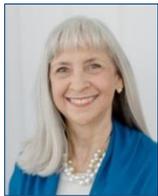


May 3, 2016 ■ Marketing Workshop

Positioning Your Brand For Success: Doing More with Your Nonprofit Marketing Resources

Presenters

Janet de Guehery
Communications & Marketing Manager
Florida Community Loan Fund
janet@fclf.org
407.246.0846



Lisa Junkerman, MBA
Principal & Chief Marketing Officer
Chief Marketing Associates, Inc.
lisa@chiefmarketingassociates.com
407.252.3983



Presenter Bios

As Communications and Marketing Manager, **Janet de Guehery** develops and implements branding and marketing strategies and programs for Florida Community Loan Fund, a statewide CDFI. She is responsible for communications with investors, supporters, borrowers, and policy makers, ensuring consistent messaging across all channels and platforms, including materials for print and web. She works closely with all departments, actively promoting the success and positive impact of FCLF borrowers in Florida communities. Janet has experience with for-profit and non-profit, across the fields of marketing, administration, and accounting; enabling her to see the complete picture in FCLF's lending transactions from beginning to end.

Both a strategist and practitioner, **Lisa Junkerman** delivers 25 years of applied, integrated marketing expertise on local, national, and global levels. She has worked for Fortune 250 companies, including Motorola, Inc. and Progress Energy (now Duke Energy), and in the higher education industry where she was Assistant Vice President and CMO for Strategic Marketing for Rollins College.

Lisa has had an opportunity to provide marketing consulting services for clients including Florida Community Loan Fund, Special Olympics Florida, Digitec Interactive, ITEC Entertainment Corporation, Sno Spot/Snow Magic, Ascend IT Solutions, and Wittenberg University.

Lisa has an MBA degree from the Crummer Graduate School of Business at Rollins College and a BA in Business Administration with a marketing major from the University of South Florida. She has also been an adjunct marketing instructor at Crummer Graduate School.

Positioning Your Brand For Success, Background

Florida has surpassed New York as the nation's third-largest state, according to a report released by the U.S. Census Bureau in March 2015. As Florida grows, Florida Community Loan Fund, a statewide CDFI, has responded accordingly, with cumulative lending of over \$230 million into projects that have resulted in more than \$750 million for community and economic development throughout Florida.

Florida Community Loan Fund realizes the importance of reaching out to nonprofits and mission based for-profit organizations not only with flexible financing and hands-on technical assistance, but also by sharing expertise in areas such as marketing and communications. With more than 20 years of experience in Florida, we have assembled a toolkit of marketing best practices that will help others spread the word about their organization and the mission, and ultimately help the underserved populations in our state.

Even though we are all working towards similar community development goals, we are often forced to share the marketing audience, the same funding sources, and we are competing with so many other distractions in today's world, where attention spans that have gotten smaller over time. By teaming up with best practices marketing, all nonprofits can get ahead and reposition their own brands and organizations for success.

Together, FCLF and Chief Marketing Associates realize that we have valuable information we can share across the state and the community development industry. Our genuine hope is that you will take away some real learned practices that you can implement in your organization, beginning first thing tomorrow.

Positioning Your Brand For Success, Workshop Description

An organization's most valuable asset is their brand. However, today many organizations devote little time to this important element of their value in the community and the world. So much can be leveraged, beginning with the way in which you communicate to the way your brand is positioned on social media, etc. We believe the best practices that we will share with you will help you get the edge and position your brand for success.

This workshop will cover:

- What is a brand? An overview of branding vs. marketing vs. logo
- Effectively telling your organization's story across all channels
- Tips and hints for optimizing social media
- Leverage content management and all your marketing resources and measuring results.

According to the The Economist, marketing will increasingly be seen less as a cost and more as a source of revenue. This means that all marketing activities including PR, branding, social media, marketing communications, web development, etc. should be strategically aligned to support an organization's objectives and business goals.

There are a multitude of marketing channels that are available to today's organization. The key is to determine those channels that will work best with your goals and can help bring your story to life.

Participants Will Learn

- How best practices marketing can further your organization's mission and build your brand.
- Use your resources and investment effectively through "smarter marketing."
- Optimize your marketing and branding whether you have 5 minutes a day or 40 hours a week.

Positioning Your Brand For Success: Doing More with Your Nonprofit Marketing Resources

1. Audit your brand

What is a brand? What is marketing? Here are definitions from the American Marketing Association:

MARKETING: Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

BRAND: A brand is a name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers.

What makes a top global brand? From Interbrand

Internal Factors

- Clarity
- Commitment
- Protection
- Responsiveness

External Factors

- Authenticity
- Relevance
- Differentiation
- Consistency
- Presence
- Understanding

Assess and leverage your brand equity

1. Brand Inventory

- Marketing, Communications, Branding
- Processes
- Materials
- Programs
- Internal Support

2. Brand Exploratory

- Perceptions

3. Brand Equity

4. Future Opportunities

- Organizational Goals
- Mission Alignment

5. Brand Strategies

- Positioning
- Management

2. Reach your target audience

Ways to define and reach our target audience:

- Marketing Research & Analysis
- Millennials to Baby Boomers
- Market Segmentation & Strategy

Define your target audience

- Clients
- Customers
- Grantmakers
- Funders
- Government Officials, Local / State
- Press and Media

Reach your target audience

An example of an exercise conducted by Florida Community Loan Fund:

- Focus groups and surveys of borrowers, investors, staff, community leaders
- What are our brand's strengths and attributes?
- Does our name reflect those strengths and attributes? YES
- Does our logo reflect those strengths and attributes? NO

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3. Align your tactics with your mission

Best practice marketing creates relevant brands and brand advocates

- Plan (Strategy)
- Integrate (Functional Collaboration)
- Perform (Execution and Measurement)

What are the goals from your strategic plan or marketing strategy? Examples could include:

- Raise awareness
- Drive users to website
- Create loyal fans
- Promote events
- Raise funds

Marketing action plan template

Objective 1.

Audience	Action Items	Timing	Owner(s)	Metrics

4. Tell your brand's relevant story

The Relevancy Continuum

- Awareness
- Consideration
- Trial
- Experience
- Bond
- Champion
- Back to Awareness; it's a never-ending circle

Content Development Process

- Curate or Create
- Designate
- Distribute
- Evaluate
- Strategize

Storytelling, Easy as 1-2-3

1. Houston, we have a problem. Introduce the character and situation; how it relates to your mission.
 2. Here's what we're going to try. Character faces obstacles, tension mounts.
 3. Yes! It worked! Character triumphs, gets payoffs. How did your organization act as a catalyst to solve the problem?
- No stories without numbers; no numbers without stories.
 - Use your relevant story across all channels.

5. Use your resources wisely

Evaluate your marketing spending by program

- What are the functional needs of your marketing plan, and how can you accomplish them with your staff resources
- Review your marketing channels and spending plans and evaluate each area; is it time to make changes in budget and/or time spent in some areas?

Start small and scale up

1-5 hours per week:

- What's new / trending this week?
- Engage with 3 customers and 3 influencers per week
- Spend 5-15 minutes a day on communications

5-40 hours per week:

- Re-examine your strategy and set interim goals.
- Create content: take photos, make videos, use rich content; think about what your audience wants.
- Consider your media strategy outreach; plan press releases in conjunction with your editorial calendar.
- Develop a paid advertising strategy; consider targeting specific demographics.
- Listen Carefully. Spend 1 hour a day engaging on social media & reacting (split AM/PM). Conduct surveys, focus groups.
- Measure success using analytics and insights. Use the data to see what's working and tweak.
- Decide when it's time to outsource; there are services that can help you manage social media and other communications/ marketing needs.

6. Rethink the way you've practiced marketing in the past

Have your past marketing choices been effective?

1. No single tactic works well to build an audience. Integrated, omni-channel marketing is essential.
2. What you have to say is more important than the tactics you use. Content should focus on "customer" needs.
3. Invest more in turning customers into advocates who influence references, referrals, word of mouth.
4. Consider digital events like webinars instead of in-person events.
5. Hospitality pays off when conducted in intimate settings: dinners, seminars, open houses.
6. Make the website the hub of prospect experiences.

Rethinking past marketing may mean:

- It's time for an extreme makeover – name change, brand image change
- It's time for a new website - keep up with current industry and online trends
- It's time for a new addition to your social media mix – where is your audience? Video? Photos?
- It's time to go mobile – in your website, your email blasts, emphasize social media which is mobile-based

7. Strategize your marketing mix

- A majority of consumers begin making a purchase decision in one channel but complete their transaction elsewhere.
- Use "omni channel" branding: all marketing channels form a united front to support the organization's mission and to drive brand equity
- Maintain your website:
 - Whatever channel you use, wherever you are proudly displaying your brand, it all leads back to your website.
 - It's the space that you own. Is it up to date? Is it accurate? Is it fresh and current?

8. Build your army of brand advocates

"The bottom line is that any brand — no matter how strong at one point in time — is vulnerable, and susceptible to poor brand management."

Kevin Lane Keller
Tuck School of Business
Dartmouth College

A **brand guide** can be a tool to build your army of advocates; use it with internal staff and partners to convey your mission statement, brand promise, brand character, brand attributes.

A **creative brief** is an important tool for any marketing plan; it should be agreed upon by all parties prior to beginning the campaign. Use it throughout the process to remind you of goals and help you remain objective.

9. Manage all the moving parts

Marketing Metrics.

Set up a tool to track various aspects of your marketing. Suggestions for assessment:

- General marketing
- SEO / SEM
- Social
- Web
- Marketing operations

Use a roadmap to plan and implement a marketing campaign:

- Secure expertise and build a team
- Set meeting schedules
- Assign roles and responsibilities
- Determine delivery dates
- Prepare external collateral
- Socialize internally
- Launch!

Measure, Track, Improve.

Examples of measurement that can be tools for implementing improvement:

- Website: use Google Analytics to look at overall sessions – new vs returning visitors – mobile vs desktop – top traffic sources
- Social Media: use native analytics and insights to measure: followers – impressions – engagement
- Email Newsletters: use statistics to track: open rate – click-through rate – bounces - unsubscribes

10. Have fun, be flexible and be persistent!

- Make it fun for staff, board, volunteers
- Play with different methods; see what works and what doesn't.
- If at first you don't succeed, try, try again.

Nonprofit Rebranding Examples

Brand	Noted Areas	Cost	Additional Notes
RISE	Name change, tagline, logo, new website	\$26,000	Jennifer Adams: "Take \$20,000 to \$30,000 and invest in the rebrand."
Good360	Tagline, logo and printed materials, national event, office building	≈ \$500,000	Good360 is an extremely large nonprofit organization.
Rainforest Trust	Name change, Facebook, Twitter, Additional media (The Washington Post, Time, National Geographic)	less than 5% of total expenditures	After changing its name to Rainforest Trust, donations to the nonprofit organization more than doubled.
AARP	Social media, digital media, print materials, and the company website	\$25-30 million	AARP is also an example of a larger organization that consistently experiences success with rebranding.

Other Resources

TechSoup blog & products for nonprofits	www.techsoup.org
Google Analytics	www.google.com/analytics
Google AdWords, free for qualifying nonprofits	www.google.com/adwords
Adobe CC, monthly based subscriptions from \$10/mo to \$80/mo, depending on software you choose	www.adobe.com/creativecloud
Adobe Premiere Elements, photo/video editing for around \$100	www.adobe.com/products/premiere-elements
Canva.com – photo editing, free & paid versions	www.canva.com
PiktoChart, create data visualizations	www.piktochart.com
Easel.ly, create data visualizations	www.easel.ly
The Noun Project, free icons	www.thenounproject.com
Google Design, free icons	www.design.google.com/icons
Google Design, free design tutorials	www.design.google.com
Hootsuite, blog has lots of social media tips	www.blog.hootsuite.com
Social Media Image Sizes Cheat Sheet	www.makeawebsitehub.com/social-media-image-sizes-cheat-sheet
The Science of Storytelling	www.lifehacker.com/5965703/the-science-of-storytelling-why-telling-a-story-is-the-most-powerful-way-to-activate-our-brains
Tracking Outcomes to Tell Stories	www.npengage.com/nonprofit-management/how-will-tracking-outcomes-help-your-organizations-story
14 Ways to Share Results with Donors	www.slideshare.net/kivilm/14-ways-to-share-results-with-donors