
Ben Delaney's Nonprofit Marketing Handbook

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**The hands-on guide to communications and
marketing in nonprofit organizations**

By Ben Delaney

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Table of Contents

Acknowledgements.....IV

Building a Successful Nonprofit MarCom Program VIII

1 Introduction: System Marketing™ Your Key to Success..... 10

2 How Your Nonprofit is Just Like a Hot Internet Startup..... 14

3 Some Best Practices for Nonprofit Marketing..... 17

4 A Few More Best Practices of Nonprofit MarCom 21

5 Using Social Media Well.....26

6 The Importance of Branding 31

7 You May Have Heard This Before.....36

8 Building Your Messaging Foundation.....40

9 The 4 C's of Good Communications 45

10 The Marketing Mix..... 49

11 Marketing vs. Sales 70

12 Websites 101: Making Your Website Findable 73

13 Making Search Engines Work For You 82

14 Stickiness: Your Website Needs It..... 88

15 Testing, Testing, 1,2,3 94

16	The Best Exercise is Walking	99
17	Making the Most of Events.....	107
18	Writing the Press Release that People Read.....	117
19	About Advertising.....	122
20	What to Measure, Why and When	128
21	How to Help Your Board Help You.....	135
22	Helpful Resources.....	139
	Your Nonprofit Marketing Glossary	142
	About the Author	147

Building a Successful Nonprofit MarCom Program

About this book

There are more than a million nonprofit organizations in the United States. Every one of them needs to tell its story, find clients, solicit donations, sell services, and encourage its volunteers. Yet few have a marketing department, and many face serious challenges in meeting their communications and marketing goals.

When I was hired to be the first ever marketing and communications director for a San Francisco nonprofit engaged in public school reform, I searched Amazon and my local bookstores for a guidebook. With more than 30 years of marketing experience, I was comfortable that I knew my craft – but I wanted some counsel on what marketing and communications (MarCom) was like in the nonprofit world. I was terribly disappointed. The few books available that addressed the issue were dry as dust – academic tomes that seemed to be a hundred years old. Still, I bought the most-praised. And was I ever frustrated. The author, authoritative, knowledgeable and di-

dactic, struck a note of ivory-tower purity that had little in common with the down and dirty, hectic, pressure-filled, and deadline dependent world of marketing in which I had worked for so many years. And indeed, when I started my new job I found that marketing in a nonprofit was a lot like the work I had done for dozens of high-tech companies and startups. It was not dry and dead. It was full of life, replete with exacting requirements, personality issues, cultural sensitivities, and impossible deadlines.

After I left that job, ironically the victim of my own successes (I couldn't convince them to raise prices on their events and services, and so, the more seats I filled the more money they lost.), I decided that I could help the next me, the nonprofit MarCom initiate, by sharing what I have learned and summarizing what that person needs to do, and how to do it successfully in the nonprofit environment.

Addressed to the MarCom manager in small to medium sized nonprofits, this book assumes that the reader has little formal knowledge of marketing. In plain language, it provides a hands-on reference that can be referred to frequently, providing checklists and actionable tips to make marketing easier and more effective.

I start by comparing cultures and continue through the basic concepts, tools, and processes that ensure success in nonprofit MarCom. I offer tips on choosing marketing tools and how to use them effectively. I conclude with a glossary and additional resources for the nonprofit marketing team.

1

Introduction: System Marketing™ Your Key to Success

Why integrating communications into every activity gives you way more bang for the buck.

System Marketing™ means that your marketing is a system, in the same way that your financial procedures form a system. In either case, the specific task is aware of, and is informed by, the total organization. Everything affects everything – it's all connected.

System Marketing directs that you align your goals, procedures, and communications to all pull in the same direction, with verbal, non-verbal, electronic, and print messages, and staff attitudes, all reinforcing the same message. It ensures that everyone in the organization is speaking with one voice.

Most importantly, System Marketing requires a deep understanding of the marketplace and the customer, and the ability to address the customer's expressed, implied and inferred needs and desires. This requires research. That research may be as simple as a comment sheet

on your front counter, or as complex as a multivariate, blind, controlled test. The cost typically varies with the number of words used to describe the research.

For example, putting a comment sheet on your front counter requires nothing more than a piece of paper, a pen, and some Scotch tape. It will result in some of your customers providing valuable insights into your operation at minimal expense. The multivariate, blind, controlled test will probably take several people several months, will require a series of letters after the authors' names, will result in a colorful bound report with footnotes, and will cost appropriately. In either case, when research is done thoughtfully and with well-defined goals, it is almost always worth the money.

Let me give you an example of how research helps. A while back I was asked to provide a campaign to increase interest in and visits to a nice retirement home in Marin County, California. As I talked with the staff, I realized that they had only the vaguest of ideas about why people chose, to live there, or not. So we started asking some questions.

First we conducted a written survey of the current residents, asking them what they liked about living there, along with a few other questions. We also asked where they had lived before. From this we gained a lot of insight. As expected, people liked the beautiful grounds and that it was easy to get into town for shopping. The food was good, as were interactions with the staff. What surprised us was the most important factor in the move-in decision: People who lived there really liked that they could bring their own furniture!

We then sent out a postal mailing to a large population. I don't remember the exact number, but we mailed to more than 10,000 people over age 55, within a 40 mile radius of the facility. Why 40 miles? Because that's average maximum distance from which residents had come. Some had come from farther, but more than 80% had previously lived within 40 miles.

The mailing included a brochure illustrated with professional photos, taken on the grounds, of people who actually lived there, sporting the headline, “Come Home to the [Facility]”. We emphasized the hot-button items we knew about from the survey: just like home, extra secure and safe, bring your favorite furniture, close to your friends and family, and a familiar landscape.

This became the most successful direct mail effort I have ever done. We received a 24% response rate, and a 10% conversion rate, thereby beating expectations by a mile, and filling the waiting list. I am convinced that the research set the tone that enabled this successful effort. But equally important was the participation and buy-in of the staff, the truthfulness of the messaging, and the ability of the intake staff to model exactly what people expected. That’s System Marketing at work!

System Marketing in your organization

Your organization can establish System Marketing as SOP (Standard Operating Procedure). Do the research needed to truly know your customers, the marketplace, and the outside factors that impact that marketplace. Share staff knowledge about current customer-facing processes and communications. Listen to complaints, and don’t dismiss them as trivial. Be sure everybody is involved and heard. Review your mission, vision, objectives and impact statement to be sure they are current and actually reflect what you do and want to do, and how it happens.

Then you can unify communications and attitudes. Attitudes are important because a large part of your customer and prospect communications is old fashioned conversation, as well as emails and other personal interaction. It is essential that everyone understands and buys in to the official message, and is able to reflect it in every action and utterance including answering the phone, responding to

an email, completing a proposal, talking at the bar at a conference: the language, style, and talking points should all reinforce your messaging. That is reinforced by consistent public messaging, including your website, logos, business cards, brochures, and advertising. When all of this is synchronized, then you have a marketing system and System Marketing.

Frankly, I don't consider this rocket science. I have been thinking about it for a long time and have seen the theory proven. Much of this is common sense, and just plain good business, be it for- or non-profit. This book breaks down various marketing tasks and offers suggestions on how and when to use them. Regardless of the marketing mix you choose, when you keep System Marketing in mind all of your marketing will be more effective.

2

How Your Nonprofit is Just Like a Hot Internet Startup

There are more similarities than you might expect.

People frequently ask me how I went from high-tech marketing to the nonprofit world. Actually, I don't see that much difference between the two environments. They have a lot in common. High-tech companies and nonprofit organizations share many characteristics and face similar challenges. That means that a good marketer, after learning the important aspects of an organization – like programs, products, services, and culture – can handle a nonprofit's needs as easily as those of a high-tech startup.

Here are a few of the things that nonprofits and high-tech companies have in common:

Mission driven: Have you noticed how high-tech marketers often have titles like “guru” or “evangelist”? That's because just like nonprofits, high-tech startups are driven by their mission, with the

excitement and the compulsion to get their message out – a message of new hope and opportunities presented by new technologies. Nonprofits are driven by similar goals; to ensure that the right people hear their important message of needs and hopes. This is a basic factor in communications for both constituencies. Many of the same techniques, carefully tailored to the needs of the organization and the expectations of the audience, will work in either type of organization.

Led by a brilliant, inspired leader: The engineer who invented the technology still heroically leads the company. The Executive Director, brilliant in her understanding of the issues, people, and connections at the nexus of the cause, is the go-to voice on her area of expertise. High-tech and non-profits, led by really smart people, often lack basic Marketing and Communications (MarCom) skills. Both types of organizations need strong MarCom leadership and often lack that expertise.

Limited funds: Even the hottest venture-capital funded tech startups have to make money, or they end up dumping all those cool Aeron chairs on eBay. Nonprofits are chronically under-funded. There are many smart, low-cost marketing techniques that can quickly help the bottom line.

Need for strong branding: Every organization needs a strong brand. Brands help establish a comfortable, family-like relationship. Think about the Girl Scouts, Nike, The American Cancer Society, Google, or the Salvation Army. Each of those brands hold meaning for a lot of people, and because of that familiarity half of the communications job is already done. New company – new cause; both need the same thing: a strong brand that elicits warm feelings in the heart of the organization's constituency.

Unsure of the value of marketing: When funds are limited, not every good idea can be followed up. Some projects get done today,

some are put off, some are canceled. Often the first casualty of financial constraints is the MarCom budget line. That is a huge mistake. When an organization is small, or is dealing with a setback, or has a great new opportunity, marketing helps make good things happen. Marketing doesn't have to cost a lot, and it should be treated as an investment, with goals, milestones, and a return on investment (ROI).

Need for accountability in marketing: Every organization needs to keep its eyes on the ball of accountability. Marketing results can and should be measured. How many people responded to a mailing? Were they the people we were hoping to hear from? Did our ad bring in the number of inquiries we expected? Does our website provide good quality leads? Are people retweeting our tweets? Those kinds of questions matter in every organization.

So you see, the nonprofit world isn't that different from that of high-tech startups. The same time-tested marketing tools (frequently upgraded as technology changes) help any organization that is trying to make the world better. While the objectives of a high-tech company will be completely different from those of a nonprofit, the same tools work to get the message out. An advertisement can sell disc drives or encourage donors. A press release can announce the latest version of the Gizmotron, or let people know that the millionth child has been saved. You can do either.

After decades of selling Gizmotrons, I can assure you that it feels really good to be working to educate children, save the environment, stamp out poverty and disease, or encourage peace.

3

Some Best Practices for Nonprofit Marketing

There's a lot to learn from the marketing pros

My first six months in the nonprofit environment was a real eye-opening period. I felt confident that I knew my craft, but I had a lot to learn about the culture and work style of the nonprofit (NP) environment. Though they were sometimes tough, the lessons I learned have helped me going forward. But I recognized that there were a few things that NP organizations can learn from the private sector.

In particular, the best practices of marketing that are routinely applied in the for-profit (FP) world can provide useful structure for the NP marketer, in large or small organizations. MarCom is essential to nonprofits, for getting people to events, encouraging donors, and even selling products. System Marketing is especially important for nonprofits, because it enables the leveraging of all MarCom efforts.

Let's look at a few of the MarCom best practices that have a place in the NP world. The next chapter adds some more best practices.

Who's in charge here?

Responsibility and the collaborative decision-making process.

In a democracy, everyone has an opportunity to speak. Each citizen gets a vote. Each vote is of equal value. After a count of votes, decisions are made.

Most businesses are not democracies. Most businesses are run by (hopefully benign) dictators, who have virtual life and death power. Decisions can be made quickly, and responsibility for bad decisions is usually obvious.

Many NPs are run more like democracies than most FP organizations. In NPs, staff meetings are held regularly, departments and various groups meet frequently. Everyone has a say. And depending on the leadership style of the top person, decisions are made by consensus. Often, decision-making is a long, laborious process as the leadership struggles to create consensus. Responsibility for bad decisions is shared, because everybody bought in, or at least, had a say.

However, in an efficient business somebody has to be in charge. Somebody has to watch the budget and deadlines, and ensure that the work is being done, correctly, on time, and at the right price. Each project needs one (and one only) accountable manager.

Once a decision is made, make one person responsible for its correct execution.

Accountability

Some organizations see their marketing budget as a witch's cauldron. They throw money in, and magic happens. Many a manager has complained to me that he was spending his marketing budget, and making sales, but he had no idea what he was getting for his money. Hearing this always makes me cringe. This is the manager

who, when times get tough is going to cut the marketing budget to save money. That should seldom happen. Marketing is an investment, not an expense. And like any investment, it needs to be closely monitored and managed. And by the way, many studies show that in tough times, the companies that continue marketing emerge much stronger than those that cut marketing.

Accountability in marketing is not just a slogan. It is a necessity. Each program should include goals, a budget, milestones, deadlines, and a post-action debrief.

If you are leading a team, do your best to get the right people on that team: people, be they staff or vendors, who will do what they promise, when they say they will. Be proactive about getting the other resources you need to do the job properly. Set reasonable expectations, so that people have a realistic idea of what their roles and responsibilities are, and the schedule of the project.

Accountability in marketing is based on measurable goals like: We expect between 1000 and 2000 leads from this mailing; This ad will produce 200 leads and five new customers; This program will bring us between \$200,000 and \$500,000 in new pledges; We expect this press release to result in two national stories and ten regional articles; or This campaign will bring us 10 new major donors, 20 renewals, and 200 new, smaller donors. These are measurable goals.

Every well-planned MarCom effort includes anticipated results. Every campaign should also feature a full-team, post-campaign debrief in which you look at how well the process went, the results of the effort, and how to do it better the next time. Obviously, efforts that don't meet expectations need to be looked at closely to see why you missed your estimated return.

Marketing is a repetitive endeavor. Even an effort that provides better-than-expected results should be looked at to see how you exceed-

ed your goals, and to determine if it was a fluke or replicable.

Remember, while there is an art to marketing, most of it is science.

Test, test, test

How do you know what's best in marketing and communications? You test, test, test.

MarCom testing is the research that makes MarCom a science. You can test message, demographic selections, imagery, different media, and different options within a type of media. You do this testing by setting up small, controlled experiments, and evaluating the results.

Testing is so important that I devote an entire chapter (Chapter 15) to it. Stay tuned.

You (often) get what you pay for

Volunteers, and the hazard of the lowest bidder.

Volunteers are great if they can do the job you need done. Remember, though, to balance cost versus benefits. Because MarCom is such a strategic function in the organization, the use of volunteers has to be carefully planned. For example, I think nearly anyone can stuff envelopes properly. But I want a skilled professional designing my website, or writing a press release.

Also, I generally advise against using a lowest-bidder budgeting plan. If your vendors are bidding too low, they may not be making enough money to provide support when you need it. It's important to build a reliable team of vendors, so that when you get in a deadline bind, they are willing to help you. Low bidders have less loyalty. All else being equal, I typically prefer a low to middle bid.

There are plenty of other best practices in nonprofit MarCom. The next chapter will give you four more.