



**GrowthZone**  
smarter association software

# ASSOCIATION MARKETING TOOLKIT



## MARKETING PLAN BASICS

*A practical guide for associations*



## MEMBER SURVEYS

*The 3-step process for gathering actionable data*



## HOW TO CONDUCT A SWOT ANALYSIS

*Strengths, weaknesses, opportunities,  
and threats assessment*



# Association Marketing Plan Basics

When creating a marketing plan, many associations miss the opportunity to clearly differentiate between a strategy and the other necessary plan components.

**“Strategy” refers to the long-term planning and implementation of methods to help an organization achieve its marketing goals.** However, “strategy” is often misused to refer to a mission, goals, objectives, and tactics.

**A well-defined marketing plan with a clear strategy is vital for an organization.**

An excessively diverse, reactionary, and scattered strategy known as the “kitchen sink” approach is guaranteed to fail. It’s easy to get excited about new marketing opportunities; but with limited marketing resources, associations risk spreading themselves (and their strategy) too thin.

# Put your strategy into context and understand the role of each component of your marketing plan:



## **Mission: Where does the association want to go?**

To become the (largest, best) + (nonprofit, networking group) + in the (market, geographical area).

*Not a mission:* To increase sales of membership by the year 2020.



## **Goals: Broad map defining the destination (a.k.a. The Big Picture).**

To (improve, increase) + (events, programs, legislative action).

*Not a goal:* To email our members twice a month in order to increase event attendance.



## **Objectives: Measurable, concrete steps toward the goal, including a completion date.**

To (grow, increase) + our (sales, membership) + by (number, percentage) + among (segment, demographics) + by (date).

*Not an objective:* To schedule weekly meetings with our membership committee.



## **Tactics: What methods are we using to get there?**

Create a (promotion, game) on (social media channel) to educate (prospects, members) about (program, organization) and capture (engagement, followers).

Launch an (offer, event) to generate (interest, likes) among (new, existing) members to (test, return to, join) the association.

Create a new (service, program) with a (unique benefit) that will increase value.

*Not a tactic:* To increase sales of our event tickets.



## **Strategy: How are we getting there?**

To (capture, generate) + (new, repeat) + (members, sponsors) + by offering (incentive, added value) + to (sample, promote) + our (product, organization).

*Not a strategy:* To grow our share of the market.



Clearly defining and writing your mission, goals, objectives, tactics, and strategy is an exercise that will help you to confirm that your association is on the right path.

## **About GrowthZone**

GrowthZone helps organizations grow and retain membership, engage and inform members and prospects, and streamline tedious tasks.

The cloud-based system is powerful, easy to use, and designed to manage all the day-to-day operations of your organization.



# It's Not Just Another Member Survey

## ***Tips for when it's time to send your members "The Survey."***

As you know, some members are loyal survey takers, some like the opportunity to vent or praise, and some will always ignore the invitation. However, there's a good chance you can increase member participation when you **help your members understand why you're conducting the survey** and what you'll do with the results.

## **Here's a simple three-step process for conducting an effective member survey.**



### **Create the Survey**

- Ask interesting questions that are easy to answer.
- Add questions that will help you with blog topics you want to write.
- Include questions that will make it easy for members to benchmark their answers with survey results. (e.g., include ranges for size: Small = 1-50; Medium = 51-100; Large = 101+)
- Change up the order of the questions each year. Remove questions that are no longer relevant or for which you do not need annual data, and add timely questions.
- Don't avoid questions about satisfaction or cost of services. The feedback is helpful when evaluating (i.e. adding and eliminating) member programs.



### **Announce the Survey**

- State the purpose of the survey:
  - To evaluate member value: Results will help the association plan for the future.
  - As a member benchmarking tool: Results will help members compare their answers with peers.
  - Or both of the above.
  - Refer to the results of your past survey, as well as any changes your association made in response to the results of the past survey.
  - Communicate the deadline for taking the survey.
  - Tell members that participants in your survey will be the first to see the results.



### **Share the Survey Results**

- Compile results in a way that highlights the meaningful data that is easy to understand.
- Don't keep the results internal to staff and leadership:
  - Share the results with members.
  - Talk about the results with prospective members.

# HOW TO CONDUCT A SWOT ANALYSIS FOR ASSOCIATION PLANNING

## WHAT IS A SWOT ANALYSIS?

SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. Taking time to regularly analyze these factors is an important part of strategic planning and analysis.

Organizations often use SWOT to determine if a project or strategy can be successful and/or is worthwhile. There are two key components to SWOT – internal and external factors. Strengths and Weaknesses are considered internal, while Opportunities and Threats are external.



## HOW TO CONDUCT A SWOT ANALYSIS

Begin by drawing a box divided into 4 sections. Each section represents one of the SWOT factors. At the top of the box, write down your objective (what you are trying to determine).

For a general analysis, keep it simple. Just start listing things. You'll probably be surprised by what you come up with.

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### Strengths



Begin with **Strengths**. Strengths are internal and are within your control. List things that are tangible. Examples could include strong non-dues revenue and powerful software. Also include intangibles such as reputation, employee commitment, member engagement, etc.

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### Weaknesses



In the next section, make a list of **Weaknesses**. Ideas could be a poor revenue stream, outdated software, high employee turnover.

## WHAT TO DO WITH THE RESULTS

The results of the SWOT Analysis should be used to determine what's working and where improvements can be made. It also allows you to proactively see what issues may be on the horizon (positive and negative).



### Opportunities

**Opportunities** should outline, well, opportunities. Opportunities don't have to correlate with weaknesses. For example, do you have an idea for something that could generate more revenue? Is there an event you've been brainstorming about? Have you had an "aha" moment about a social media campaign?

### Threats



**Threats** can be anything that puts your organization's success at risk. Is there another organization's event that is impacting attendance (and revenue) at your event? Is an online provider offering classes that duplicate your offerings? Anything that impacts your organization's reputation or success or threatens to make your organization obsolete should be considered a threat.

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**The first step is making the decision to conduct the analysis.  
From there the pieces will fall into place.**