People, Partnerships, and Communities

USDA Natural Resources Conservation Service

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How to Develop a Marketing Plan

Marketing is an important function of any business, organization, or agency. Knowledge of marketing helps your team determine the content of messages, the channels for sending messages, and the types of messages to reach the desired audience. The Conservation Partnership has a variety of important messages and services to deliver to an assortment of customers. Understanding marketing and how to develop and implement a marketing plan is one of the best ways to achieve objectives, priorities, and conservation goals.

What Is Marketing?

In some circles "marketing" still has negative connotations. It is sometimes linked with overbearing salespeople and unethical advertising, or viewed solely as a private sector activity. However, marketing can be a useful process for exchanging products, services, and ideas efficiently in any sector, public as well as private. Marketing is a business tool based, to some degree, on art and, to some degree, on science.

A working definition of marketing for the public sector is, "the process of determining what people want and/or need and delivering it to them."[1] In government, marketing is useful because of the ongoing and widespread exchange of ideas and services, as well as partnership development. Because the government is in the business of serving the needs of citizens, the people are the government's primary customer. The needs and desires of our customers provide the basis for the marketing plan. Simply put, marketing is customer-driven, outward-focused, and changes as our customers change or their needs change.

Why Market?

In addition to meeting customer needs, marketing is important for other reasons. Marketing can promote a valuable product, service or idea, build awareness about an issue or program, or even create or repair an organization's image. We live in an unpredictable and changing world, where forming alliances among groups that share conservation-related interests is important. Competition, accountability demands, and even survival are reasons to market conservation products, services, and results. The steps necessary for your team to reach potential customers, who would otherwise be unaware of what the Agency or district offers, are made clear through the development and implementation of a marketing plan. Here is how to get started.

[1]Pandolfi, Francis. (Dec. 1999). "To Market To Market." *Government Executive* , p. 72.

Create a Marketing Team

Marketing is a team effort that utilizes a variety of people's ideas, abilities, experiences, and research. Before you begin the marketing process, think about which individuals should serve on the marketing team. You should consider people with marketing and/or public affairs experience, cutting-edge information technology skills as they relate to marketing in the Internet, and/or those with significant knowledge of the customer base. The marketing team might include an individual who is knowledgeable about the products and services that will likely be marketed. A "visionary" type person who sees the "big picture" and has the ability to think "outside the box" could also be a good marketing team member. Team members don't all have to come from your agency or district. A team with different expertise and experiences who work together will produce a more comprehensive marketing plan.

Development of a Marketing Plan

In the process of developing a marketing plan, your team selects the target audience or primary customer base; systematically determines their needs; develops key messages, strategies and tactics to communicate those messages to the target audience; and provides a timeline for implementation. The process will require the team to think strategically about some of the challenges you might encounter and how to plan accordingly. It is important to remember that these steps can occur concurrently and do not necessarily operate in a linear process. Although there are a number of ways to develop and implement a marketing plan, we suggest a 7-step process. These steps are:

1. Identify critical issues/needs
2. Develop alliances and determine your role
3. Identify your customers
4. Identify customer needs
5. Develop a strategy and goals
6. Develop and implement the marketing plan
7. Evaluate plan effectiveness

Step 1 - Identify Critical Issues/Needs

A conservation issue is any topic related to natural resources that impacts customers or land use. Examples of critical, ongoing, or emerging conservation issues in your community might include improving water quality in a watershed, increasing outreach activities, animal waste management, or providing educational information to technical service providers.

Every agency and district has finite resources. For some, there might be a lack of funding, while others may lack human resources, technical expertise, or time. Due to limited resources, priorities or critical issues must first be determined in order to set appropriate marketing priorities. Once the team has identified issues consistent with the agency or organizational priorities and have identified the necessary resources, proceed to the next step.

Step 2 – Develop Alliances and Determine Your Role

Working with other groups who have an interest in conservation programs or services is one way to consolidate your marketing efforts. Building alliances enables your team to share ideas and resources between groups, accomplish common goals, and benefit the groups involved. The Conservation Partnership should consider alliances composed of agricultural, conservation, environmental, community service, or other special interest groups. The media, educational, and professional organizations are other sectors with interests in conservation issues. Tips for developing an effective alliance include[2]:

1. Contact community opinion leaders and get them involved.
2. Determine their views about your issues.
3. Talk to community groups that have political influence. Learn their "hot buttons" and positions on key issues.
4. Create a list of key contacts. This list may include organization leaders, media, staff from local or state agencies, or non-profits.

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[2] National Association of Conservation Districts. (1994). "Marketing for Conservation Success." <www.ssi.nrcs.usda.gov/publications/3_Marketing/M001_GuideBooksMarketingConservationSuccess.doc>.

After an alliance is established, determine your team's role and the role of other groups in the effort. Identify the different groups, what they can provide, and how the alliance benefits them. This clarifies the specific role each group can play in the alliance. For example, a community service organization might contribute money or volunteers to a conservation initiative. They might also agree, along with other alliance members, to publicize information about the alliance and its membership in their newsletters.

Analyzing the Marketing Environment

In developing a marketing plan, you must also consider forces outside the agency or district that can shape marketing decisions. Legislation, budgets, and new competitors are examples of outside factors that are beyond the control of the group implementing the marketing plan. Political and legal trends, technological developments, and availability of natural resources can also impact the marketing process. Through a marketing analysis, you need to assess the effect that these factors might have on your marketing activities. How do these factors impact the use of the products and services you offer, how you distribute them, and what do they cost in terms of time and materials? What are the strengths, weaknesses, opportunities, and threats to your program or services in your area, RC&D, field office, or watershed team?

Some teams also find it helpful to conduct a review of their organization before developing a marketing plan, whether they are part of a watershed group or a conservation district. It is always important to understand the internal limitations the team might encounter as you proceed in marketing a new idea or service. In this rapidly changing world, your marketing plan should be fluid rather than static. It is important to modify existing strategies and develop new strategies to deal with changes.

Step 3 - Identify Your Customers

In order for your marketing plan to be most effective, the agency or district must know *who* your customers are. In marketing, there is no such thing as the "general public." Targeted customers must be identified so that your agency or district can more efficiently direct your marketing plan. Use the following information to help define your audience:

- Demographics (age, gender, income, etc.)
- Type of agricultural producer, if applicable (livestock, crop, specialty crop, part-time farmer, renter).
- Psychographics (social class, lifestyle, personality).
- Geographic location (nation, region, state, city). Where do your customers live? You may want to define the geographic areas by watershed, county, city, state, or a region such as the Great Lakes.
- Behavior (adoption rate, user status). How likely is the customer to adopt the service? Do they currently use your service and at what rate? Who in the community has influence on them? Peer pressure impacts how most people behave.

Your customers might be "gatekeepers" such as elected officials. As noted in step 2, agri-business; conservation, environmental and agricultural organizations; professional associations; the media; colleges and universities; and community service organizations are some of the categories of customers and partners.

Step 4 - Identify Customer Needs

A golden rule is to gather information about the customer's needs. Do not develop programs and services based upon your own, the team's, or anyone else's assumptions about the target audience. Beyond the natural resource issues or needs identified in Step 1, what are the specific needs and priorities of your diverse set of customers? They might, for example, need to be better informed about Farm Bill programs or new program updates, technical assistance, financial support, or training.

A marketing environment analysis, surveys, advisory groups, demographic analysis, interviews with local leaders and officials, and focus groups are helpful ways of determining the actual needs of your customers. For example, conducting a focus group is a particularly useful tool for gathering information and clarifying the needs and priorities of an audience. Focus groups are small group meetings of 8-10 participants that enable your team to identify opinions, impressions, and perceptions in a relatively short amount of time.[3] They can be effective at the beginning of a process to identify needs. For more information on focus groups and other information gathering techniques, visit the Social Sciences Institute Web site for a variety of fact sheets on the topics (www.ssi.nrcs.usda.gov). The more information your team can collect on the characteristics of your customers, the more customized the information, services and assistance your team can provide.

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[3] NRCS Social Sciences Institute, 1997. "Focus Groups." *People, Partnerships, and Communities*, vol. 1.

Step 5 - Develop a Strategy and Goals

After the team has identified your target audiences and determined their needs, you are ready to develop marketing strategies and establish marketing goals. Strategies are assortments of tactics and approaches that enable you to attain your team's objectives. The following are different types of strategies:

- Market penetration strategy — present program in existing markets to develop greater customer support. For example: encouraging more customers to sign up for the CRP program by sending a direct mail/e-mail notice is a market penetration strategy.

- Market development strategy – present program to new markets/customers. Notifying local garden clubs about plant fact sheets and the usefulness of this information in native plant gardening could be a market development strategy.

- Reformulation strategy — improve programs for existing customers. For example, providing existing customers with a handout about how to contact technical service providers in their area is a reformulation strategy.

- Market extension strategy – modify an activity to reach new markets/customers. For example, making changes in your field day program to attract a broader audience. Using e-mail to send invitations to new or potential customers and community leaders could also be a market extension strategy.

- Replacement and extension strategies — replace a program with an improved version of the same program or increase the range of services offered. For example, replace a RC&D annual meeting program that is attended only by council members with a new one. Invite partners, customers and potential customers, and local officials to attend the event. Provide an opportunity before, during, or after the meeting for council members to meet the guest speaker.

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- <u>Diversification strategies</u> – present a new program to new customers. Providing new information relating to a Farm Bill program to local Native American tribes and bands or to limited resource farmers if they previously weren't customers could be a diversification strategy.

Building or Improving Your Organization's Brand Identity

The development of 'brand identity' is an important component of any marketing plan. In many ways, brand identity is a simple game of word association. For example, when one mentions the automobile manufacturer BMW, the words "elegance," "style," and "safety" may follow. A customer's perception of an organization is what constitutes that organization's 'brand identity.' In the same way that an agency or organization can have a positive image, it can also have a negative image—or none at all. Below are three steps you can take to build or improve your organization's brand identity, whether you are a district office or an RC&D council.

1) Develop a Niche
Understand your strengths and weaknesses. Where does the agency or organization excel? Determine what makes your group unique. Analyze your competition and their strengths and vulnerabilities. Use this information to develop a brand identity that will set your agency or organization apart from the competition, generate recognition, or improve your reputation among a specific customer base.

2) Communicate Identity
Once you have determined your niche, develop specific communication strategies to "communicate your unique identity so the right people know you, value you, and most of all, support you."[4] An example of communicating identity would be to publish your success stories through news releases, newsletters, or your Web site, when applicable.

3) Consistency
Consistency is critical in building brand identity. Anything associated with your organization or agency communicates to your customers—from promotional materials like newsletters, brochures, or press releases; signs; Web site; or even the way phones are answered. Inconsistencies lead to confusion about who you are and what your organization or agency offers. Creating a style guide for your organization that defines specific letterhead, logo, or font usages, organizational color schemes, page layout guidelines, key messages, etc., is a good way to ensure consistency. The Natural Resources Conservation Service (NRCS) home page has guidelines for NRCS logo usage at www.nrcs.usda.gov/about/logo/.

[4] Engelberg, Moshe, 2002. "Building Brand Identity." *Government Executive*. p. 82.

Step 6 - Develop and Implement the Marketing Plan

Once the team has compiled its research and chosen its strategy, it may begin developing its overall marketing plan. This consists of developing action programs. Action program guidelines provide a written description of:

1) Each target market, program, and key message(s)
2) Customer needs in each target audience that will be satisfied by the activities or programs
3) Objectives for each target audience and for each program
4) Establish benchmarks, or points of reference, from which measurements may be made.
5) The marketing plan (messages, products, for each target audience)
6) Performance standards based on such broad criteria as effectiveness, efficiency, and equity.
7) Key elements of success such as a increasing the number of partners in a watershed initiative.
8) Promotional materials needed (brochures, newspaper articles and other materials)
9) Third party endorsements (a customer that is willing to be quoted saying something positive about a program or how a program helped him/her.)

After the action program is developed, a timeline that identifies specific steps or objectives and provides target dates to accomplish objectives and goals should be written. This will serve as your team's implementation guide throughout the process.

E-mail Marketing

Marketers in every industry are embracing the use of e-mail in attaining their marketing goals. E-mail marketing enables efficient communication with a larger number of customers at a lower cost both monetarily and in time. The recent surge in e-mail marketing has made crafting useful e-mail messages that attract customer attention more difficult because of the prevalence of SPAM, unwanted e-mail. It is forecasted that SPAM will soon overtake HAM, desired e-mails. The following are items to be considered when communicating and marketing to customers through e-mail.

Subject Lines:
These need to be compelling and grab attention. Start with a provocative statement or questions. Always review previous subject lines you have sent to avoid repetition. Additionally, consider sending different subject lines to different groups or segments of customers.

Message Content:
Use multiple and different calls to action throughout the e-mail. Provide contact information that is easy to use. E-mail enables immediate customer response to your message.

From Line:
The origination of all messages from your organization should be directly connected to your organizational brand identity. When a customer receives an e-mail, they should recognize instantly the organization's name or contact person and associate it with a product or service. Once a source is selected, it should be used consistently for quick recognition by your audience.

The Closing:
End with a strong benefit to the customer. Too many e-mails simply summarize instead of providing a strong reason or deadline for taking action.

Internet Marketing

Here are a few tips to consider before marketing your organization on the Internet. Be aware that your state or national organization/agency may place restrictions on content, layout, and color schemes to establish consistency. Build the Web site from the assumption that the average viewer has an older computer and a slow internet connection. The longer it takes for the viewer to load your webpage, the more likely they are to lose interest and cancel the page load completely. What does this mean?

Keep it simple. Pages with lots of color, text, and especially images typically take longer to load. Choose a few significant graphics or images instead.

Make it easy on the eyes. Use a color scheme that is aesthetically pleasing. Nothing is harder on the eyes than red text on a black background. If you have questions about color schemes, contact your public affairs specialist or visual information specialist for recommendations.

Organize the information. Use the home page to break down your information into logically organized categories. Always assume the viewer knows nothing about your organization when creating those categories.

Consider Accessibility Issues. Web sites should be accessible for those with disabilities and satisfy Section 508 Federal requirements. For more information on accessibility guidelines, consult The Access Board's Web site at http://www.access-board.gov/.

Update regularly. A neglected Web site will only promote disinterest. Update with news, interesting tidbits, and new features.

List contact information. Provide a way customers can contact you regarding any questions or concerns they may have.

Utilize customer feedback. Provide a "user feedback" section on your Web site where your viewers can comment.

Step 7 - Evaluate Plan Effectiveness

After your marketing plan has been implemented, it is important to compare changes between your team's benchmarks and actual results. With this type of comparison, the team can evaluate successes and identify areas in need of improvement. Examples of evaluation questions to answer might include:

- What strategies or activities were successful and which ones were not?
- What was learned from customer feedback?
- Based on the feedback, how might the team improve the marketing plan?
- Did the team fulfill objectives and goals or meet the identified need?
- Have other needs emerged?

For example, if your team's objective was to target and reach a specific number of customers with invitations to attend a district's field day, it is important to assess afterward who came and how they heard about the meeting. Consider a sign-in sheet that enables you to gather contact information on attendees and also determine how they heard about the meeting. Did they receive an invitation, read about the field day in the newspaper, or hear about it from another person? This will give your team specific feedback on the channels that were successful in reaching your customers.

This step may require your team to re-evaluate any or all of the previous steps. Adjustments are usually necessary. Be honest. Rarely does a marketing plan make it to this step without identifying areas with room for improvement.

In today's world of tight budgets, diverse customers, new and powerful technologies, and increases in competing messages, we must be more creative in the ways we communicate. A marketing plan is an important tool for The Conservation Partnership to utilize. It enhances the transfer of technology, information, and services to constituents and can also facilitate the development of alliances among community groups. Marketing enables us to understand and more effectively meet our customers' needs.

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Where can I find more Information?

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