



Marketing Plan Template

Updated 2022

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Using This Template

This marketing plan template is designed to lay out the marketing efforts of a nonprofit organization in an upcoming period, usually a year. A marketing plan is not just about organization awareness but also should be designed for revenue-generating marketing campaigns. The plan will help reach these goals by deciding on its target audience (both donors and those you serve), how much funding needs to be invested in growing its donation funnel and strategically establishing a strong community presence.

Developing a marketing plan is often the first step in developing or implementing a marketing strategy. Marketing plans can be used for both small and large nonprofit organizations. These are typically created by a team of people from various departments within the leadership team.

The explanations, examples, and tools provided here will equip nonprofit leaders with explicit knowledge to effectively shepherd their organizations to measurable change through developing their marketing plan.

Organization Analysis

This section hopes to answer some basic questions. It will also set the stage for what you plan to accomplish. Make sure to answer the following questions:

- What are you hoping to achieve with your strategy and mission?
- Where is your organization currently in terms of marketing?
- Where do you want your organization in terms of marketing?

[Insert Organization Name] aims to achieve a 30% increase in sales by December 31, 2025. For this reason, the company will develop its marketing plan following its digital and direct marketing strategies.

Key Stakeholders

- Marketing Team
- Programs
 - Program Managers



Pro Tip

Understand who will be involved in the creation and sign-off for any project.

Action Plan

Goal

This section hopes to quantify your goals for each channel/project. This is an excellent place to begin structure how you measure success.

An example of a goal could be for marketing to help:

- Acquire 100 new donors or members in Q3.
- Increase social media community engagement by 10% by December 31st.
- Become a thought leader and go-to resource on an issue by posting blogs that reach 1000 new users.



Utilize the SMART method when putting together your goals and objectives.

S – Specific

M – Measurable

A – Achievable

R – Realistic

T – Timebound

We have a SMART article resource on the platform?
Use this to help guide you!

Did you know?

Marketing goals should be measurable, specific, and realistic for your business. Common marketing goals include:

- dollars raised
- followers gained/posts liked
- market share
- ROI on advertising expenditures
- brand awareness
- public relations placements
- community engagement

Ask yourself the following questions:

- Can you really and truly do this?
- Do the numbers, time frame, and dollars seem practical?
- Has my competition done similar things?

Target Audience

Describe your target audience. Nonprofits will tend to have more than one target market, and please describe each market.

Examples of General Target Audiences::

- Individual Donors
- Major Gift Donors
- Potential high-level funders
- Volunteers
- Members of the community that you serve.

Examples of Specific Target Audiences can include:

- Small-dollar donors who will give less than \$100.
- Local volunteers who live in the immediate community.
- Corporate leaders who determine sponsorship spending allocation.
- Women with children under 10 will leverage the XYZ program that our organization offers.

Important Questions:

- Who is currently participating in your services now or in the future?
- Is your market a specific segment of the population or the entire population in general?
- What are the size, location, and characteristics of your potential market?

Focus your marketing efforts on the individuals or organizations that are your best chance of donating, volunteering, or utilizing your services. The suggested length is one or two paragraphs for each target market.

Describe their general demographic characteristics, and paint a picture of your current customers.

- How old are they?
- Where do they live and work, and what is their income level?
- What other characteristics do they share? What are their lifestyles, interests, and beliefs?

Tactics and Channels

Channel strategy is all about selecting the marketing touchpoints that match your target audience's needs and habits. As you choose your channels (think Instagram, Twitter, Facebook or TikTok) be sure to analyze competitors' strategies, continually research your target audience, set and track goals for each channel, and follow each channel's own best practices.

To optimize your channel marketing strategy, you'll need to apply best practices for each channel you choose. Follow the links below to learn about best practices for some of the most popular marketing channels:

- **Email Marketing**
 - Mailchimp
 - Constant Contact
- **Social Media Marketing & Paid - Advertising**
 - Instagram
 - Twitter
 - Facebook
 - TikTok
 - LinkedIn
- **Content Marketing**
 - Writing blogs on different topics
- **Pay-per-click (PPC) advertising**
 - [Google Ad Grants](#) equips nonprofits with up to \$10000 USD per month of free search advertising.
- **SEO**
 - SEO stands for “[search engine optimization](#),” which is the process of getting traffic from free, organic, editorial, or natural search results in search engines. It aims to improve your website’s position on search results pages
- **Public Relations**
 - Your staff can participate in marketing efforts and campaigns, do the radio shows and webinars, and get seen!
- **Influencer Marketing**
 - Partner with influencers
- **Partnership Marketing**
 - Even if a business can’t donate the money, you can always ask to share your mission or share your story/website on their social media and website.
- **Brand Ambassadors**
 - Your volunteers are ambassadors. Encourage them to share and participate online!

Once you’ve decided which channels to use, you will need to set specific tactics for each! Think about the following when deciding your tactics:

- List all the ways you present your organization’s services in the sector.
- What image will you convey? Is your image consistent with your positioning?
- Are your brochures, business cards, advertising, location, interior décor, product packaging, and other methods of presenting your products consistent with the markets you serve?
- Will your customers be able to easily donate from your website? Or from social media?

Marketing Calendar

A marketing calendar can be beneficial. It might be hard to plan out a whole year, but having a calendar to start will help you start the year off right! Manage your marketing strategy with a high-level overview of important holidays and nonprofit sector important dates.

[Shared Calendar with Important Dates](#)



Pro Tip

Use Google Calendar to make a Shared Calendar with your team. Have all important dates loaded and keep adding to it throughout the year.

This [Social Media Calendar Template](#) will help you organize the content you want to post about far in advance. You can use this tool and share it with different members of your organization to plan ahead for different ongoing events and activities in your nonprofit. Stay consistent, and you can grow and scale your social media followers. This template includes two types of tracking and samples of how to use each. A monthly calendar, content repository, and space for scheduled updates on Twitter, Facebook, LinkedIn, and Instagram.

Marketing Budget

Use this section to create a detailed roadmap that outlines the cost of all marketing strategies and tactics involved in hitting the projected results. Here, you can take what you've decided and plan out the cost of the different activities. Make sure it matches the specific goals of the marketing team.

See our [Marketing Budget Template](#) for this section.



Pro Tip

Financial projections will never be 100% accurate, but they will help you identify which promotional expenses should give you the highest return on investment.

Make sure you are taking the time to ask (and record) how your donors and volunteers learned to hear about your organization. This will help you track your progress.

Action Plan

Present a clear and concise picture of how you plan to market/sell your product/service and how these strategies will produce profits. This section is essential because it will give clear direction and expectations to your team. However, this is also the most challenging part because you will need to understand it's a live part of the process. Meaning flexibility will be critical.

Breaks down each team member's responsibilities and line of product/strategy.

- Team Member #1
 - Host a webinar per month.
 - Load # of videos from the platform to the Youtube Channel.
 - Add relevant clips to the video FAQ page if they aren't already there.
 - Create a new On-Demand Virtual Event – [Insert Description/Goal] [Expected date for the first live event].
 - Social Posts: Post at least 20 social media posts directly related to [insert specific] program, with at least one post per week throughout the quarter. Include features on nonprofits we've helped form.
- Team Member #2 - Manager Role
 - Support team in meeting their project plan goals.
 - Build out specific landing pages and ad campaigns [insert expected date to go live].
 - Continue optimizing existing Google Ads, Facebook ads, etc.



Achieve a 30% donation increase by December 31, 2023.

Objective	CTA	ASSIGNED TO	END DATE
Obtain 10 prospective recurring donors through social media.			
Post video advertisements on Facebook and boost them to reach the target audience.			

Analytics and Reporting

This section will help you share the impact of your work with important stakeholders of the organization. Your contribution to the mission as the marketing team is significant, and you want to make sure the rest of the organization is empowered to work with the marketing team to increase awareness and success of their program. When coming up with reports, make sure you can address the following:

- Should you do small-team presentations, reports, or company-wide meetings?
- Specific objectives met in regard to program and overall community impact.