
Writing an Association Marketing Plan That Really Works

Jim Pealow, managing partner of Association Management, Consultants & Evaluation Services, says many associations are just now beginning to see the value of a comprehensive marketing plan.

"It's unique to actually find a marketing plan in an association," says Pealow, who has worked with more than 30 associations over the past three years.

Why don't more associations have marketing plans in place? Pealow says that there are a variety of reasons, including the lack of competency in the field, not having one person responsible for marketing, and marketing simply being low on the priority list.

Most associations undertake a membership recruitment drive at one time or another. It's usually during this process that association executives come to the realization that their association doesn't have as many members as it should, because it doesn't have enough or the right kinds products or services to offer its members.

It's when they delve into their products and services that most associations discover the need for some sort of marketing plan. But where do associations go from there?

How an association deals with marketing usually depends on the size of the organization. Larger associations often have the resources to put an individual in charge of marketing, while smaller associations are forced to outsource their marketing needs. This allows them to adopt practices which have proven to be successful for others.

Things are changing, and through his work as lead instructor for the Canadian Society of Association Executives - Association Management Education Course, Pealow says he sees marketing becoming a priority with association executives.

In addition to marketing, an association should also have a communications plan. "That way you tie together the critical elements," says Pealow. "Those elements being communications, recruitment of members, products and services, marketing, advocacy, all aspects. Everything's linked, so the left hand knows what the right hand is doing."

Pealow adds that some associations engage in marketing activities, but without a formal plan he says, they are missing out.

"They aren't looking at their total allocation and their returns on the allocation. Having a marketing plan allows you to allocate your resources in a thorough manner and not neglect any one particular area."

The first step in creating a marketing plan is for the association to decide why they want a plan and to figure out how it will meet their strategic needs. In order to do that, information must be collected which indicates what's happening within the association, including current direction, products and services, member recruitment, communications, operations and the market.

Next, the association must look at the current situation in several different areas. Executives must ask themselves, 'Are there any political, technological, social or other trends or issues that are a going to have an impact on the association in the external environment?'

They must also consider any strategic issues affecting the association, as well as their current marketing situation, if it exists.

The competition also needs to be assessed. "Some associations don't admit they even have competition," explains Pealow.

Competition can come from other associations, educational institutions or the private sector, and the association must be willing to adjust to these things.

When assessing the current situation, Pealow stresses that associations must look at member needs as well. Many associations don't survey their members, thinking it can only be done by spending large amounts of money to hire a consultant when, in fact, techniques such as fax-back surveys and telemarketing can achieve similar results at substantial savings.

When assessing member needs associations should ask:

- Who are the members?
- Who are the potential members?
- What are the traits of members?
- What are the traits of potential members?
- What are the current needs, wants and perceptions of members?
- What are the current needs, wants and perceptions of potential members.

Other questions associations should consider when assessing the market situation include:

- What does the competition charge for products and services?
- Which other associations do members belong to?
- How many members purchase products and services from other associations?
- What publications or sites do members read? How often?
- Which conferences/seminars/courses do members attend?
- What are the strengths and weaknesses of the current products and services?

"Once you look at what's happening in terms of your current situation and the marketplace," continues Pealow, "You look at what opportunities and issues exist."

He refers to opportunity and issue analysis using the model of strengths, weaknesses, opportunities and threats (SWOT). Using this model, associations must look at their communications, products and services and member recruitment.

It is also important for associations to look at any barriers which might exist in terms of their opportunities. For example, an association may wish to do something in the area of technology, such as sending a monthly newsletter via e-mail, but since many members don't use computers on a day-to-day basis, this opportunity is limited.

Now that the association has looked at where it is in the marketplace, it is time for them to decide where they want to be. In other words, the desired marketing position.

"What do you want done?" asks Pealow. "Do you want improved market share, do you want to improve your communications with your members?"

The association must establish performance levels and set the desired situation, such as wanting at least all of your members accessing one product or service at least once per year.

If offering a new service, the association must have an effective marketing strategy to ensure they achieve the required level of participation. It is not enough to simply advertise in your monthly newsletter that a new service is available to members.

Some useful approaches to marketing new services are:

Market Segmentation

In any service delivery setting, there will always be one group of members which is more likely to use a new service. A key challenge for association executives is to segment their membership and focus marketing efforts on those members most likely to use the service.

Message Layering

Associations that market new services often choose a one-time mail-out or placement of a service description in their newsletter. Successful marketing requires that the message outlining services needs to reach members more than once to influence decision making.

Member-based Marketing

Members can be effective marketers of new programs or services. Where possible, these members should be used to disseminate this message.

Partnership-based Marketing

Recruit partners to help you market the service. For example, a company that is helping you to supply a particular service has a direct financial incentive to help you market the service more broadly.

Once that is done, in most cases the association realizes there is a gap between where they are (the current situation) and where they want to be. Taking into account the opportunities and issues already established, the association must now create a strategy to close the gap.

Strategies for achieving desired market position may include investing in a professional firm to undertake a major recruitment effort in contrast to what was done the previous year, or creating a new product in the area of knowledge management, which meets the needs of members.

What is required next is an action to support the strategy. Many associations don't follow through and they don't put down in writing the specific action, which is who is going to do what, when, where and how. Without these guidelines, implementation of the marketing plan is almost impossible.

Some things to keep in mind for supporting marketing strategies:

- Focus on superior value
- Retain current members by continually exceeding expectations
- Focus on innovation, extraordinary service, efficient complaint handling, and building long-term relationships.
- Dig deeper to find out not just wants, but real needs.
- Offer total guarantees
- Flexible offerings by segments
- Know the value of a member: acquisition costs and lifetime value
- Recognize that you are in the solutions business not product/service/selling

In implementing the action plan it is also important for the association to assess their sales competency. If the association doesn't have the staff with these skills it may be better for them to outsource the work to achieve these competencies. Trying to get by using volunteers or staff who don't have the required skills will impede the success of any marketing plan.

In implementing a marketing plan, associations must decide if they have the resources internally as well as the requisite knowledge and skill. They also have to look at the resource impact of their marketing strategy in terms of finance, people, equipment and processes. One of the most important aspects of developing and implementing a marketing plan is accountability:

- Who will do it?
- When will it happen?
- How much will it cost?
- How will we monitor and measure results?

Pealow says using performance indicators is the best way to go. These indicators, however, must be tied into the regular reporting and evaluation process of the association. He adds that associations have to benchmark. They have to look at successful and high performing associations and find out what practices they use which produce results. "The implementation of

a marketing plan will only be successful if there is focus on accountability and results," remarks Pealow.

"Marketing plans just have to make sense," says Pealow. "They don't have to be hundreds of pages." Broken down it's rather simple: where the association is currently in the marketplace; where they want to be; how they're going to get there; how they're going to measure their progress and who is going to be responsible?

John Tenpenny