**Marketing & Outreach Planning Worksheet**

Using this document, we’ll prepare a basic Marketing and Outreach plan for the organization. Note, you may wish you complete a separate marketing plan for each of your programs or services, particularly for events and services that might connect with people your organization might not ordinarily connect with.

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**Step 1: Consider Your Budget**

How much are you planning to spend on general marketing and outreach? Do you have lots of money for this in the budget, or is it smaller to start?

**Step 2: Consider Your Strategies**

Based on what you can afford, what are the best strategies for your business or organization? Here are some common strategies to consider, though there are many other ways to reach out.

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| --- | --- | --- |
| General Audience | Targeted Outreach | Community Partnerships |
| * Newspaper Ads * Bus Ads * Radio Spots * Television Ads * Social Media * Word of Mouth * Direct Mail * Email Campaigns * Google Ads (or similar) * Billboard * Press Releases * Brochures | * Direct emails to people and community organizations * Flyers in specific locations * Email marketing campaign to your list or other lists * Targeted Direct Mail Campaign * Sponsorships or Event Presence | * Membership in other groups or organizations * Presentations to other groups and organizations * Partner referrals * Your link on other websites |

**Step 3: Make a Plan (Sample)**

Here, you’ll want to consider what strategies you’ll use, who will be responsible for carrying them out, and who will be responsible for any graphics or design work that might be needed. If necessary, you might also want to include any policies regarding notification, submission and turn around time.

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| --- | --- | --- | --- |
| Strategy | Responsible | Graphics & Design | Status |
| Implement New Press Release Each Month | Executive Director | N/A |  |
| Implement Annual Billboard (1) and Bus Stop (3) Campaign in June | Advocacy Director | Platform Committee Volunteer |  |
| Distribute Flyers to the Library, Social Services, and Department of Health each month. | Mental Health Services Manager | Mental Health Services Manager |  |

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**Step 4: Make a Plan (Your Turn!)**

|  |  |  |  |
| --- | --- | --- | --- |
| Strategy | Responsible | Graphics & Design | Status |
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**Step 5: Complete and Save!**

We’ll add this to your Operations Manual!