Personalisation: A New Approach to Marketing

Written by

The Visionary Leadership Corporation

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Chapter 1

Becoming customer-focused and identifying customer needs

Understanding your customers and their specific needs, wants and aspirations is at the heart of a successful marketing strategy. If the service you offer is not as relevant, convenient or high quality as that of another provider, individual customers will not select you to deliver their care. Talking to your customers is the most effective way of understanding what your customer needs and wants are. You need to build up a broad knowledge of your customers by discussing:

- What is important to them?
- What are their key likes and dislikes?
- What is their care background?
- What makes them feel good? What makes them feel bad?
- What would they change about their current care plan?
- What is missing? What would they really like to see?
- How do they perceive your organisation and those similar to yours?
- What are your strengths and weaknesses?
- What is it that makes you different to others in their eyes?

The outcomes of these conversations should be recorded and used as a basis by which to draw up their support plan. Where this is not possible or appropriate, there are various other means by which you can engage with both current, past and potential service users to understand their needs and concerns:

Questionnaires:

These can be used at various stages of the customer care journey and can be targeted at specific groups of individuals. For example:

- Customers who have just completed their care with your organisation
- Customers who showed interest in the care you provided and then did not take it up
- Customers at different stages of care with your organisation

There are some key features of questionnaires:
- Typically short (maximum 5 mins, 10-12 questions)
- Most common type of questions are:
  - rating based questions (e.g. on a scale of 1 to 10, where 1 is very poor/not relevant at all/not important at all etc and 10 is excellent/very relevant indeed/very important etc. please rate the following aspects)
- Yes/No questions
- Behaviour based questions with specific answers
- Closed questions (where all possible answers have already been specified and the respondent picks the most relevant one/s)
  - For example, 'Did you consider any other providers of the service you used apart from organisation A?' Answer: Yes/No
  - If yes, which others did you consider:
    - ☐ B
    - ☐ C
    - ☐ D
    - ☐ E
- Questionnaires of this sort are typically used to gather statistically reliable data and can also be used when talking in detail to your customers is not a viable option.
- Sample size for quantitative questionnaires needs to be relatively large – for statistically robust findings, the rule of thumb is that there should be a sample of at least 50 respondents for each key group interviewed.

Focus Groups:

Focus groups of your target audiences will enable your organisation to really understand how your customers and potential customer behave, what their decision process is, why they make the decisions they make, their perception of your organisation (its brand, what it stands for, how it works, what it

does, what makes it different etc) and will allow you to delve into how the services offered and how the organisation interacts with customers can be improved. You may not need to actively recruit for these focus groups, but could use networks of service users that are already in existence locally e.g. mental health forums, older persons forums etc.

Some key things to consider with focus groups:
- Each group has typically 8-9 respondents in it as well as a facilitator of the group
- It is most sensible to have groups of similar individuals together e.g. not recommended to mix customers / non customers etc as there will be too many varied opinions in the group and it will not flow effectively
- Does not provide statistical evidence (too few respondents) but provides in depth understanding of motivations and decision processes as well as identify need in a way that questionnaires are unable to do
- Focus groups are great for developing and testing brand concepts and service proposition

Chapter 2

Defining a clear marketing proposition

A well thought out marketing strategy and proposition will ensure that your target audiences will have a greater understanding of what your organisation does, stands for, how it differs from others and why they should use your services.

A marketing proposition has a number of key elements to it. Once completed, it will provide you with a framework for any communication, agency usage or promotional material that might be relevant.

1. Market and competitive overview

This is a review of the 'market' that your organisation operates in, including an understanding of who your direct and indirect 'competitors' are and what their offer is. Without a clear understanding of where your organisation sits in your market and who your 'competition' is it will be hard to ensure that you stand out. There are various ways in which this information can be collated:

- Published industry reports
- Review of competitors (what services do they provide, how do they differ from the services your organisation provides, what areas do they cover etc.)
- Talking with opinion leaders e.g. editors of relevant publications, specialist journalists etc.
- Communication with user forums and networks to gain an understanding of what their view of the market is
- Communication with service user's support network e.g. carers, families, friends, GPs who give referrals etc

A key starting point would be to undertake a SWOT analysis of what your organisation offers in comparison to others offering similar services:

- **Strengths:** What are the relative strengths of your offer and organisation compared to the competition? Consider

this from the view of the consumer, not from an internal review

- **Weaknesses:** What are your competitors better at delivering than your organisation?
- **Opportunities:** Think about how you could stand out from the other organisations, playing on your strengths. Also consider whether there are any opportunities in terms of:
- Timing of communication/activity
- Partnerships with other relevant organisations (this will mean you share the cost)

Threats: Be aware of what other similar organisations do in terms of their marketing activity. If possible, don't do marketing activity at the same time or using the same channel as they are doing. This is not always easy to discover; make sure that someone in your organisation has signed up to their mailing list/any other database that they use.

2. Clarification of customer needs

As discussed above, understanding what your customer's needs and priorities are will provide you with all the 'raw data' that you need to determine how to position your organisation and what your key areas of delivery are. Understanding how your customers perceive your organisation and its relative strengths and weaknesses will provide invaluable input into developing your brand and your brand mission.

3. Development of your brand and your specific proposition

Once you are clear about where you sit in your market, who your 'competitors' are, what their service offering and overall proposition is, what your customer's met and unmet needs are and their perception of your organisation, a relevant and representative brand can be developed for your organisation.

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Many third sector organisations already have strong, recognisable brands for their organisations- this is typically regarded as the 'name' of the organisation and a logo. Behind a really effective and cohesive brand is a clear brand proposition, a clear brand image and some clear implementation guidelines on how you and your staff can translate your brand proposition and image into the direct experiences your customers receive by engaging with your organisation. An effective brand is one where at every customer touch point (every time a customer has anything to do with your organisation) the values and essence of the brand are clearly communicated. The customer should have their expectations of your brand met in a consistent manner across all touch points.

Brand proposition:
- Concept - who are we, what do we do?
- Target audience – who are our key customers?
- Market positioning – where do we fit in?

Brand image:
- Threshold values and attributes – the basic requirements to compete in your 'market'
- Functional attributes – the physical features and tangible attributes which differentiate you from others
- Emotional values – Abstract and emotional values that differentiate your organisation

These three sets of values will contribute towards the brand essence of your organisation – the single idea which binds your organisation together and differentiates you clearly from your competition.

Implementation plans:
Effective implementation and communication of your brand

across all aspects of your organisation is key. This will allow you to become differentiated in the eyes of your current and potential customers. Having a strong brand image and an understanding of your proposition is only useful if your customers have this too!

Implementation of your brand happens across all aspects of the organisation, including:

- Services provided
- Flexibility of service
- Staff/volunteer interaction with the customers
- Telephone help line/responding to information requests etc
- Complaints management
- Internal communication and team management
- Organisational culture
- External communications (of all sorts) and marketing activity
- Appearance of your staff /offices/ hostels etc

Key questions to ask yourself when developing your brand marketing proposition:

- Would I, if I were a customer, want to spend money on this? Why? Why not?
- Would I buy the service offered? Why? Why not?
- Could I sell it convincingly to customers? Why? Why not?
- Would I invest in it if I had the opportunity? Why? Why not?

Chapter 3

Presenting your services to meet your customer's needs

Once you have got a real understanding of your customer's needs (what is most important to them, what is essential and what is 'nice to have', what their ideal service would look like, what their background is, how they view your organisation, what they perceive to be your strengths and weaknesses specifically and across the market you operate in), the next step is to re-evaluate your services and processes to ensure they are as customer-centric as possible.

Key questions to ask about your current service provision and how it matches your customer's needs include:

1. Are you offering the services that your customers have told you that are really important tothem?
2. Are they being offered in a way that most meets their needs (e.g. timings, packages, flexibility, location, personal contact etc)
3. How can your services be changed to meet your customer's needs more effectively?
4. Are you customers fully aware of your services?
5. Are your prices competitive?
6. Are your services being communicated in such a way that make them appealing to your potential customers?
7. Are you communicating your key benefits clearly enough?
8. Can you say why a customer should use your services rather than those of another service provider?

External communication to current and potential customers

While, your staff and volunteers are often the main point of contact for your customers and potential customers, written external information is another important method of communication. External written material does not have to be lengthy, complicated or swanky. Some key points of consideration:

- Keep the language simple and easy to read
- Use short sentences, bullet points etc to get the point across at a glance
- Communicate the range of your services, their flexibility etc
- Focus on the true needs that are being addressed by your services
- Focus on what makes you different to others
- Make your strategy clear – what your organisation stands for, how it works with its customers etc
- Provide helpful contact details - email, phone line, address, opening hours etc
- Consider the delivery channel (website, large poster, leaflet through the door) and adapt the style and content to suit how the channel is typically used by the customer

There may be other paper work which will be required to allow you to provide your service to a customer. Review this paperwork – is it customer friendly? Can it be simplified? Does it give the customer enough customisation options?

Overall marketing plan timing/scheduling

The timing of marketing activities can be determined by several factors which need to be considered.

- How frequently do your customers review their service providers?
- Are there any events which are being held which could increase your organisation's visibility?
- What is the normal communication pattern with your customers? Can you add marketing activities to this communication or is that not appropriate?
- Is there any seasonality that is relevant? Does the spring/summer/winter/Christmas/New Year give your organisation an additional opportunity to market to its consumers?

These are just a few example factors to consider when determining the timings of the marketing plan. Each organisation will have to decide when to prioritise marketing depending on the services offered and the targeted audience.

It is also important to monitor the level of communication that your target audience receives. Ensure that any communication is spread throughout the year rather than delivered at the same time. This means that audiences will be reminded throughout the year of your services and the positive difference you can make to their lives – this is more of a drip feed effect.

Define your media

Just as with any business selling products or services, it is vital to ensure that you are utilizing all points of contact with your customers and potential customers as effectively as possible as a selling tool, informing your customers of what you offer, why you are different and ultimately why they should choose to use you as their provider.

Some key considerations:

- Develop a media and communications strategy
  - What information material do you already give to your customers / potential customers? How clear is this on your organisational brand? And what services you offer?
  - What other materials or information do you think would be of benefit to your customers to help them make informed decisions?
  - Do you have a website which clearly states what it is that you do? The internet will be the first place that many people will look when investigating service providers for a specific service.
  - How else would your customers most like to hear about your organisation and the services that it provides?

- Leaflets
- Coming into your home
- Church group/health group
- Think about the key channels of communication that will be most useful and relevant for your customers

When developing your organisation's message, it will be important to consider the language you use. A letter or email will use very different language and level of detail than a flyer or poster that you are passing out to local residents. The language for different target audiences will also need to be adapted accordingly, e.g. if you are communicating with carers, families, public sector professions, you may require your message to be framed differently.

Chapter 4

Managing change

Third sector leaders will have to think about how they are going to manage the layers of ambiguity and uncertainty associated with major transformational projects. Sometime personal responses can get in the way. Do we see change as all bad? Perhaps naively imagine it'll all be ok. Alternatively, we may be able to see that, in reality, some things will remain the same and there will be a mix of good, bad and indifferent outcomes.

As a leader there are 3 important techniques that can be used to manage change:

1. Supporting your staff to manage their own perceptions of change – consistent negativity needs to be firmly redirected with questions like:
   • How can we turn our fear and criticism into solutions?

The occasional authoritative direction, e.g. "Well for now lets go with this until we can get a clearer idea", "Let's close the discussion for now", may also be necessary to ensure fear and anxiety does not become entrenched in the organisation.

2. Introducing big changes to the way your organisation operates will not be a linear or logical process. It will be important to maintain momentum through regular staff and service user engagement and not be disheartened if a coherent vision of the future does not emerge immediately.

3. Try to harness the creativity and clarity that every member of your staff can bring to the change management process. Emotive, critical language and unhelpful behaviour can get in the way of this. This can be refocused and can become helpful if a constructive approach is taken i.e.
   – How could we see this a different way?
   – What would need to happen to move this forward?
   – Is this really the key issue?

As a leader the best starting point for introducing change is a clear SWOT analysis:

Strengths: What are the strengths of your workforce? Where do you see commitment to continuous approval? What does your leadership team do best?

Weaknesses: What does not work as well in your organisation? Where are there gaps in skill or knowledge? Are there parts of your workforce that are too attached to the status quo?

Opportunities: How can this be used as a way of advancing some of your staff's professional development? Is there a place for peer to peer support within your organisation? Could this lead to greater motivational levels and reinvigorate your organisation?

Threats: How will this impact your staff in a negative way? Could this lead to redundancies/ lower pay? How will this affect the way your staff develop relationships with service users?

You may then wish to appoint a clear-thinking project team, which, depending on your organisation could be a mix of staff from frontline to senior management. They will be responsible for putting together a project plan, breaking the tasks into bite size chunks and meeting regularly over a set time-frame, e.g. 9 months, to review progress.

When engaging the whole organisation, try and ensure that material delivered at meetings is visual – people get more anxious when they are confronted by lots of words. As soon as possible, your project team should look to create a set of visuals to portray the 'Customer Journey' service users approaching your organisation will take. This could become be an effective marketing tool later on.

Chapter 5

Training all staff to deliver: Frontline staff, team leaders and volunteers

It will be essential that flexibility and adaptability are embedded in the culture of your organisation. This will ensure that your organisation is extremely person-centric, whilst also being able to function successfully as a commercial entity. Staff and volunteers need to be empowered to be customer – centred. Through training, reviewing, providing the ability to practice (and make mistakes) and working with your staff to give them the confidence to make their own decisions, customers needs will be met far more effectively than if a series of rigid procedures and processes are consistently adhered to.

Training frontline staff

Your frontline staff will be key to the successful marketing of your services. As far as your current and potential customers are concerned they are the 'cold front' of your organisation, and customers will have regular direct interaction with them. Your staff may already be customer focused and delivering services to a high standard, but personalisation may require them to undergo additional training to really ensure they can really engage with and respond to the broader needs and aspirations of your customers. Making sure that any insight from the customer is recorded and used will be essential for building up a genuine understanding of the market your organisation is operating in- what services are popular? What is working in your organisation? Where is improvement needed? Staff will need guidance on identifying what kind of feedback is useful and on the types of questions that they should be asking to elicit this feedback.

Customer service will become increasingly important. As is widely understood in the private sector, people buying products (or services) directly are generally more likely to return to providers who have treated them with courtesy and respect and managed their transaction quickly and efficiently. A good example

of this is Marks and Spencer where staff on the cash tills have undergone customer service training in which they are told to smile, ask the customer how they are, ask if they require any bags etc. Putting a price on a service will generate a sense of entitlement meaning that people will be more active in selecting and returning to the service provider which can offer the services that best meet their personal, individual requirements. Third sector organisations need to learn from the private, retail market and ensure that they encourage a culture where this kind of customer service is delivered across the organisation.

Then

Service and product offered	Drives ▶	Customer acceptance/tolerance

Now

Customer needs	Drives ▶	Service and product offered

New skills for team leaders

Team leaders and managers will be the key individuals within your organisation who can ensure that their teams are focusing on changing their behaviour to become more customer-centric and aligned to your organisation's values and principles, across all activities. Senior figures within your organisation will want to ensure that their teams understand the change required to respond to the personalisation agenda, have a clear understanding of what it means to them and are clear about the path they need to take to feel confident in their approach to engaging and working with customers. There are several ways in which this can be encouraged.

Motivating a team using facilitative questions

Provide your team with the opportunity to talk and think through the possible consequences of implementing personalisation. Use facilitative questions to challenge your team to think further and deeper about how this change might impact them and how they can adapt and develop their behaviours, processes and ways of working to become more customer-centric. Involving each team member will make them motivated and give them the opportunity to engage in shaping the way changes are introduced.

Goal and action plan setting

The changes that are identified by your team may be large, overwhelming and quite scary. By breaking these changes down into smaller, achievable goals, your team will feel that they are continually making progress towards becoming fully customer-centric and truly aligned to the organisation's values and principles at all times. Help each individual identify what their individual goals are, and how they can be broken down into smaller, more
actionable journey goals. For each journey goal, identify the action plan that is needed to achieve this goal, what any possible barriers are and how they are going to be overcome, whether any extra resources are required (from the team leader, someone else in the organisation or externally) and what the time line for each action point is.

Follow up time and dates

During times of change and uncertainty, it is essential that your team feel that they have the support they need, as well as ensuring that they feel able to contribute to the change. Agreeing follow up sessions (dates and times) with your team to review their progress towards their personal goals as well as the team goals will support them on their journey, provide them

with the opportunity to discuss any challenges they are facing and ask for support, celebrate goals reached and determine next steps if appropriate. Attending these follow up sessions is a clear indicator that individuals are committed; these sessions should be compulsory and any non-attendance taken seriously.

Difficult questions role play exercise

Each person who interacts with and could potentially face challenging communication situations with the customer has to have the ability and confidence to answer questions effectively. There are a number of possible exercises which can be used to help your team feel comfortable with using their initiative in providing answers that are theirs and are still true to the values and principles of the organisation. Providing role play opportunities is one of the best ways of developing a set of possible answers for difficult scenarios.

Feedback

Feedback from your team is essential in understanding how effectively the changes are being embraced, in terms of behaviour and attitude, and will give you valuable insight into where the most significant challenges lie. Ask focused questions to ensure that all the relevant information is shared. Feedback is only really effective when the contributors feel that they are not being judged, ostracised or seen in a different light as a result of their feedback, so it will be important to encourage a relaxed environment in which no individual will be penalised, regardless of the feedback they offer.

Progress monitoring

The process of integrating change to any organisation takes time. Taking your time and being thorough, ensuring that all individuals are comfortable and clear about what it means in terms of their behaviour, job and attitude towards the organisation will result in

a final team of staff and volunteers who are living and breathing the organisation's brand, its values and its principles. This will be clearly observed by all current customers, potential customers, partners etc. There are a number of elements that it would be sensible to monitor in the early stages of implementing big changes:

- Customer's attitudes and perception of change: through focus groups, questionnaires, talking to ancillary carers etc
- Change in staff behaviour
- Review of your revised services in comparison to that of other 'competitors'
- Service evaluation; questionnaires from customers to rate service etc. These can then be compared with prior to any change in service

New skills for volunteers

With the shift to making your organisation as customer –centric as possible, your volunteers are just as important as your permanent staff in delivering and communicating the brand; through their behaviour, through their language with their customers and how they talk about the organisation and the services that are offered. New skills will be required to ensure volunteers behave in a customer-centric manner. This, however, does not mean long and expensive training days. Instead, with some considered preparation, the majority of these skills can be learnt, developed and practised on the job with some element of observation, opportunities to make mistakes and provision of regular feedback. A number of key tools will make the process of transferring knowledge to your volunteers smooth and efficient.

1. Develop scripts

Consider the main points of interaction between volunteers and the customers. Review what is being said at the moment and develop key points for these discussions that provide

guidance for volunteers. Each volunteer should be empowered to lead any conversation in the way that they feel is most suitable, and scripts should only be seen as a framework around which to work.

2. Rehearsals

Depending on how your organisation currently operates, your volunteers may feel more comfortable if they are given the opportunity to rehearse some scenarios using customer centric scripts. This will provide them with the opportunity to ask any questions they may have, experiment and make mistakes in a safe environment, gain exposure to and new language/communication modes that are relevant and to highlight any possible challenges and their solutions.

Induction and recruitment

Recruitment of the right staff and volunteers is very important. Customer-centric performance indicators can be added to the recruitment process, e.g. when developing job specifications and evaluation processes, a key element of each job must be focused around putting the customer and their needs first. For new staff and volunteers, the induction process must include a strong focus on how the organisation and everyone and every process within it is customer-centric. This will install this philosophy as a key tenet of the organisation's working practices. During the induction process, ideally before having any direct customer contact, the new volunteers will have the opportunity to practise some customer-centric conversations, highlight any concerns and ask any questions.

New systems and processes

To ensure an effective shift towards a more customer-centric focus of your organisation, a review of your current systems and processes is highly recommended. This does not have to take

long and does not need to be complicated! Systems and
processes may include:

- Appointment booking
- Reception handling
- Phone procedures
- Emergencies
- Staff allocation
- Resourcing
- Cancellations
- After care

Some key things to consider

- What are the customer facing processes that exist? Are they
  targeted to the customer? Are the needs of the customer
  being met in these processes? Are they flexible enough to
  meet the needs of every customer?
- How are customer needs and requirements recorded?
- How flexible are your processes?
- How flexible are your staff contracts? Can support be
  offered outside regular office hours?
- How can customers select the service they want?
- Can customers select the support providers they want?

Get regular feedback

The most effective way of getting an understanding of how well
you are meeting your customer's needs is to get regular
feedback, directly from your customers and their family or
support network, their carers (if appropriate) and your frontline
staff, as well as from those service users who have chosen to
receive care from an alternative service provider. Provide easy to
complete feedback forms and ensure that these forms are
passed on to the end user at an appropriate stage in their care
and take up of your service. Making sure that these forms are as
accessible as possible will help the rate of return. Take the time,

when possible, to contact your customers directly to ask them for feedback or organise regular forums where they can provide their feedback, honestly and openly. Staff are an invaluable source of feedback - if they feel they can give it without being judged. Some suggestions for eliciting this include workshops sessions or a customer champion amongst the team who focuses on understanding customers and collates feedback on a regular basis (ensuring that it is anonymised).

Establishing a pilot scheme

A staggered change towards introducing greater customer-centric behaviour and processes may be more appropriate for your organisation, as perhaps this change will have too much of an impact on the operations of the business day to day. A pilot scheme is highly recommended; it will allow you to test some ideas, see what works and consider options for those areas which were less successful and it will provide an example for the further roll out of the new processes and behaviour.

When selecting where to conduct the pilot scheme, there are a number of things to consider:

- Select a discreet area of the organisation
- Make sure that everyone in the organisation is aware of the pilot scheme, where it is happening, why that section /area was selected for the pilot, how long the pilot period will be and what the subsequent actions / roll out plans are. Even though not all of the organisation will be involved in the pilot, it is important that the whole organisation understands the organisation's focus on customer-centric behaviour.
- Be specific about what is being piloted, how it is going to be measured (i.e. was a specific initiative successful) and over what time frame
- Be clear about people's responsibilities – even though it is only a pilot, the staff involved will need to have any necessary

training and support to ensure that they can deliver as
required.

Reflections and feedback

Reflections and feedback from any pilot scheme will be key to
shaping customer centric behaviours, systems and processes for
your organisation. Try and gain feedback from as many people as
possible: current customers, potential customers who interacted
with the organisation but didn't take up your services, ancillary
individuals e.g. carers or nurses as well as internal staff. A
workshop for all those involved in the pilot to highlight the wins
and the challenges would help everyone feel that they are
influencing the future of the organisation.

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Chapter 6

Key marketing techniques

Below is a summary of the most common marketing techniques and methodologies. Not all will be suitable for your organisation – they may not be specific enough for your target audiences, they may be too expensive or the channel through which they are delivered may not be appropriate. However, hopefully they will give you a broad understanding of what your options are. If you are interested in doing any of these for your organisation, it may be sensible for you to develop a relationship with an appropriate agency to help you manage the marketing.

Direct marketing techniques

These methodologies provide you with direct access to your customers.

1. **Leaflet drop** – your organisation will be able to select the area that you would like to have leaflets dropped into people's letter boxes. This could be appropriate when you are promoting a fund raising event for people in the local area, when you are looking for local volunteers etc. You can also drop leaflets off at relevant organisations e.g. care homes, doctors practices, leisure centres etc.

2. **Direct mail** – you are looking at sending out a larger number of leaflets by post. You can again select the area, the addresses etc and you can be targeted with this. This can be used for the same reasons as leaflet drops (typically, direct mail used when larger number of leaflets are being distributed), also used for gathering sponsorships/ contributions. A lot of charities use this method. It is also often used to keep interested parties/ individuals informed of progress within the charity/ organisation e.g. Macmillan trust, Action Aid etc.

3. **Direct email campaigns** – these will be typically targeted at people who have already had some interaction with your

organisation and you have collected their email address from them. Email communication can be used to bring people up to speed of any exciting events / progress that has happened, to inform them of some event that is happening, to ask them for sponsorship / volunteer time etc. It is possible to be much more personal and individual with these emails. It is also possible to target different people within your customer database with emails that are most relevant to them, assuming that you can segment your database before you send your mails. This is the cheapest way of direct mailing – it is a cost of the email.

4. **Phone campaigns** – using either a contact list that your organisation has put together or a cold calling list (it is possible to buy lists of relevant contact numbers), a telephone team can contact individuals about your organisation. This methodology can be used for all sorts of purposes, and is typically used when an immediate response is required e.g. attending an event, having a volunteer pack sent to them etc.

Above the line marketing techniques

These are marketing techniques which are less targeted in terms of whom they are directed at. These techniques may also reach people who you are not directly targeting. Above the line marketing techniques are typically far more expensive that direct marketing techniques.

1. **Newspaper/magazine advertisement** – if you are looking to promote a special event in a local or national newspaper this will raise awareness.
2. **TV/radio advertisements** – these are typically very expensive and unlikely to be value for money for your organisation. However, local radio advertising may be effective.

3. **Bill boards** – again, typically unlikely to be value for money for your organisation, unless their location is specifically selected to link in with a suitable events etc

4. **Sponsorship** – This is when a person or an event is sponsored by your organisation. This is a way in which to get great exposure of your organisation. When considering sponsorship, think about what person or event will be most suitable and aligned with our organisation's values. As you are a voluntary organisation, individuals may be happy to be show their support for free. Of course the more well known the individual is, the better the response might be. Your organisation will typically have to contact the celebrity through their agents. It looks good if famous people help charities so do your homework. Which well known faces have some association with the area that your organisation works in? The more they can relate to it, the better it will be. The person could wear clothing with your organisation's logo on it, be part of an ad campaign or become a spokesperson for your org. In the case of an event, be ruthless about using your logo, getting speaking slots etc.

PR – Public relations

PR is another way in which you can communicate to your target audience. PR focuses on managing the communication between your organisation and the public. It manages the communication of what your organisation does to the general press, to specialist press, to new programmes, to conferences etc. PR is about making sure that the best image of the organisation is communicated to the public. It is different to marketing in that you are not focusing on a specific campaign – it is around raising awareness and making sure that the organisation comes across as positively as possible. PR activities could include:

- Interview with a journalist
- Being asked to be part of a panel at a relevant debate
- Being invited to a relevant dinner / event
- Making sure that any positive activities / results that your organisation has done is communicated to the right people
- Promoting any sponsorship deals that your organisation has to the public

PR does cost money to arrange (typically a specialist PR agency is used). However, the public and your target audiences will respond to it differently than marketing activity – it is about your organisation being regarded in a positive manner and increasing awareness rather than looking for a specific call to action, as many marketing campaigns will be.

Cost effective marketing

Many third sector organisations do not have a huge amount of budget available for marketing services and communicating with your target audiences.

Simple, innovative marketing must be the focus here. New media marketing is much more cost effective than traditional marketing as it provides a much more targeted audience base and people can be reached directly, through email or other direct contact methods. New media communication also allows you to be more specific with the message you disseminate, ensuring that you reach your target audiences. Specific messages highlighting the various benefits can be developed for different audiences at no extra cost apart from changing the text of the message. Consider how the message of your organisation can be communicated to as many relevant individuals as effectively as possible.

Consider some of the following:
- Delivering a speech at a relevant conference or seminar
- Holding a fund raising day in the community to raise awareness amongst potential customers and donators
- Develop a 'personal marketing'' plan – face to face marketing with relevant gate keepers, customers and ancillary service providers
- Consider creating marketing partnerships with complementary services to support each other

Your organisation will already have a database of individuals who have been involved with it in some way in the past. Use this database of current and potential customers to communicate with directly. Ensure that contact details (email ideally but this is not always appropriate or available) are asked for from any individual who has relevant contact with the organisation.

If the marketing is local, flyers and posters are a good, cost-effective method. These can be designed in house and then taken to a local printer to have them printed off. Posters and leaflets could then be delivered either door to door or put up in local community centres, libraries, leisure centres, Job Centres etc. Local shops and post offices may be happy to display a poster for free.

Chapter 7

Measuring the success of marketing activity

Being able to assess whether your activity has been successful and how successful it has been is just as important as developing the campaign effectively for your target audience. There are several ways in which campaigns / communications can be assessed.

One simple way is to ask every individual who calls / gets in contact with the organisation where they heard about you / why they are contacting now. One of the key positives of this method is that it is free. However, it is not always accurate as it is very hard to enforce everyone who talks to someone (over the phone or email etc) to ask the correct question.

Another way in which one can record the success of a campaign or communication is to have a drive to action following the campaign. For example, if you have launched a campaign which included the phrase 'phone this number...', 'email this address...etc.' the number of people contacting the organisation through these specific channels should be recorded. If it is not possible to have a separate email/ phone number before the communication is launched , the level of activity on current communication systems (e.g. how many phone calls/ emails a day) can be recorded and then compared to activity levels post communication. A time frame will need to be agreed over which the activity level will be recorded.

If the drive to action is increase in donations this can easily be measured. Again, a specific time frame needs to be determined. This will allow the correct allocation of activity to the campaign.

Example of implementing a marketing activity

Case study: a small independent furniture retailer

This business had never done any marketing before. Step 1 was to understand its own business and identify its strengths and weaknesses. When looking at its competitors, it identified that its key strength or point of difference was that all the wood furniture was made from organic / sustainable sources and the products were made in England. This was something that they had always been proud of, and it did mean that their product is more expensive.

They then reviewed what their competitors were saying (i.e. what was their strength) and what they were doing in terms of marketing activity (collected leaflets, adverts (through all channels) and press to identify where the opportunities for their brand sat, to ensure that any communication had the biggest impact.

Initial thoughts were that potential customers would only be interested in sales-led communication, where a promotional offer would be present. However, when evaluating what other competitors were doing, they realised that what would make them stand out would be focussing on the origin of their material.

They also reviewed their customer base to understand who was buying from them, using this information to identify where potential customers could be found. This showed that the vast majority of their customers live within a 3 mile radius from the store. This meant that true local marketing was what was needed.

Flyers were the most sensible channel as they could be hand delivered (keeping costs down). It also allowed them to make their flyers a little different – they attached a very small sample of wood to each flyer which made the audience notice the flyer rather than put it straight into the bin.

Flyers were distributed over a 3 day period (Wed – Fri) and they saw a real increase in customers coming into their store that weekend and the following weekends. They asked everyone that came into the shop where they had heard of the shop and recorded the results.

How to harness other resources

Keeping on top of new resources/new initiatives

With the implementation of this change towards personalisation and the implications that this will have on your organisation, there will inevitably be areas where clarity is lacking and where issues may arise. Using experts with specific skills and knowledge in areas of weakness is a great way of minimising these concerns at relatively low cost.

Consider putting together an external advisory board if your organisation does not already have one. Think about the additional skills and knowledge that might be beneficial as a result of this change e.g. on how your organisation will be funded; are you lacking the right marketing skills? Do you need to train some of your staff in how to become customer-centric? Members of your advisory board may be very happy to contribute specifically to your organisation free of charge or for minimal fees – they believe in what you do and want to help.

We asked a range of third sector chief executives, "If could have the perfect advisory board tomorrow who would be on it?" Answers included:

- Local MP
- A good networker
- A fundraiser
- A retailer
- A marketing expert
- Director of social services
- Business link
- Someone who has implemented personalisation
- IT/systems person
- A dreamer, a realist and a critic
- A service user

Case study

In 2007 United Response decided to introduce personal budgets more widely among their service users. They put a small project team together made up of frontline staff, team leaders and senior management to think about why this was a good step to take – for the organisation, for the service users, for the staff, what they wanted to achieve in the long-run and how they were going to do it. They approached their trustees and were gained their support for the proposal, using their feedback to refine the scope of the project. Their project team began by asking "what is it that we want to offer those who access our services?"

Based around the answer to this question they began defining the products they would market to those holding personal budgets. They found that the most effective way to demonstrate how much value their services delivered was to build up a library of clear case studies making sure to emphasise that all care programmes would be co-produced

with and tailored around each individual. Within this model, they enabled two severely disabled 19 year olds to recruit a support worker with an interest in gardening to support them in running a small gardening business. They put their 'menu of products' on the Shop4Support website (https://www.shop4support.com), began using their database of contacts to put together mailing lists for any leaflets or information packs they produced and embarked on a short advertising campaign in local newspapers, sector-specific magazines etc. One of the most successful initiatives they tried was establishing s series of family focus groups which gave honest feedback on the experience of receiving care from United Response. This led to the development of a Family Charter and a 6 monthly magazine, In Touch, designed for friends and families of the charity.

Throughout the project they regularly reviewed the organisation's capacity and eventually decided they required additional training and some additional staff:

- An account manager to engage directly with families (with extra communication skills training)
- In house marketing training
- More regular training for reception staff

Over the last 6 months, 10% of service users have been moved onto personal budgets.

A striking commonality between all organisations that have marketed their services to individuals has been the use of case studies to really bring the merits of what they offer to life. Dimensions, a large provider supporting those with learning disabilities and autism, describe this as a marketing strategy with "an anchor in reality".[1]

[1] *Dimensions: A Provider's Journey from Tradition to Transformation,* Steve Scown with Helen Sanderson, 2010

Marketing tips and techniques

Demonstrating outcomes

Demonstrating the positive outcomes your organisation delivers (as opposed to its inputs and outputs) will be one of the key challenges for third sector leaders and will be an essential part of marketing your services to prospective customers. While there are many well-established models for measuring quality, e.g. PQASSO, all of which have their advantages, few truly map the journey made by service users over a longer period of time.

One model which does do this is the Outcome Star. This is described by its creators, Triangle Consulting, as an "outcomes tool not a quality assurance tool. It has been designed to be used by service providers to support client change and measure service outcomes."

It was originally conceived in 2003 for use by St Mungo's, but has since been adapted for use in mental health, worklessness, alcohol abuse, older people, long-term health conditions and sexual health. It can be downloaded free at: www.outcomesstar.org.uk

The tool comprises a number of scales arranged in a Star shape. Each point on the Star represents an outcome area – an area of the person's life in which the service is seeking to create change (though not all service users will have issues in all areas). Different Stars have different points – the one below is Alcohol Star

Alcohol Star
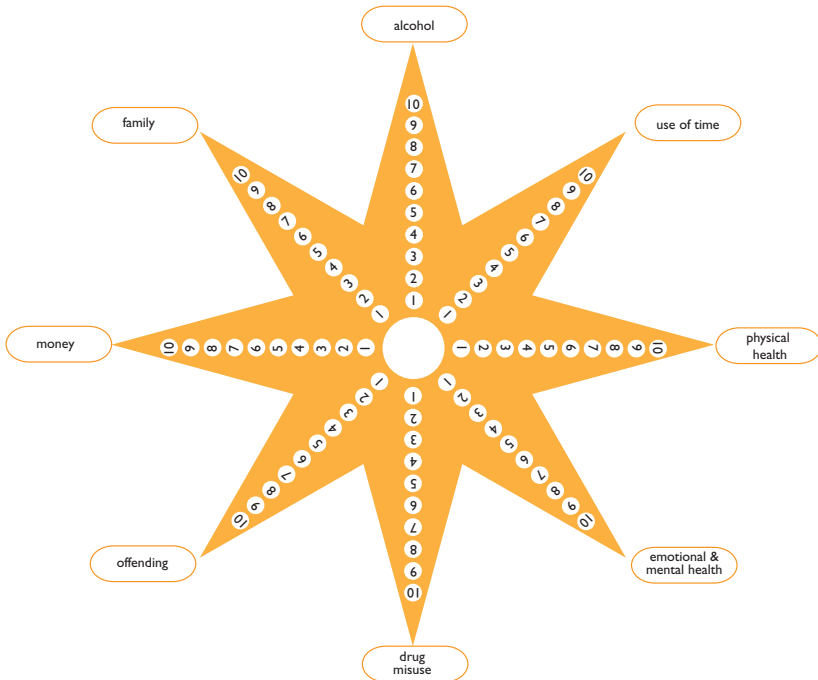
For different Stars the end goal is different. For the homelessness and recovery star the end point is self-reliance (not needing a specialist service any longer). For the Older Person's Star (currently in draft) the end point is that independence and well-being has been maximised.

All Stars are underpinned by a journey of change – and understanding of the steps a person goes through to reach the end goal for that area of their life. Each number represents a progression on the journey e.g.

Alcohol

This scale is about your drinking and any changes you are making inrelation to alcohol. There are different ways of achieving a score of 10. For you, this might be abstinence or controlling your drinking so it doesn't harm others.

Where are you on your journey?

Self-reliance

10 — I don't have a problem with alcohol or can manage issues without support from the service

I am misusing alcohol with occassional support.

3

Learning

8 — Getting control. I have choices about what I do and mostly I choose well.

I understand why I had/have a problem and what I need to do

7

Believing

5 — I see that I need to make changes myself to tackle my drinking

I am doing some thingsmyself to address my drinking

6

Accepting help

4 — I am willing to try things my worker or doctor say will help

Maybe I need some help around my drinking

3

Stuck

1 — I don't have a problem with alcohol though others think I do

Maybe drinking does cause problems but that's just the way it is

2

Plotting scores on the Star gives a visual summary of where the person its at this moment in time on each outcome area. When the measurement is repeated at a later point in time the second score can be plotted. The difference between the two, and hence the change, can easily be seen and understood.

One comment from an organisation which has used the star: "The services are more client-focussed because the Star makes us think about the client and what is changing for each individual... It has helped staff to start thinking creatively about how to get greater improvements as well.
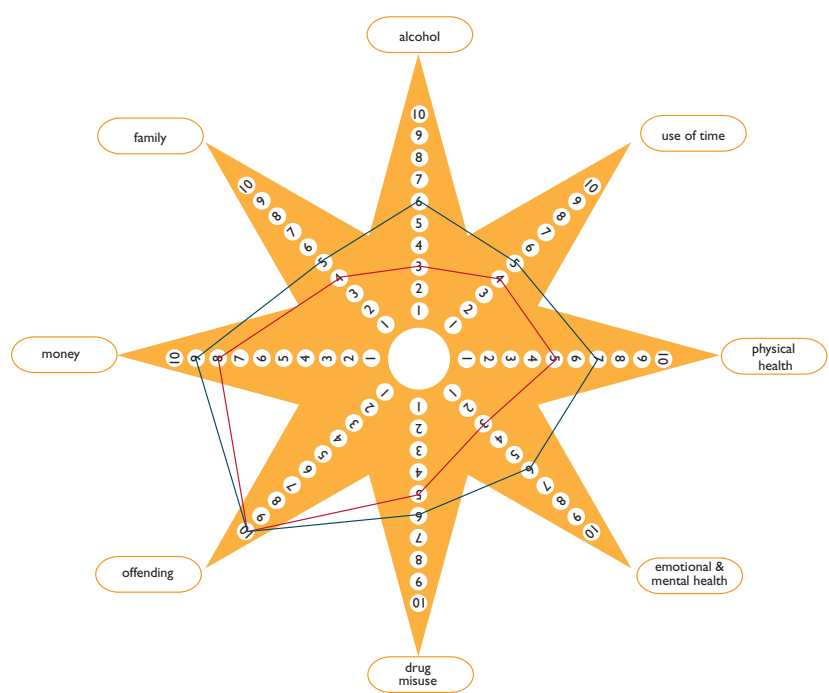
This section will hopefully provide you with an overview of some of the key learning that can be drawn from this report. Of course every organisation is unique in what it offers, its size, structure and circumstance so not all these tips will apply to your organisations. However, hopefully some of them will be useful!

Tip 1: Think about who your target audience is
- What would be the most effective channel to communicate with them?
  - Email
  - Posters
  - Leaflets
  - Meetings
  - Online
  - Over the phone
  - Through publications
  - Through their carers etc
  - Through working sessions
  - Community events
  - Through volunteers / events
- When would be the most effective time to communicate with them?
  - At weekends
  - In the evenings
  - During the day
- What style of message would be most relevant and therefore be received most positively by your target audiences?

Marketing costs vary depending on what time of day and what day you want to advertise.

Tip 2: Be really clear about the different target audiences that you have and that marketing to them all will require different methods
- Direct customers
- Gate keepers to customers
- Volunteers

Tip 3: Be clear about what the message is that you want to communicate to your target audiences – and remember, it may well be a different message for different audiences

Tip 4: Be consistent with your messages. This will mean that your audiences will remember the message more quickly and it will take less time (and money) to raise awareness. Inconsistency of communication message will just lead to confusion amongst your target audiences.

Tip 5: Make sure that all your communication material to your customers and other target audiences is consistent in terms of design, tone of voice, colours and logos used etc

Tip 6: Your staff and volunteers are a key marketing tool – make sure that they are all consistently communicating with your customers and target audiences; do they look the same, communicate the same messages about the organisation, behave in a way which is consistent with the values of the organisation etc. There may some additional training which is required here to ensure that a consistent approach is delivered.

ACEVO is the professional body for third sector chief executives. We connect, develop, support and represent our members, to increase the sector's impact and efficiency.

We promote a modern, enterprising third sector, and call upon organisations to be:

- **Professional and passionate** in achieving change and delivering results
- **Well-led**, with a commitment to professional development, training and diversity
- **Well-governed and accountable**, with robust and fit-for purpose systems to protect independence and enable effective decision-making
- **Enterprising and innovative**, taking a businesslike approach to funding issues and striving for continuous improvement and sustainable development.

For more information, visit www.acevo.org.uk