

FULLY ENGAGED!

A Marketing Toolkit for Small Nonprofits



fivedirections

Created by Five Directions Consulting

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PART 3: Worksheets, Templates, and Sample Documents

This is a collection of documents that you can access through Google Documents using the links below. You can download each to your own computer by going to the “File” menu and choosing “Download as.” Then choose the file format that works best for you (e.g. Word, Excel, Text, etc.).

Once you download these documents, you can easily replace the information in them with your own organization’s information, customizing them for your needs.

- **Marketing and Communications Plan Template:** [link available in full version]
- **Sample Marketing and Communications Plan:** [link available in full version]
- **How to Develop Your Content “Mix” Worksheet:** [link available in full version]
- **Sample Press Release:** [link available in full version]
- **Media Contact Spreadsheet:** [link available in full version]
- **Sample Membership Survey:** [link available in full version]
- **Sample Event Sign-Up Sheet:** [link available in full version]

I. Introduction

A number of years ago, I was the executive director of a small nonprofit in the San Francisco Bay Area. In that position, I had to learn how to get people involved and invested in our cause—probably just like you. We had a tiny budget and few staff, and the urgent question was always: “**How do we make the most of what we’ve got?**” I needed to make the most of our organization’s resources as well as my own time.

That’s why I created “*Fully Engaged!*” – it’s the guide I wish I had back then to get up-to-speed on marketing principles, with a clear outline of what’s necessary to implement an effective plan.

But here’s the thing: even before I could understand these principles and put them into action, I had to deal with my own resistance to the *idea* of marketing. If that’s true for you too, here are a few reassuring words.

If you feel that “marketing” carries connotations of manipulation and coercion, I’d like to invite you to put that word aside for a moment and think of it like this:

***How can you share what you love most
with the people who will really benefit from it?***

That’s *really* what we’re talking about. It’s kind of like heavenly matchmaking, and when it works well, everyone wins. Mindfulness and integrity are two of my core values, and I *know* that’s possible to apply these values to marketing as well. I practice and coach what I like to call **relationship-based marketing** – and that’s the foundation of this whole toolkit.

There *is* a way to tell people about what your organization stands for– and to do it with integrity.

Fully Engaged! is all about approaching marketing from this philosophy.

I understand how busy you are. Over the past few years, I've invested a lot of my time and money in learning about the best practices in marketing and communications. What I've put together in this kit is based on my own experience with small nonprofits combined with training I've received from leaders in the field of marketing, for both the nonprofit and for-profit sectors.

What I've created for you here is an **easy-to-understand and easy-to-implement system**. By setting up this system, you should be able to see results in a fairly short amount of time. Some of these outcomes may include:

- More people who volunteer for your organization
- More people who take action for your cause, like signing a petition
- More people who tell their friends about your organization
- More people who sign up for your mailing list
- More donors and increased donations from your current supporters

A Note About Fundraising

While this kit focuses on marketing rather than fundraising, this capacity is directly related to your organization's development work. As one nonprofit professional put it, "Marketing is not fundraising, but it is essential to it."

Marketing and communications is all about how you talk to your donors and prospective donors in between the times that you ask them for money.

Marketing and communication are also the vehicles through which you help new people find out about your cause and your organization.

Successful fundraising is one outcome of a good marketing and communications plan. If you follow the steps in this system, you are very likely to see better fundraising results.

How to Use *Fully Engaged!*

This Kit is designed to empower you with information and give you clear action steps that you can carry out alone or (ideally) with your staff and board.

The Kit is comprised of three parts: **The Basics, Skill Sheets, and Worksheets/Templates.**

The Basics, the e-book you're reading right now, is intended to give you the foundational information you need to understand marketing as it applies to small nonprofits and to make good decisions.

The book begins by describing **the three biggest traps** that often plague small nonprofits. You can use this section as a diagnostic for your organization – see if any of these sound familiar to you. Each 'trap' is keyed to a principle in the following section, so if you find yourself really nodding your head in recognition when you read one of them, then you may want to begin working on the Principle associated with it.

The next section covers **four key principles of effective marketing** that are essential for you to know in order to make the best decisions about how you allocate your organization's resources. It's a teach-yourself model that includes action steps so that you can internalize these lessons. When I consult with small nonprofits, this is often the bulk of what I convey to them – so this section is like getting a consultant in a box, and at a much lower cost!

The "Skill Sheets" complement these principles. I've prioritized these skills so you can see what steps you need to be doing first, and approximately how much time they will take.

Finally, the **Worksheets and Templates**, which you can access via GoogleDocs, give you real-life examples to help you get you started.

You can, of course, jump right to the Skills Sheets and start applying the information contained there. But because one of the traps nonprofits often fall into is focusing on tactics rather than strategy, I encourage you to spend some

time with ***The Basics*** first so you have a clear idea of *why* you're doing what you're doing.

By going through each of the skills one at a time, you should be able to make big improvements in your organization's marketing and outreach in a relatively short amount of time.

My goal in creating this Kit is to give you as much information as I believe you'll need to get off to a good start with marketing your organization's message – without having to spend a lot of money and without feeling overwhelmed by it all. I've tried to keep it simple and yet highly useful and applicable to your needs.

I really believe that *Fully Engaged!* will make your life easier and I'm sure it will help you engage more people in your cause. Please let me know if you have any feedback for improving it. My intention is to update it on a regular basis. If you've purchased the Kit, you'll receive these updates.

Good luck, and thank you for all that you do to make the world a better place!

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