

***"Would you tell me, please, which way I ought to go from here?"***

***"That depends a good deal on where you want to get to," said the Cat.***

***"I don't much care where --" said Alice.***

***"Then it doesn't much matter which way you go," said the Cat.***

***-Alice in Wonderland***

An annual marketing plan is the blueprint for reaching current members and attracting new ones to your organization. It takes into account four things: the market, the member, your unique promise and the way you deliver your services. The marketing planning effort typically coincides with your fiscal year. It is finalized after determining your upcoming years' objectives. This is not an easy or quick process: a good plan takes collaboration and sometimes weeks or even months to complete.

The marketing plan balances two key levers: 1) the demands of the market and your members, and 2) your fiscal responsibility to your board. Let's call this the ying and the yang of the marketing plan. Additionally, how can an association possibly establish a plan in the prior year and expect it to hold true for the next 12 months? This is especially true during the turbulence of today's market, the speed of change, and technology innovation in the way you interact with members. There is risk when you, your board, or your staff sticks to the budget with no wiggle room. This might give you reason to rethink your connection to the market and if you are staying abreast of best & promising practices. The choice of staying the course might risk new opportunities and a resulting payoff. The most current plan, though well thought-out, is less relevant as the market changes. Then again, you would never modify your plan randomly based on gut instinct!

### ***So where does that leave the plan?***

As you build your plan, remember that effective marketing follows both methodology and the market; one changes and one does not. Your plan is a balance of: 1) careful preparation today, based how the market and your members behave now. Balance this with the foresight to: 2) recognize the unmet needs of your members and to innovate with new ideas to serve them better. The best marketers balance the preparation and innovation without putting the organization at risk. You'll be prepared if you look for, and educate yourself on the trends.

**Rule #1:** You owe yourself a marketing plan. It can be a simple one, detailed, complex, or lengthy. The plan is your roadmap to the activities and a budget to reach your organization's objectives for the upcoming year. The activities should link to your annual objectives.

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# Annual marketing planning or continuous market planning?

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*The link between your Association's business objectives and the plan to reach them*



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"A good plan, violently executed now, is better than having  
a perfect one next week".

General George S. Patton

While building the plan, first and foremost, use input from your members! Then use whatever statistics, data, and measurements you can to determine which marketing tactics are having the biggest impact towards your goals. The longer you track this information, the more valuable it is. Knowing your members' unanswered needs (today) and their satisfaction will keep you on the right track. As you look back to this year's activities so far, be honest about this: did you get the return you were looking for?

**Rule #2:** Sensible marketers measure constantly. They understand what has already happened, and then they then quickly begin to look forward to what they can do to improve. CAUTION: Be sure your staff does not use gut instinct to evaluate activities. Even the in-process measurement is a measurement. When you hold an event that results in multiple members interested in your leadership program, although this is not a revenue return, it is a new opportunity that can be evaluated and measured. You can monitor your Facebook page or blog to gather feedback about an event or project. This can be a valuable measurement.

**Rule #3:** Look long and hard at marketing tactics (and expenses) that do not pay off. Let's use two examples. (1) If an RPAC event is not yielding the funds you expect, go back to the drawing board. Is it time to consider some innovative ways to do good old-fashioned fundraising? Try rubbing elbows with elected officials at a trendy restaurant's private room instead of a chili cook-off; Experiment with raffles instead of auctions. (2) If the development and print cost for your newsmagazine or papers is \$10,000 per year, yet after years of publishing, you don't have members asking questions or giving feedback, it might be time to look at a different way to communicate the information. Or, this could be your slush fund for something new.

Perhaps a quarterly webcast or podcast in a news-show format would be more effective for your audience and help get their attention. Or an online magazine that is super printer friendly! There is lost opportunity every day that an outdated plan remains in place.

As you look at this year's plan, take some time as a staff to determine which tactics are most effective, and which are no longer working. Just as important, ask yourself:

- Are your services meeting your members' needs? Do you know?
- Are you prepared to take advantage of a new activity that will have a payback to you AND help you achieve your goals at a reasonable cost?
- Do you quickly make new adjustments if you determined that today's market needed a different plan?

Marketing plans should be realistic and do-able. Invest in a plan, even if it is short and has five to ten activities you deliver measurable value. Hopefully you highlighted one idea from this article. If not, please reread – this is a big step to masterful marketing!