

Goals and objectives

Develop one or two goals for your outreach and marketing.

Remember that goals are high-level things you hope to achieve. They should be based on research and your project/center’s overall mission, as well as those goals listed in your grant proposal.

Now create some objectives.

Objectives are based on your goals, but they are much more specific. Remember, to make them SMART: specific, measurable, achievable, relevant, and time-bound.

Ladder of engagement

Visualize building relationships with new and existing audience members as a path, using every action that your audiences take as an opportunity to connect and move them up the ladder of engagement—from not knowing you to being your most passionate participant.

UNAWARE

OBSERVERS

SUPPORTERS

ADVOCATES

Who is this?

(List common attributes or connection to your project/center.)

What are they looking for?

(What do they want to understand better about your project/center?)

What do you want them to think?

(Imagine them completing this sentence: I think [project/center name] is...)

UNAWARE

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What do we want them to do?

(Focus on specific actions that might represent where they are on the ladder.)

What tactics can you use to get them there?

(List tools, approaches, or channels you might use.)

How will you measure success?

(Note specific ways you'd know you were successful. You can work with your evaluator to integrate appropriate tactics to help measure success too.)

SWOT analysis

What are some strengths of your current outreach and marketing?

What are a few weaknesses of your current outreach and marketing?

What are your opportunities for 2019? Any interesting trends?

What is threatening your program/center or audience's lives? Any new competition?

Marketing plan worksheet

WHAT	WHAT IS IT?	TIPS FOR WRITING AND RECOGNIZING	INITIAL CONTENT NOTES
Goals	The goal is the big picture statement of what you are striving to achieve.	<ul style="list-style-type: none">• A goal is specific, but it may be abstract—like a state of being or a feeling.• Depending on how you’ve defined your turf, you may have a set of goals rather than a single goal.• If you aren’t sure that your goal is big-picture enough, try asking yourself, “Why is that my goal?” until you find yourself saying, “Yes—that’s why.” Then you know you’re on the right turf.• Should support the overall goals of your ATE proposal.	
Objectives	Objectives are the measurable outcomes that indicate you’ve achieved your goal.	<ul style="list-style-type: none">• Objectives let you know when you have achieved your goal. In this way, goals and objectives are like a package.• Objectives are more tangible and concrete than goals.• Objectives must be SMART: Specific, Measurable, Actionable, Realistic, and Timed. You don’t necessarily have to include each element into an objective statement, but you should be able to identify each attribute in your objectives.	
Audiences	Audiences are the people you are trying to reach and engage.	<ul style="list-style-type: none">• Defining audiences allows you to prioritize how you are spending your time and resources.• Creating audience personas can help you “walk in the shoes” of your potential and existing program participants, donors, funders, partners, alumni, etc.• While you will also be producing materials for large groups of people, try to develop them with specific people in mind so they sound more personal and are more likely to get that person to pay attention and take action.	
Strategy	A strategy is an approach that you think will best guide actions in order to achieve your goal.	<ul style="list-style-type: none">• A strategy is actionable, but it’s not a specific action itself.• A strategy should provoke you to ask, “how would I do that?” which to tactics.• There should be many different ways (i.e., a range of tactics) that you could enact your strategy.• To come up with a strategy, take a look at the whole picture, including your assets, challenges, strengths, and weaknesses. Identify what the best opportunities are, in light of your goal.• If you’re not sure what you’ve written is a strategy, ask yourself: does this strategy prompt me to think and imagine, or does it prompt me to act? If it’s more about action, then you’re probably writing a tactic—not a strategy.	

	WHAT IS IT?	TIPS FOR WRITING AND RECOGNIZING	INITIAL CONTENT NOTES
Tactics	Tactics are action steps you take to carry out your strategy.	<ul style="list-style-type: none"> • Tactics are actions—you need to get your hands dirty to implement them. • You need to know your opportunities, resources, tools, and capacity before picking tactics. 	
Roles and responsibilities	A summary of who will do what.	<ul style="list-style-type: none"> • For both coordination and buy-in, you'll need to be clear what everyone's job is to ensure success. • Some find it helpful to create a RACI (responsible/accountable/consulted/informed) chart. 	
Evaluation	Metrics and other targets to guide your success.	<ul style="list-style-type: none"> • Quantitative and qualitative targets based on past performance and/or industry benchmarks. • Beyond noting what you'll measure, it can also be helpful to document how often you'll analyze the data. 	
Timeline and budget	A calendar can help coordinate and vary efforts and a budget can track costs.	<ul style="list-style-type: none"> • Use a calendar to track all the different ways your program/center is communicating with donors and prospects. • Track various expenses, including soft and hard costs. 	