DRAFT

Marketing Action Plan

# Introduction

Following the 2016 ABM marketing project that identified various opportunities for development of marketing and fundraising tactics, this Action Plan seeks to outline the chosen priorities and develop detailed procedures, timelines and budget allocations.

Priorities have been delegated by the Communication Team’s annual planning day. Each priority outlined below notes a deadline and approximate budget. Some specific priorities require a more detailed strategic plan produced and this is noted where necessary. A full Gantt chart and budget summary are also compiled at the end.

# Priorities & Actions

Priorities and actions are noted in approximate date order but please consult the full Gantt Chart for an overview of deadlines.

**Recommendation #2 Infographic Resource**

*It has been identified that some stakeholders would benefit from a new resource that clearly but simply highlights the work of ABM or explains the complex nature of some of ABM’s work. It is recommended that an info-graphic be developed. (See example in Appendix B). This tool will simplify ABM’s complex messages and may also appeal to a younger audience. It could be shared electronically and as a hard copy flyer.*

Actions

* Draft copy for the infographic
* Brief Graphic Designer
* Design approved
* Electronic copies and printed copies made available

Deadline: To print March 31, 2017

Responsible: Christopher Brooks

Approx Budget

* $500 printing
* $XX design costs

**Recommendation #4 Speaker Program Administration Review**

*Many of ABM’s stakeholders may be used as, or interact with, ABM speakers. Feedback from different audiences indicated they would like more ABM speakers or, that as an ABM speaker they would like more training and presentations made available. While there are many challenges in sourcing quality speakers and tracking speakers, it is recommended that the Speaker Program administration be reviewed by the Communication team and tools such as speaking presentations, training, feedback and donation tracking be further developed. This may not require new resources but simply existing tools being presented to potential speakers in a different format as a training package. This may encourage new speakers as well as motivate existing ones.*

Actions

* Detailed review and gap analysis of all current Speaker Program paperwork as us currently being undertaken by Jess and Michael. Ie: application forms, feedback/thank you forms, presentation offerings, training material.
* Produce any new forms or training material required (note: this may be a bundling of updated material to supply to speakers eg: new videos, infographic with the existing speaker material)
* Ensure all known speaker presentations are logged against a Parish in Raiser’s Edge each month
* 6 monthly reports supplied to track any donation correlation to speaker engagements (Trong)
* Annual review of correlation to form the 2018 Speaker Program plan. Ie: what is the financial return on investment.

Deadline: New paperwork in circulation by March 31, 2017. The rest is ongoing.

Responsible: Michael Robinson

Approx Budget

* NA – in house staffing and printing

**Recommendation #6 ABM Associates’ Welcome Pack**

*ABM’s Associates pay a fee as an “expression of commitment to ABM”. It is recommended that as part of this commitment, the Associates be encouraged to market ABM further in their own circles. Associates should receive a welcome pack (electronic or hard copy) upon payment of their fee which could include resources to both inform them and be shared with others. As with the above speaker tools, these may simply be existing resources like videos, flyers and the new info-graphic that can be packaged as an Associate Welcome Pack.*

Actions

* Source current Associate information from Karin and complete review and gap analysis of all current Associate communication. Ie: application forms, welcome letter.
* Create new procedure for the “on-boarding” of an Associate. Information must be shared between Administration and Raiser’s Edge.
* Produce a new welcome letter for Associates that indicates there is a commitment to promote ABM’s work using the enclosed materials.
* Bundle any material required for the Welcome Pack (note: this may be a bundling of updated material to supply to speakers eg: new videos, infographic, poster, latest Partners with Project Book and Prayer Diary)
* Ensure Associates are logged in Raiser’s Edge to capture full view of supporter and that mailings are controlled.

Deadline: New welcome pack in circulation by March 31, 2017\*. The rest is ongoing.
\*This is dependent on the procedure of Associates’ renewal. If this occurs at a certain time of year, rather than in an ongoing manner, the Welcome Pack will be introduced at the next renewal to minimise costs.

Responsible: Christopher Brooks and Committee Support Team Member

Approx Budget

* NA – in house staffing and printing

**Recommendation #7 Investing in Bequests**

*It is recommended that the new bequest tools mentioned in this review be rolled out by the Communication team to existing donors and supporter parishes. For further growth, the bequest material could also be distributed to Anglican retirement homes and all parishes. These tools should not stand alone but form part of a bequest strategy, which may also include an “In Memory” component, developed by Communications as a key part of the strategic marketing plan.*

Actions

* Update website with new bequest material
* Distribute new bequest material to anyone identified in Raiser’s Edge as a bequest prospect (assuming this information is available, otherwise it will be determined as part of the Bequest Plan).
* Working group consisting of Mike, Trong and Liz to develop detailed annual Bequest Plan for implementation in the 2017-2018 financial year.

Deadline: New material in circulation by March 31, 2017. Bequest action plan complete by June 30, 2017. The rest is ongoing.

Responsible: Michael Begaud

Approx Budget

TBC – input from Mike?

**Recommendation #12 Online Donation Page Enhancement**

*It is recommended that the Communication team continues to assess how the donation part of the website can be enhanced. Suggestions include the use of images and a thank you video (a specific video thanking donors following their gift). It is acknowledged, the technology constraints present challenges in this space.*

Actions

* Investigation into Raiser’s Edge and Net Community’s capacity to integrate and have images displayed and the simplicity of the project drop down menu. (Chris did you say some of this has happened or is underway?)
* Execution of possible changes
* Production of a specific donor “thank you” video that can be placed on ABM’s website and donors’ redirected to this page when they complete donation OR, the link can be sent in the receipt/thank you email. Note; this can be as simple as some photos, music and text edited in-house (perhaps by Education team?) or, a budget can be invested in this tool.

Deadline: Possible changes and in-house video executed by April 2017. (May not be achievable, pls change if needed Chris)

Responsible: Christopher Brooks and Vivienne For

Approx Budget

* Video production?
* Website changes?

**Recommendation #15 A Topical Appeal Trial**

*That, in conjunction with the above point, a higher level topical appeal is offered once a year (initially for comparison purposes). For example, water or education or gender empowerment rather than the specific project be used and the fundraising income received be used across relevant projects as determined useful by the programs. This may be most effective when connecting with a younger more modern audience segment.*

Actions

* Planning for the 2017 Tax Appeal can include this topical trial.
* Administration / Raiser’s Edge processes to be developed to facilitate this trial.
* Following the appeal, comparison to last year’s water appeal and the last five year’s tax appeals should take place. (Trong)

Deadline: April 31, 2017 or May? When does this need to be ready for Tax Appeal?

Responsible: Christopher Brooks and Michael Begaud

Approx Budget

* NA existing staffing resources and appeal budget

**Recommendation #17 Communication and Reporting to Donors**

*That reporting back to donors on project outcomes is improved. Currently updates are done on the website but it is recommended that through improved use of Raiser’s Edge, individual supporters could receive project updates, success stories and follow up donation requests directly to their inbox. There is also potential to vary the media used to share such updates through the use of more video. These updates should be cross communicated across ABM’s other media such as Facebook and the website.*

Actions

* Specific communication updates continue to be completed by Jess
* Recent updates get emailed to any ABM supporter who gave to the project in the last 12 months, thanking them for donation and providing updated
* Updates get shared through other communication tools, such as Partners, social media and website as usual
* ABM staff are encouraged to film short videos (even on phones) that can be used an updates to supporters with some in-house editing (Chris, I can remove this if the skill set doesn’t exist)
* That the Donor Marketing Tactic Review section of the original Marketing Report be reviewed by the Communication Team and any chosen implementations be planned for adoption in 2018.

Deadline: June 30, 2017 and ongoing

Responsible: Who would you like this to be Chris – Jess and Viv?

Approx Budget

* NA existing staff resources and infrastructure

**Recommendation #8 Growth through Major Donor and Philanthropic Development**

*It is recommended that research be undertaken to consider if major grants and philanthropic trusts be a viable fundraising option for ABM. The classification and recognition of ABM’s existing major donors is also a worthwhile investment from which to grow income. If ABM receives PBI status this may assist with growth in this area.*

Actions

* Internal Research with Program Heads to create audit of what grants and trusts are being access and by who, throughout ABM.
* Define which opportunities are worthy of further investment.
* Outline ABM’s organisational-wide approach to philanthropy and allocate necessary resources and action plan.
* Map the current communication touch points with Major Donors and develop new Stewardship Plan. (Fundraising Working Group – Chris, Mike and Liz)

Deadline: June 30, 2017

Responsible: Christopher Brooks and Jessica Sexton

Approx Budget

* Chris, did you say this has been budgeted for? Please advise figure here if appropriate.

**Recommendation #20 Grants and Philanthropic Trust Research**

*That Grants and Philanthropic Trust be investigated by the Reconciliation team. This must be done in conjunction with Recommendation 8 to ensure a consistent approach across the organisation.*

Actions

* In conjunction with the above, the Reconciliation Team to research specific opportunities for major funding opportunities.
* Research fed into the organisation-wide approach documentation outlined above in Recommendation 8.

Deadline: June 30, 2017

Responsible: Christopher Brooks and Reconciliation Team

Approx Budget

* NA

**Recommendation #9 Re-engaging Lapsed Donors to see Growth**

*It is recommended that lapsed donors be communicated with to re-engage their support. It is much easier, and the return on investment much higher, to activate past supporters than develop relationships with new supporters. Phone calls and written communication, as noted above, are tools to assist ABM reconnecting with lapsed donors.*

Actions

* Identify ABM’s lapsed donor definition
* Map the current communication touch points with lapsed donors
* Develop new Stewardship Plan.

Deadline: June 30, 2017

Responsible: Fundraising Working Group – Chris, Mike and Liz)

Approx Budget

* NA

**Recommendation #10 Implement a Regular Giving Program**

*It is recommended that ABM harness the supporter loyalty and engagement that exists to develop a Regular Giving program. Whilst initially such a program can seem to reduce Appeal income, Regular Giving pledges generally return larger donations overall and also offer planned giving to assist with budget forecasts and future income stability. Note; ABM’s complex tax-deductibility on various projects must be considered for this program.*

Actions

* Research sustainability of program by identifying donor segments who may be interested in a Regular Giving Program eg: younger, those who give smaller amounts semi-regularly
* Draft Regular Giving Strategy that outlines expected ROI, measurable objectives and evaluation timeframes.
* Develop collateral and define programs to support
* Send Regular Giving material to identified target audiences (considering a gap in the appeal schedule)

Deadline: Research complete by June 30, 2017. Program commences in line with Financial Year if sustainable.

Responsible: Fundraising Working Group – Chris, Mike and Liz

Approx Budget

* $500 for collateral
* $500 for mailing
* $XX for design

**Recommendation #21 Centenary of the Good Friday Gift**

*That to showcase the unique relationships in the Church to Church program and promote the program, the Centenary of the Good Friday Gift should be celebrated (in 2018).*

Actions

* Communication and Church to Church teams to decide what promotion may be included to celebrate this occasion and ensure budget is allocated in 2018.
* Planning to commence for 2018 as required.

Deadline: June 30, 2017 and ongoing planning

Responsible: Christopher Brooks and Robert Maclean

Approx Budget

* Planned for 2018 based on above discussions

**Recommendation #16 A Targeted Approach to Appeal Communication**

*That a more targeted approach is taken to appeal communication. Currently many ABM supporters receive all appeal requests despite their demographic. This recommendation is two phased as more demographic data is required in Raiser’s Edge which can be achieved by washing the data from external sources. The second phase is to implement a more targeted approach based on those demographic or interests findings.*

Actions

* Quotes sourced to determine costs associated with washing ABM’s data from external sources
* Decision made as to whether this is a cost effective and useful tactic (by June 30?)
* Following a decision about data washing, a donor survey be released to gather more information about donors interests (this should be done following any data washing but can also be done without data washing) (Liz)
* Administration / Raiser’s Edge processes to be developed to facilitate targeted communication based on demographic and profile data (phase 2 in 2018)

Deadline: November 30, 2017

Responsible: Trong Hieu Le and Christopher Brooks

Approx Budget

* TBC, based on quotes
* Survey - $200 mailing and online

**Recommendation #14 Appeal Planning and Analysis**

*That the process and timeline of aligning appeals to projects be reassessed to ensure appeals and projects are matched to be more topical and timely. Consequently Communications will have the resources and ability to source the appropriate human interest stories from partners to ensure an emotional connection to the appeal. This recommendation also connects to the findings in the Donor Marketing Tactic Review which notes the large number and cost ratio of appeals. Refined planning and analysis of the cost ratios will allow for strategic decisions to be made about the number of appeals.*

Actions

* Chris I think I might need to talk to you further about what is already done before I note this in detail

Deadline: September 30, 2017

Responsible: Christopher Brooks

Approx Budget

* NA existing staffing resources

**Recommendation #3 Diocesan Representatives Conference**

*It is evident that the Diocesan Representatives Conference is a key tool to communicate with the representatives and is highly valued by this audience. It is recommended that this conference continue to be used as a significant marketing tactic and as part of the conference, representatives be further resourced with tools they can take back to their dioceses. Eg: posters, videos on usb and the new info-graphic. Some representatives also indicated they would find general marketing education useful such as speaking tools (see Recommendation 4) or social media education and such teaching could be a part of the conference.*

Actions

* Agenda planning for the 2017 conference includes an opportunity for a “Marketing Education” session.
* Some suggestions include: How to help promote ABM or Engaging Ways to Speak about ABM in your networks or How to use Social Media to promote ABM’s work.
* Attendees at the conference receive an ABM Promotion Toolkit including existing resources such as posters, the new infographic, current videos on usb, latest editions of Partners etc.

Deadline: 2017 Conference, XX DATE

Responsible: Christopher Brooks and Committee Support Team Member

Approx Budget

* NA – usual Diocesan Representative Conference budget.

**Recommendation #19 Regular Giving Resources**

*That, in conjunction with Recommendation 10, a Regular Giving Program be developed and positioned to particularly target younger modern Anglicans. As a part of this program an additional resource or incentive, like prayer cards or similar, could be offered to donors in this program*.

Actions

* Brainstorm resources that can be offered as further incentive to the Regular Giving Program.
* Design resource or develop electronic schedule
* Implement resources following launch of Regular Giving Program

Deadline: December 31, 2017

Responsible: Fundraising Working Group – Chris, Mike and Liz and Brad Chapman?

Approx Budget

* $500 to $1000

**Recommendation #22 Church to Church Rename**

*That the Church to Church program consider a rename, to better reflect its true work and position its projects more appropriately in the minds of supporters. Name suggestions should be workshopped and tested in key market segments before implementation. It is also recognised that this decision feeds into the broader strategic plan of ABM and the programs focus on partnerships and relationships so it is suggested, timing may be linked to broader decisions.*

Actions

* Initial discussions with internal stakeholders including the Partnerships Team, Managers, to determine
* Following the organisation wide Strategic Planning process, this recommendation can be tabled as a priority.
* If proceeded with, the new name must tie directly to the key messages recommendation and the work done in those workshops
* Name suggestions should be tested with donors and supporters and final recommendation put to the Board.

Deadline: Decision made as to whether a rename will take place by December 31, 2017

Responsible: Christopher Brooks and Partnerships Team

Approx Budget

* TBC – Chris is there anything printed with this name that would need a reprint and budget allocated?

**Recommendation #23 Resources**

*That the Education team work closely with Communications to develop more resources and ministry tools that can be promoted and shared with supporters and clergy to coincide with appeals and key seasons. This will act as incentive for the target markets to become familiar with ABM’s work and support the cause, consequently positioning ABM as the preferred Anglican mission agency, grounded in partnership, advocacy and justice.*

Actions

* A resource calendar be produced for 2018 that sets out ideal resource development
* This research to include budget forecast and delegation of resource development between the Education and Communication teams
* These conversations should be done in conjunction with discussion about Regular Giving Resources.
* New resources introduced in 2018

Deadline: December 31, 2017

Responsible: Christopher Brooks and Education Team

Approx Budget

* Chris, I welcome your input re: what Lent Appeal resources cost or we can just add approximate here eg: $5000

**Recommendation #11 Growth of New Donors through Emergency Appeals**

*It is recommended that Emergency Appeals be used as acquisition campaigns to harness support from nominal Anglicans throughout the broader church. Growth success is proven by the example of the 2015 Vanuatu Emergency Appeal.*

Actions

* Analyse the response rate to the Fiji Appeal Update in late 2016 (Trong)
* All new donors to the next Emergency Appeal receive a tailored communication, via mail or email depending on mail preferences, reporting on outcomes 2 to 3 months following the donation.
* This communication to include a “soft” donation ask to another program related to that country or region or Disaster Risk Reduction etc.
* Analysis of response rate of second communication (Trong)
* New donors to be integrated to ABM’s other communication channels

Deadline: \*Next Emergency appeal – date unknown

Responsible: Christopher Brooks

Approx Budget

* $300 mailing costs

**Recommendation #25 Key Messages**

*It is recommended that the outlined key messages be workshopped, as a priority in ABM’s marketing strategy, so that consistent communication can be utilised across all marketing and communication tools.*

Actions

* Key message brainstorm with Communications to be summarised into a document that is a starting tool for Chris to have conversations with Senior Staff.
* Consultation sessions with key Department Heads to form key message recommendations.
* Key messages endorsed by ABM (This could be board or just leadership)

Deadline: After the 2017 Strategic Plan is released – Chris is there an approx. date I can put in Gantt chart?

Note: This recommendation was originally scheduled for the 60 day timeline but it has been requested that key message workshops follow ABM’s Strategic Planning process.

Responsible: Christopher Brooks and Department Heads

Approx Budget

* NA

**Other Recommendations**

The following recommendations were chosen as lower priority, are completed or simply noted, so actions are not required this calendar year. They are listed here and in the appendix to ensure future planning may encompass such work.

**Recommendation #13 New Audience Opportunities**

*It is recommended the below audiences are workshopped and prioritised by ABM’s Communication team so that the recommended tools and tactics can be developed and actioned in the Strategic Marketing Plan in the following 12 month period.*

* 2018 Priority

**Recommendation #18 Logo Refresh**

*That a logo refresh, which has the potential to rejuvenate ABM’s brand to existing and new audiences, be seriously considered based on the internal and external feedback received. The timing of implementation should ensure a consistency of the logo roll out across annual publications, online and hard copy publications.*

* Already complete

**Recommendation #1 Committee Structure**

*Whilst the committee structure could certainly be streamlined to improve efficiencies, it is recognised this is almost impossible for management to do given the voluntary nature of the committees and the history behind each diocese’s establishment of its group. Therefore, it is recommended the committees continue to receive communication as is currently the practice and consequently, they will continue to be used as engaged, useful local resources.*

* Noted

**Recommendation #5 ABM Auxiliary**

*The Auxiliary is a reasonably effective fundraising group. Feedback indicated that the Project Kit for the Auxiliary project is well presented and useful so it is therefore recommended that these tools be continued.*

* Noted

**Recommendation #24 Schools**

*That unless schools are chosen by ABM’s leadership as a strategic priority and the necessary investment allocated, marketing and fundraising resources be used in a limited way to connect with this target audience.*

* Noted

# Gantt Chart

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# Budget Summary

Chris I will have to complete this when you have advised the gaps or of course, you can add up in my absence.

# Appendix

The below was included in the timeline summary of the original Marketing Report and is included here for easy comparison reference, should it be required.

**60 day actions**

* Stakeholder engagement recommendations including enhancement of Speaker’s program administration and monitoring, the development of an info-graphic resource and a new ABM Associate welcome pack. (Recommendations 1 to 6)
* Fundraising tools on which work has already commenced, such as the Bequest Program and Emergency Appeals, be endorsed and implemented. (Recommendations 7, 11 & 12)
* A decision is required as to whether the brand refresh of ABM should be implemented, based on the recommendations and research. (Recommendation 18)
* That the key messages be endorsed and/or workshopped so that consistent communication can be utilised across all marketing and communication tools. (Recommendation 25)

**6 month actions**

* Research into the suitability of investing into philanthropic trusts. (Recommendation 8 & 20)
* Regular Giving development and Lapsed Donor reengagement.(Recommendations 9, 10 & 19)
* ABM’s Appeals are evaluated including the cost ratio, the process of aligning projects to appeals and the consideration of a topical appeal. (Recommendations 14,15 & 16)
* Work commenced on Raiser’s Edge to allow targeted communication to donors based on their giving trends. (Recommendation 17 and general analysis noted in the Fundraising Tactic Review)
* The recommendations relating to program positioning be prioritised by the respective program teams and Communications and timelines be implement for the following period. (Recommendations 21,22 & 24)
* The development of more ministry and mission resources be produced to act as a re-positioning tool as well as enhance ABM’s supporter engagement with new and existing audiences. (Recommendation 23)

**12 months and beyond actions**

* Investment in philanthropic trusts, if deemed strategic. (Recommendation 8 & 20)
* Implementation of fundraising tools and marketing tactics that engage audiences within the broader Anglican Church including clergy, theology students, nominal Anglicans and those outlined in the Evaluation of Growth section. (Recommendation 13)