



Guide to the Nonprofit Communications Strategic Planning Card Deck

Nonprofit Marketing Guide created this card deck to help you:

- **Explore your options** amongst the most likely goals, strategies, objectives and tactics for your nonprofit communications strategy
- **Prioritize your choices**, because strategic planning is about saying “No” to more things than you say “Yes” too. A visual aid like a card deck makes visualizing Yes and No easier.
- **Outline your strategy**. After visually outlining your strategy with the cards, you will need to add the specifics. Each card represents a concept or category of work, but you must customize that for your organizations by adding references to specific programs and services, target audiences, messaging and calls to action, etc.

The Individual Cards: Goals, Strategies, Objectives, and Tactics for Nonprofit Communicators

You will often see the terms *Goals*, *Strategies*, *Objectives*, and *Tactics* used interchangeably, but they mean very different things. Here are the definitions we use:

Goals are the broad primary marketing outcomes that support your organization's larger mission-oriented goals.

Strategies are the marketing approaches you take to reach your goals.

Objectives are the SMART steps you take to achieve a strategy, and we define SMART as Specific, Measurable, Achievable, Resourced, and Time-Bound.

Tactics are the tools you use to pursue the objectives associated with your strategy. Tactics include both communications channels like email, PR and social media, as well as specific types of content like storytelling or infographics.

Below are the 12 goals, 12 strategies, 12 objectives, and 28 tactics most frequently used by nonprofits.

Each of these is represented on card in the deck. You will also find blank cards in the deck that you can add or customize as you wish.

12 COMMUNICATIONS GOALS

Community Engagement and Education Goals

- **Engaging our community** to keep people inspired by and active in our work
- **Raising awareness of our issues** to educate people on our cause
- **Advocating on our issues** to change hearts and minds

Brand and Leadership Goals

- **Brand building and reputation management** for the organization
- **Positioning our staff as thought leaders** or experts
- **Communicating internally** with our staff or board

Program Recruitment Goals

- **Recruiting and engaging participants** to use our programs or services
- **Building our membership** by recruiting and serving members of our organization
- **Recruiting and engaging volunteers** to help deliver our programs and services

Fundraising Goals

- **Supporting fundraising from individuals** making small to medium gifts
- **Supporting major donor fundraising**
- **Supporting event fundraising** (galas, walks, etc.)

12 COMMUNICATIONS STRATEGIES

To customize strategies for your organization, you will often need to add a reference to the *who* (specific groups of your participants, supporters, or influencers) and the *what* (your messaging and calls to action to that group of people).

PERMISSION-BASED MARKETING is sharing content with specific people who have signed up, subscribed, or otherwise agreed in advance to join your mailing lists and lists of social followers. Nearly all nonprofits use this strategy in some way by building opt-in mailing lists.

UNSOLICITED DIRECT RESPONSE MARKETING is using mail, email, phone calls, and other communications tactics to communicate directly with people who have not previously opted-in to communications with you. It usually includes direct calls to action sent to purchased/rented lists of names. We most often see this strategy in play as direct mail acquisition fundraising.

GENERAL ADVERTISING is the placement of content into online, print, and broadcast channels meant to reach a targeted or general audience, rather than specific individuals. It can include everything from free flyers posted on bulletin boards to paid advertising in print and remarketing ads on social media. This is another popular strategy for nonprofits, especially via social media advertising.

CONTENT MARKETING is attracting people to your work and retaining their interest in it by creating and distributing content they find especially valuable and relevant. It's not about pushing your messaging on them, but rather drawing them to you because they find it so valuable.

EVENT or EXPERIENCE MARKETING is using events or other participatory experiences like tours, demos, or house parties to promote your programs and services. Attending the event is often an introductory step to further engagement with your programs or services. Sometimes it is hard to tell if nonprofits are marketing programmatic events or if the events themselves are the marketing, but generally speaking, if you are using events or other experiences to encourage people to take some other kind of action (not just attending the event), then you are probably doing Event Marketing.

Please note that Supporting Event Fundraising is a separate goal in this deck and shouldn't be confused with this strategy.

SEARCH MARKETING is gaining traffic and visibility from search engines through both search engine optimization of content and paid search listings. Rather than just throwing content up on your blog or website, are you paying attention to what topics bring traffic to your site and writing to encourage the right kind of traffic? Are you managing a Google Ad Grant? If yes, you are doing Search Marketing.

WORD OF MOUTH MARKETING is actively encouraging verbal or written testimonials or recommendations to be shared from one person to another. It relies heavily on casual, unplanned social interactions between people. It requires you to produce content or experiences that people will want to freely talk about with others.

INFLUENCER or AMBASSADOR MARKETING is creating relationships with people with special influence or access to a broader group of people you wish to reach. Influencers can include celebrities, bloggers, market leaders and anyone else who acts as a gatekeeper who decides whether to pass on your information to their communities. This strategy is especially important for nonprofits who are several steps removed from the people they are trying to affect in some way. A good example is an education think tank that wants to change how children

learn in the classroom. They need to influence the people who make the decisions about teaching.

PARTNER or ALLIANCE MARKETING is cooperating with other organizations to jointly promote your cause generally or your specific products or services. It can include referral marketing, affiliate marketing, co-branding, and cause marketing. Examples of Partner Marketing include several nonprofits collaborating on a one-stop-shop service center for clients, private sector businesses referring customers to nonprofits or collecting donations at the cash register, and museums in a geographic area buying advertising together.

PEER-to-PEER MARKETING is organizing and training volunteers to educate or advocate on your behalf. You work with individuals, but also support the community of peer educators or activists as a whole. Peer-to-Peer marketing is more organized and actively managed than Word of Mouth Marketing and involves many more people than Influencer Marketing. Peer-to-peer fundraising gets a lot of coverage in our sector, but fundraising isn't always the goal. Get Out the Vote operations by political campaigns are a good example of peer-to-peer marketing.

RELATIONSHIP MARKETING is creating strong, long-term, loyal relationships with specific individuals and focusing on the quality of those relationships, rather than on individual transactions with those individuals. While the individuals will take a variety of actions in support of your nonprofit over the course of the relationship, their overall engagement with your cause is paramount. Major donor fundraising programs are often built on relationship marketing strategies.

LOCATION-BASED MARKETING is using mobile phone location data to provide messaging to people when they are physically near specific locations or when they use apps to check-in at specific locations. Includes Geomarketing and Proximity Marketing. We most often see this used by nonprofits that run large public facilities like zoos and museums.

12 COMMUNICATIONS OBJECTIVES

As with the goals and strategies above, the following objectives are really categories of types of objectives that you'd need to customize for your nonprofit. We've provided a few examples to give you a sense of how the objective can be customized.

In addition to adding the quantitative *Measurable* and *Time-bound* elements specifically in the objective, you may also need to add some reference to the *who* — your participants, supporters, or influencers — and sometimes the *what* you are communicating about — your messaging or call to action.

JOINING, SUBSCRIBING, or FOLLOWING. Are your communications leading more people to join, subscribe or follow? Examples: Increase newsletter subscriptions by 20% this year. Optimize website form conversions over current levels.

EXPRESSIONS OF LOYALTY. Are your communications leading to retention or renewals? Examples: Maintain a 75% donor retention rate this year. Use lead scoring to keep 50% of our list moderately-highly engaged.

PARTICIPATION LEVELS. Are your communications increasing registrations, donations, RSVPs or other measures of participation? Examples: Sell out 90% of the workshops this year. Decrease the length of time between someone getting on a mailing list and then taking a specific action.

FINANCIAL GAINS OR SAVINGS. Are your communications leading to financial gains or savings? Examples: Increase the percentage of race revenue raised via peer-to-peer fundraising by 20%. Decrease our cost of acquisition for new donors.

LEVELS OF INFLUENCE. Are your communications increasing your influence with specific groups or increasing your share of the conversation on selected topics? Examples: Get invited to speak at 5 events this year. Improve site ranking on 15 keywords. Get coverage of our positions in 5 prominent trade journals. Over half of articles on a particular topic will mention our research on that topic.

INCREASED DEMAND OR DESIRE. Are your communications increasing requests, demands, or desire for something your nonprofit offers? Example: Increase appointment requests by 30% next quarter.

CHANGE IN KNOWLEDGE OR UNDERSTANDING. Are your communications changing knowledge or understanding among certain groups of people? Examples: 75% of beginners move to the intermediate level in 6 months. 500 people took a quiz and 75% passed. You could also track website metrics to topical pages, including impressions or clicks, new website or returning visitors, and length of time on site.

CHANGE IN TONE OR ATTITUDE. Are your communications changing the tone, sentiment, attitude or preferences that are expressed by certain groups of people? Examples: The majority of social media comments on our profiles are positive or neutral this year. The results of feedback surveys and public opinion polling could also work here.

INCREASED READINESS OR EMPOWERMENT. Are your communications helping certain groups of people be more ready or empowered to take an action soon? Examples: 70% of

petition signers continue to open emails six months later. What percentage of people move from awareness to action?

CHANGE IN BEHAVIOR. Are your communications leading to measurable changes in how certain people behave? Example: 50% fewer students use inappropriate language this semester.

INCREASED SATISFACTION. Are your communications making participants, supporters or influencers feel more satisfied? Examples: Raise our Net Promoter Score for the program to +60. Use the lead scoring system in our CRM to keep at least 35% of our list at 4-5 stars.

EXPRESSIONS OF TRUST. Are your communications leading certain groups of people to say or do things that demonstrate their trust in your organization? Examples: Three new organizations agree to partner with us on the new project. 100 people request assistance with an especially difficult challenge.

28 COMMUNICATIONS TACTICS

You will use a collection of tactics to implement a strategy and to achieve your objectives and ultimately your goals. We include both communications channels and some types of content in the definition of tactics.

- **Website.** It's your home base online. What information will people expect to find there and what will they want to do on your site? Consider how your website helps you implement your chosen strategies and how it can help you measure your objectives.
- **Blog.** Blogs are typically a part of your website. They can be everything from a "what's new" section to more substantive posts.
- **Single-topic email appeals, updates, and invitations.** These are emails that are meant to drive one specific action.
- **Email newsletters** with multiple articles. These emails are typically more FYI, but will often include multiple calls to action too.
- **Social media**, including Facebook, Instagram, Twitter, etc.
- **Direct mail** appeals, invitations and other updates that are printed and mailed and meant to drive a specific action.
- **Print newsletters** with multiple articles that are typically more FYI, but will often include multiple calls to action too. Print newsletters can be donor-centered, which means that the articles and stories provide abundant gratitude and emotional satisfaction to donors throughout the newsletter.
- **Mobile apps.** Software applications that run on mobile devices and are downloaded from the app stores. Don't confuse apps with your website or emails being mobile friendly. Apps are separate programs.

- **Instant messaging**, including private chat, texting, direct messaging through social media, and other forms of instant, private, online messaging.
- **Earned media and PR**, including press releases, press conferences, op-eds, and other forms of media relations.
- **Paid advertising**, including radio, TV, print, online, and outdoor.
- **Syndication and guest writing**, where you create content but publish it elsewhere.
- **Content curation and synthesis**, where you publish content created by others.
- **Video and audio**, including live streaming and previously recorded.
- **Graphics** and infographics used in a variety of communications channels.
- **Photography**, including original photography and stock photos.
- **Signage**, including posters and banners.
- **Storytelling**. This is a specific type of writing that can be used in several different communications channels. Used well, it's an extremely effective form of content for nonprofits.
- **Problem-solving tools**, including calculators and other interactive ways to help people make better decisions.
- **Downloads**, including case studies, how to guides and other helpful content.
- **Testimonials and referrals**, including posts on ratings and review sites and other forms of personal recommendations or endorsements. These act as social proof that can influence the opinions and behaviors of others.
- **Brochures, flyers, and other leave-behinds** including pamphlets, rack cards, and door hangers.
- **Displays and booths**, staffed and unstaffed.
- **Hosting gatherings**, meetings, and networking events.
- **Personal visits or phone calls** and other one-on-one meetings.
- **Presentations and public speaking** at events hosted by others.
- **Contests, gamification**, including competitions and other forms of competitive engagement.
- **Listening and data collection** and other ways of gathering feedback.