly? 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 email, swapping out an image to show something more appealing, changing a webpage, or even dropping a tactic and reallocating resources to something new.



Integrate

Make sure your messaging is cohesive across all marketing materials through use of a consistent look and feel, adherence to brand standards, and a common language, tone and theme. Your tactics should also be integrated – ads should drive to the website, web 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 has launched a messaging campaign - the theme is “**We Grow NC**” (cals.ncsu.edu/We-Grow-NC). At the onset, a series of TV, radio and digital ads demonstrated the ways that NC State works to improve the economy, opportunities and student access for North Carolinians, while providing solutions to the challenges of local communities.

As the boots-on-the-ground interface for much of what NC State and CALS offers, as well as N.C. A&T, Extension encourages county centers to take advantage of the We Grow NC messaging as you speak to your local audiences. Doing so can tie your programs directly to the broader college messaging, creating cohesion while bolstering your local outreach.

The We Grow NC campaign is built on four strategic themes that Extension supports statewide:

- **We Grow Economies**
- **We Grow Opportunities**
- **We Grow Solutions**
- **We Grow Access**

Everything that Extension does can be categorized into one or more of these themes. How are your centers’ programs working to grow your county? 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, 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, “Extension Grows 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!

Contact

Need help coming up with the We Grow language or other aspects of marketing planning?

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

Visit go.ncsu.edu/LocalMarketingPlans to find more resources on Building an Effective Marketing Plan for your county center and local programs. We will update the site as we develop additional resources to support your efforts.