



5A Re-defining Marketing: Metrics and Marketing Performance for Associations

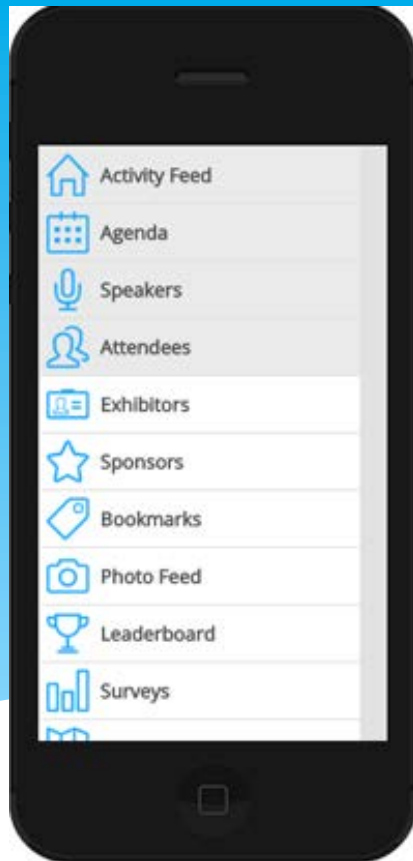
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Redefining Marketing for Associations

Alex Makin, Syneka Marketing

Overview

- Defining Marketing
- The role of marketing in associations
- Marketing Governance
- Measuring marketing performance



What is Marketing?

Marketing is one of the most understood terms for both businesses and not-for-profits

Defining Marketing

Australian Marketing Institute

- Marketing creates **value** – for customers, shareholders and society as a whole.
- Creates an alignment between what consumers value and what organisations offer.
- Offers techniques that help firms better understand the **needs, preferences and perceptions of their customers** (a prerequisite to adding value to them),
- Ways of using that understanding to focus the value-creating and communicating activities of the firm into areas where they will be most effective.

American Marketing Association

- 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

Oxford Dictionary

- The action or business of promoting and selling products or services, including market research and advertising

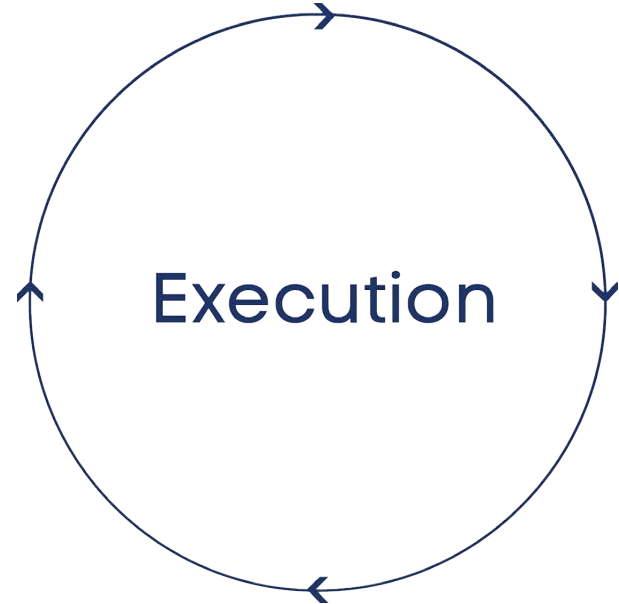
What does this mean?

Marketing **consists of strategies** that **create value** by understanding the organisation's context and how to reach and influence stakeholders

Marketing builds your capacity to achieve your goals

Marketing is not...

- A logo and brand
- Advertising
- Search engine optimisation
- Member letters
- PR, social media or content
- Fundraising or events



Marketing Is

- Measurable and accountable
- Includes a whole of organisational approach
- Based on the concept of the marketing mix
- Requires a combination of creativity and science

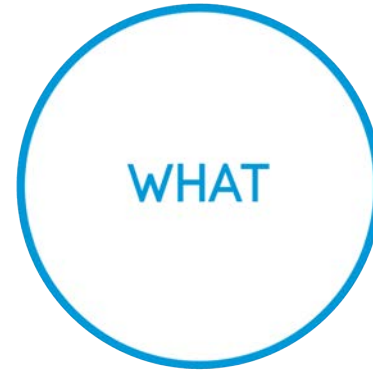


Core Values

**Why does your association exist?
What value does it deliver?**

Business/Organisational Plan

- Identifies what you want to **achieve**
- What do you want to achieve within **twelve months?**
- What do you want to achieve over the **next three years?**



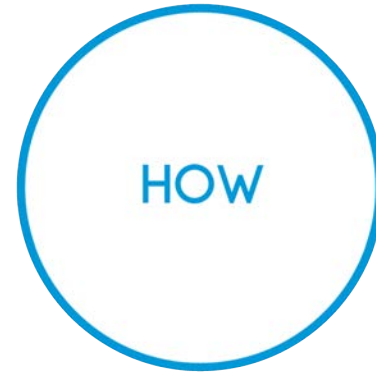
Business Plans

The role of Business Plans

Do you have a Business Plan?

Marketing Plan

- Looks at **how you achieve** your vision
- Identifies objectives that will **achieve this vision**
- **Outlines actions** that will fulfil these objectives
- **Needs to be consistent** with your business plan



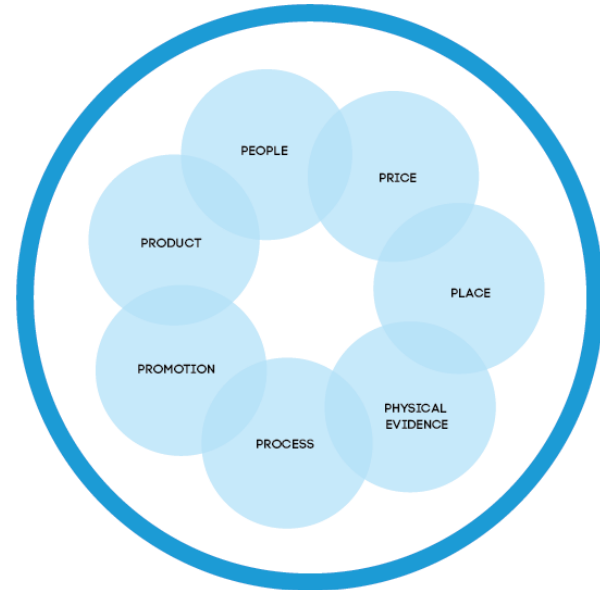
Marketing Plans

Marketing in the Sector

Do you have a Marketing Plan?
Does it cover all elements of the marketing mix?

The Marketing Mix

- Marketing needs to involve your **entire organisation**
- The marketing mix (also known as the customer/stakeholder experience) forms the basis
- Marketing needs to work **within and across** an organisation
- All of these components **must be consistent**



MARKETING IS A HOLISTIC FUNCTION

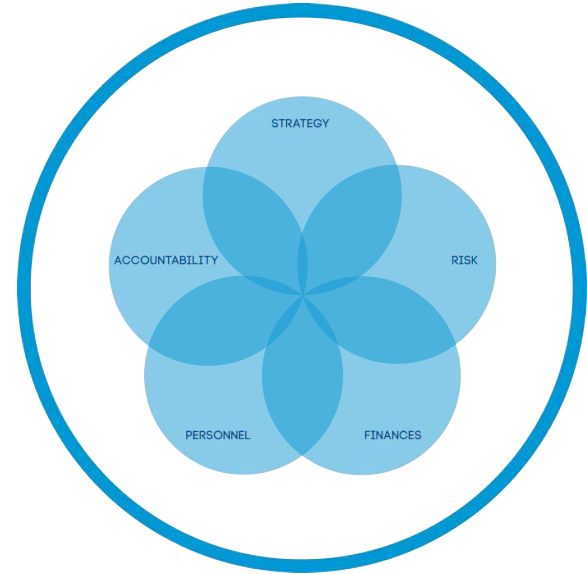
The State of Marketing

- Associations and not-for-profits tends to view marketing as **execution based**
 - Communication
 - Fundraising
 - Sponsorship
 - Membership
- Results in **gaps in strategic insights** and missed opportunities
- Causes **gaps in performance indicators** and evaluation



Marketing and Good Governance

- Marketing governance
 - Strategic and marketing planning
 - Risk management
 - Financial management
 - Human resource planning
 - Compliance and accountability systems.
- Reinforces **good governance**

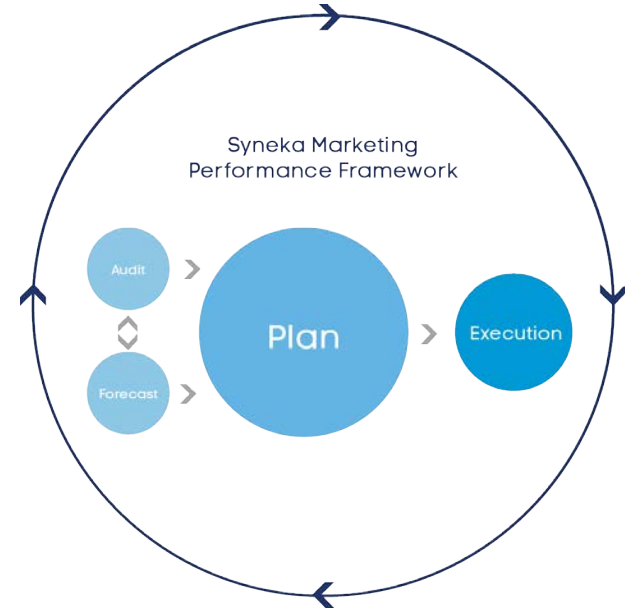


Marketing Governance

How is Marketing Governance defined in your organisation?

Success Starts with Strategy

- A Framework for continuous **marketing performance**
- Reviews existing activities **(Audit)**
- Identifies future opportunities **(Forecast)**
- Aligns organisational goals with marketing outcomes **(Plan)**
- Measures effectiveness **(Execution)**



Marketing Audit

- The Audit provides a marketing **health check**
- Assesses **current marketing activities**
- Improve **effectiveness and efficiency**
- **Evaluates results**



Marketing Forecast

- Assesses **potential opportunities**
- Research and insights to **validate assumptions**
- Determines **market positioning**
- Defines **campaign targets**



Forecast

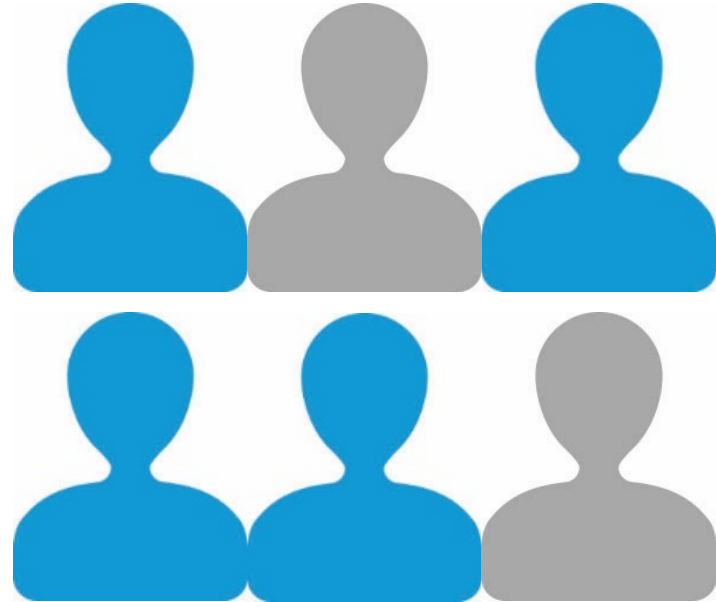
Marketing Plan

- Align your **marketing outcomes with organisation goals**
- Determine **what you need** to succeed into the future
- Identify **how to achieve** this vision through short-term and longer-term requirements
- Defines **metrics and performance indicators**



Understand your Stakeholders

- You will have multiple target markets
 - Members (and their outcomes)
 - Other associations
 - Government
 - Funding partners
 - Volunteers
 - Customers/clients
 - Committee/board members
- Each have their own **desired outcomes**



Your Stakeholders

**Who are they and why are important?
Why should they pay attention and engage?**

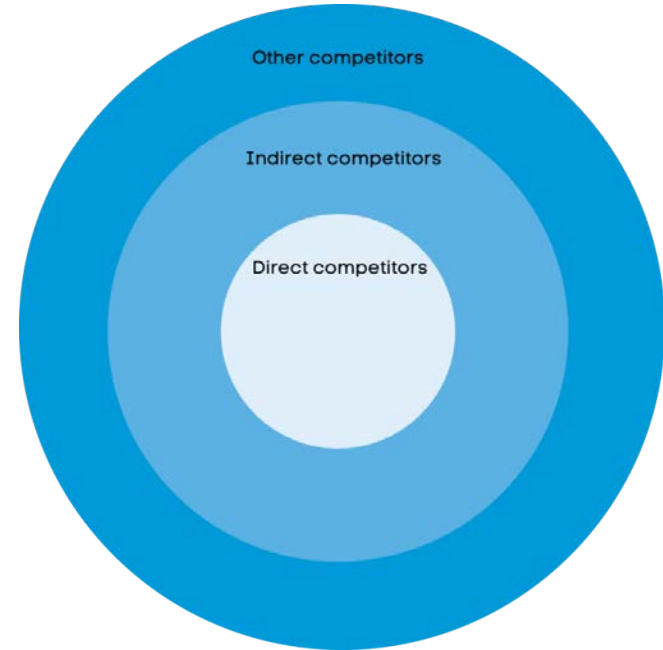
Ownership is Critical

- Marketing is an **internal and external** function
 - Engage your association and its stakeholders
 - Conduct workshops
 - Surveys to test assumptions
 - Guided interviews for qualitative insights
- Take the time to **engage and report** on findings



Know your Competitors

- **Direct Competitors**
 - Offer same/similar products and services
 - Serve similar market segments
- **Indirect Competitors**
 - Offer different products or services but fulfil the same need
- **Other Competitors**
 - Other products or services that fulfil a related need
- **Everyone has competitors**



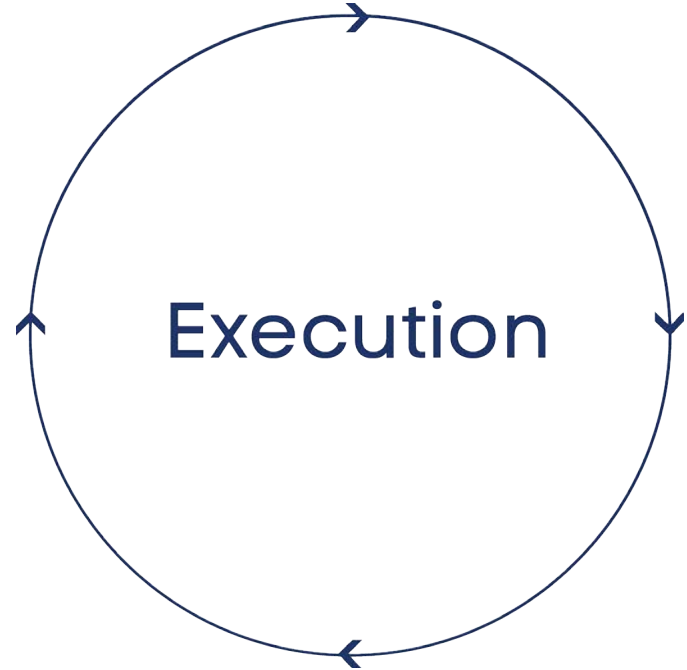
Your Competitors

**Who are your competitors?
How are they a threat?**

Is there scope for collaboration?

Marketing Execution

- The steps undertaken to execute your marketing plan:
 - **Measure outcomes against anticipated results**
 - **Measure impact from each action**
 - **Identify areas of concern**
- Enables **ongoing monitoring**



Planning Leads Execution

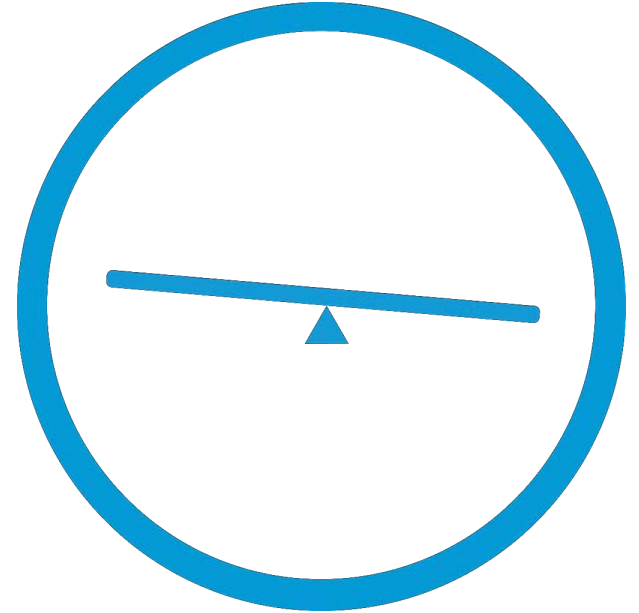
- Branding
- Graphic Design
- Website design and development
- Social media and content
- Events
- Media engagement
- Direct mail

Start with the plan not tactics



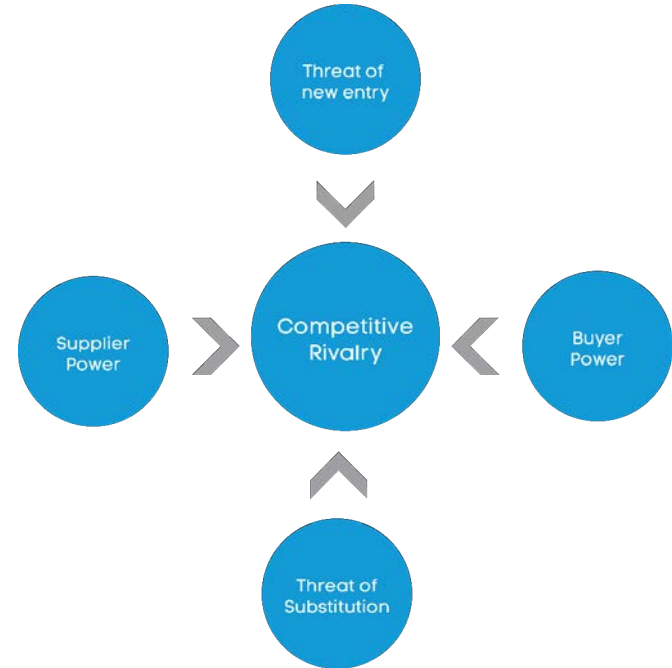
Risk Management

- Marketing intersects with both your **internal and external stakeholders**
- Considers the **opportunity costs** involved with marketing activities
- Considers non-financial aspects of marketing risk



Understanding Risk

- The steps involved in **understanding risk**
 - Identify
 - Assess
 - Prioritise
 - Mitigate and Control
- Not all risk is negative – understand your **risk profile**



Financial Management

- Identify **budget and resources**
- Anticipate the projected return and **how this will be achieved**
- Embed budgets and resources into **implementation schedules**
- Review **outcomes and impact**



Setting Marketing Budgets

- What resources have been **allocated to marketing?**
- What **resources are required?**
- What will happen if the resources are not available?
- What budgets include **marketing components?**



Marketing Responsibilities

Who is responsible for marketing in your organisation?

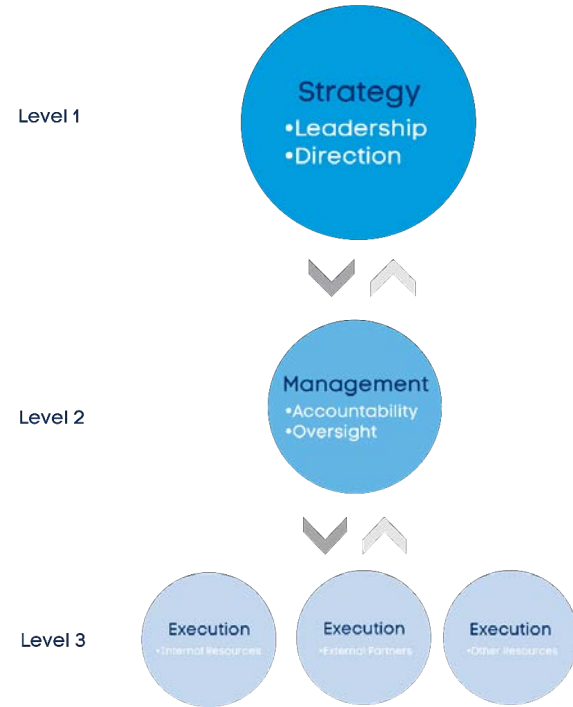
Personnel

- Lead through strategy
- Identify **core personnel** responsible for marketing outcomes
- A vertical function with horizontal responsibilities
- Both **within and outside** of the 'marketing function'



Clarifying Responsibility

- Clear roles and responsibilities
- Strategy (Board and Executive):
Establish **direction and vision**
- Management (Managers):
Confirm **core metrics and ensure oversight**
- Execution (Operational):
Delivers the **required tasks and reports**



Accountability

- Does your marketing plan **align** with your **organisation plan**?
- Know what you **need to measure**
- Consider your **stakeholders**
- Identify the **stakeholder journey**
- Interaction across the **marketing mix**



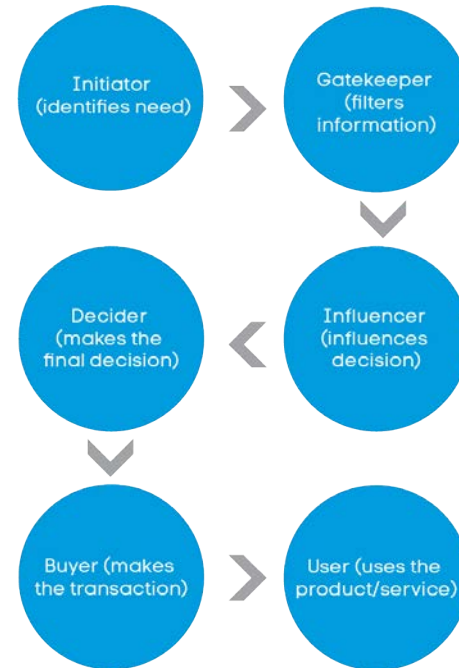
The Decision Sequence

- Otherwise known as the **Customer Journey**
- How do stakeholders **become aware?**
- What information are they **seeking?**
- What is the **commitment process?**
- What **value is delivered?**
- What **impressions** remain?
- Repeat engagement creates **an ongoing loop**



Mapping the Roles

- Who will **interact** with the decision?
- Who **influences the decision**?
- Are there **gatekeepers** that need to be engaged?
- What **touchpoints** are required?
- What **order** is undertaken?



Measuring Marketing Performance

How are you assessing the value from marketing?

Assessing Impact

- Measure **acquisition** and **retention**
- Identify **reporting requirements**
- Identify **expected results**
- Compare with previous data
- Understand reasoning behind variances

Example	Input stage	Input stage	Input stage	Outputs	Outcomes
New Member	Website visitation	Email enquiry	Phone discussion	Member Form	Additional member
New Member	Event Attendee	Member interaction		Member Form	Additional member
Member Retention	Email Newsletter				Lapsed member
Member Retention	Email Newsletter	Website Visitation	Event Attendee	Member Interaction	Member renewal
Brand Awareness	Identify Market	Focus Groups		Survey Results	Market Positioning

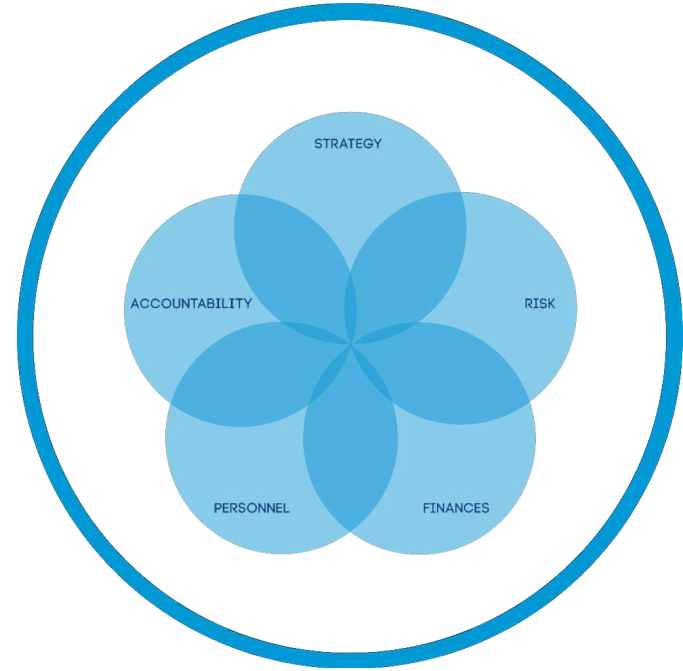
Some Sample Metrics

- Event participation
- Membership retention
- Referral activities
- Frequency of purchase
- Unprompted brand awareness
- Prompted brand awareness
- Have the systems in place to **capture and evaluate**



A holistic approach

- Marketing requires a **holistic approach**
- Marketing is both **internal and external**
- Marketing governance defines the **role and scope**
- Marketing is **led through strategy not execution**
- Marketing **can be measured**



Not all Marketers are the Same

- A professional marketer understands the **scope of marketing**
- Realises that marketing is an enabler for **organisational success**
- Check for membership of the **Australian Marketing Institute**
- Check for **Certified Practising Marketer** accreditation (CPM)



Syneka Marketing

- Finalists in the Australian Marketing Institute's **Awards for Marketing Excellence** (2013 and twice in 2014)
- We are **recognised marketing professionals** speaking at key conferences and events
- Our Leadership Team are **Certified Practising Marketers** (CPM)
- Highest level of professional recognition as accredited by the **Australian Marketing Institute**



Alex Makin

- Associate Fellow, Australian Marketing Institute
- Certified Practising Marketer (CPM)
- Victorian Chair, Australian Marketing Institute
- Committee member: RMIT School of Economics, Finance and Marketing
- Former Mayor and Councillor (City of Maroondah)
- Over 15 years in corporate and not-for-profit marketing and management roles



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