Marketing in the NDIS – webinar 2

# How to develop a marketing strategy

This webinar was recorded in February 2018.

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# Slide 1:

## Housekeeping

Good afternoon, everybody. I am, as advertised, Stefan Delatovic from Think HQ, and we’re here to talk about how to develop a marketing strategy. Thank you everybody for coming. I know it’s a time commitment, and I appreciate you giving us an hour to talk through this, but hopefully you will find it useful and we can all learn things and generate high fives.

I’m Stefan. I’m an account director with Think HQ. We’re a communications agency that does a lot of work with yourselves and organisations of your stripe. My background’s in journalism: newspaper journalism, editing, and then also working in state government and emergency services in communications, media relations, advertising and marketing, so I’ve played in this space for quite some time.

You’ll be on mute for the webinar, but there’s a question box where you can lodge any questions that you have. I’ll just be working through the presentation for the next hour or so, but I do really encourage you to, if you have a question, just chuck it in as you have it and they’ll come to me. So if it’s a question - they’re effectively anonymous, so feel free to just ask anything you would like at any time and I can pause and address those questions as we go.

# Slide 2:

## Developing a marketing strategy

So let’s go for it.

So yes: Developing a marketing strategy. For those of you who – this is our second webinar in this series. Our first one was about how to get marketing on the agenda of your organisation. If you were in that one, welcome back. It’s good to sort of see you kind of as a name again. If not, don’t stress. This is quite a self-contained piece of work.

# Slide 3:

## This webinar will cover…

So today we’re going to be talking about putting together a marketing strategy, and we want to talk at that from end to end. So we’ll be going from the purpose – you know, why would you want to do a marketing strategy, and also what’s the point of marketing, and what does it look like, and understanding the vision and mission of your organisation, and then really digging into what makes a good marketing strategy.

This presentation will present as effectively a big list of prompts and questions that are really designed to get you thinking about your organisation’s vision, mission, and just understanding the terrain of who you are, what you’re doing, who you’re talking to and why, because that really is the purpose of your marketing strategy. A good marketing strategy is highly tailored to who you are and what you’re looking to achieve. And then at the end we want to talk in quite practical terms about what the structures are for that marketing strategy.

So we’ll go through why, what it is, and then at the end just some really practical tips for effectively what are the subheadings you can put in there to really get cracking and get it done.

# Slide 4:

## Where does marketing “fit” in within your organisation?

So first we want to talk about where marketing fits within your organisation.

# Slide 5:

## The benefits of marketing

The big question is: What is the point? What’s the benefit of marketing?

Marketing, in my experience, and communications can be derided as a bit of a fluffy addendum to peoples’ core business. People – you know, an organisation, and an organisation such as the one you’re all working with, doing sort of hard, complicated work, vital stuff that is community-building really, and it’s easy to look at marketing as a nice-to-have, something that there’s never quite enough time to do, never enough resources. And also, you know, "do we really need to do it? We’re not doing this for the accolades. We’re not doing it for attention, so why do we need to market? Why do we need to advertise? Surely that’s just some hippy-dippy thing that inner-city hipsters do” – and I say that because I’m an inner-city hipster, so it makes sense.

But the point of marketing is not to get attention, and it’s not to make a big shiny ad. It’s because marketing is a process of understanding who you are and what you’re doing and communicating that to your audience. Your audience are your potential customers. So you’re doing it to generate business, and when done well marketing is a value-adding process that can be applied to every aspect of your business.

So if we look at the benefits of marketing in that context, it’s these.

### It’s retention and recruitment of clients.

Put super simply, there’s someone out there who’s a potential client. If they’ve never heard of you it’s much harder to become a client. So marketing is a way of waving your brand in front of them and letting them know who you are, and then at the time when they’re thinking about engaging you they know who you are. And equally, the energy it takes to recruit new clients is a lot more than the energy it takes to retain existing clients. When we talk about the bottom line, a lot of effort can be well spent in working to retain your existing clients, because it’s a lot easier to keep who you’ve got than find new people. And so marketing is about teaching those existing clients who you are and why they should maintain that relationship with you and why they should be connected to you intellectually and emotionally.

### Positioning

Marketing is a great way of teaching those clients who you are and what you stand for.

And it’s also a really big part of your reputation. So your reputation is how people perceive you and how you can reflect that, as it says there, that “experience and professionalism”. You, internally within your organisation, will have a really clear understanding of who you are and what your point of difference is: What is it about your organisation that makes you unique and interesting and worth engaging with. It’s very easy within an organisation to under-appreciate how hard it is to translate that to an external audience. You’re living and breathing your organisation every day, and so you understand it at a more granular level than the person on the street. So marketing’s a way of translating that and projecting an excellent reputation. You want to project that out into the marketplace so that people can find you and understand why they should follow you back to the office.

Reputation is also a good lens to look at this through in terms of risk mitigation. Having an excellent reputation depends on putting your best foot forward, but also making sure that any risks to your reputation are looked after and that you’re maintaining the trust of your audience. So reputation is a good way of mitigating those risks, which is really important.

### And staff retention is a big one

Which is often under looked, as marketing is often perceived as a purely external discipline: you know, “we are marketing our organisation. It is the way that we interface with the public.” That’s true, but a really valuable by-product of that is the retention of staff, because staff are another key audience. Staff stay with a place that they respect and that they understand, and staff want to feel like they’re part of the team, so a good marketing practice – an organisation with a good marketing practice is an organisation that has a clear understanding of where they’re going and who they are and where they want to go, and how everybody needs to pull together to achieve that. And so an organisation that has that is naturally transmitting that to their staff in real time, and that benefits greatly in terms of internal cohesion, retention, which obviously has bottom line implications because you’re spending less time and money on turnover and training because people feel like they’re part of the team. They know where they’re going to be in five years, and they want to see it happen.

# Slide 6:

## Good marketing depends on...

Good marketing, you know, on a super-high level, depends on what’s involved and who’s involved. So marketing requires resources, it requires time, and it requires people who know what they’re doing. The idea of producing a marketing strategy is it front-loads a lot of that effort. By having a clear marketing strategy you’ve had the think about who you are and what you’re doing and what you’re trying to achieve, and then as you go out in the world to undertake your tactics, you’re most of the way there because you can just be deploying this rather than having to start from the start every time. [Inaudible] sort of rules of thumb that do this.

# Slide 7:

## The 4 Ps of Marketing

So this is a good - in terms of things to print out and stick on the wall as you’re pondering the nature of the universe and how much marketing could help you – this is a good place to start: Product, promotion, price and place. And it works because it is super-broad and simple. When you’re thinking about marketing, you’re just looking at, you know, what are we trying to sell? How [inaudible] find out those two things, and when are they going to find out?

So if you think about that, you know, if you’re on the tram or the train to work and you see a billboard that tells you that you could buy a coffee at the place you’re about to go to for $3, that’s something that is so common that we effectively screen it out of our conscious waking lives, but you can see that those four elements have all been baked into that. Someone has thought about what is this product? How much are we going to charge for this product? When are we going to tell people about it, and where are we going to tell them? So the billboard on the tram that tells you the coffee’s $3 is a good example of that.

Your product is very different to a coffee that people might want when they get off the tram, but that foundation [inaudible]. So a key point of the business and marketing strategy is linking it to [inaudible] is truly reflective of what you’re doing.

Sorry, we’re just getting a report that the [inaudible] if you want to just yes or no in the questions there just so we can see [inaudible].

Hello everybody, is that sound better?

# Slide 8:

## Linking business and marketing strategy

We’re just trying a different method of getting the sound going. Just let me know – it looks from our end that it’s working, but just let us know if you can hear me.

# Slide 9:

## The 4 Ps of Marketing

So it looks like we’re good. I’ll just go back to the 4 Ps, just because that was probably where I sounded like a weird robot whose voicebox kept exploding.

So 4 Ps: product, price, promotion and place is a really good rule of thumb in terms of just starting the back of the envelope thinking about how marketing could work for you is a good one to do. Print this out. Have a think about it. It’s your north star, right? Because effectively you are looking to market a product - and a product may be a bauble you are selling or your organisation or a service, whatever it is - you are looking to market that product and you need to think about, obviously, the things that are influencing people is the price of that product: Can they afford it? Is it worth the money? Promotion, which is about how do they learn about that product, which is about what is the method that we are using to communicate with them, and also, what are we choosing to tell them about it that entices them to purchase it? And also place is really important: When are we telling them?

So the example I gave before was a billboard on the train which is advertising a cup of coffee, which is a very simple sort of marketing tactic, so simple that you probably would ignore it most of the time, but these four concepts are baked into that tactical deployment of marketing. It’s a product – a cup of coffee – that’s being sold for a price - $3, which we would obviously put there. We’re promoting it via a billboard where we’re capturing people on the train, because there’s a lot of people there thinking about that first coffee and how good it’s going to be. And place: the train. It’s just an easy way of surmising that you just need to – there is value in sitting down strategically and thinking through these four things whenever you are about to undertake marketing, and it really does help.

For example, a lot of marketing can be done via social media, because that is a very valuable place because there is an enormous audience there. And through the sort of targetted advertising that can be done via, say, Facebook, it allows you to – you know, the price of that advertising is very inexpensive. It’s a place where many people are, and you can segment it to get exactly the right people in that place, and it’s a promotion that they understand.

# Slide 10:

## Linking business and marketing strategy

Another key starting concept for the marketing strategy is making sure that you’re linking it to the business. This is particularly valuable, and we talked about it a lot in the last webinar, but in terms of managing up. If you have stewardship of the marketing function – you may be the – anyone from the person who’s doing the work, who’s updating the tactical Facebook page, for example. You may be the manager who looks after the marketing function in your organisation, or you may be a CEO who’s answering to a Board. Ensuring that your marketing strategy is clearly linked to your business, and particularly your business’s overall strategic plan, is really important because not only does it mean that it will work, because you will end up with tactics and objectives which are driving your broader objectives, but by really spelling that out quite clearly it gives that assurance to Boards and Executives and leadership, and also stakeholders and the public, that you are working with intent.

If you end up with a marketing strategy that can draw a very bright line between an overall strategic objective for the organisation down to every nitty-gritty tactic you do, you are in a very powerful position because you have given comfort and assurance to everybody that you are working with purpose, and that drives everything from ROI to effectiveness and that sort of thing. So it’s really worth doing.

The next few slides we’re going to be going through are some of the – doing a marketing strategy, a lot of it is just really understanding your terrain, and that’s internally for your organisation and also the culture and context that you sit in. So we’ll be talking about that for the next few slides.

So we start by understanding your own position: so what’s your costing and pricing, and what are your projections. Obviously you’re looking to market a product, a service, to a particular client base, customer base. And it almost goes without saying but you’d be surprised how often people overlook it, but just understanding what is the cost, what is the price, and what is it projected to be. Are you in – you know, your marketing will be influenced by are you providing a service which is – is it cheap? Is it expensive? So is it a bargain or is it premium? And are you in a comfortable place financially? Can you afford to market to a specific segment to grow that, or are you needing to hustle to get more business to keep the lights on, so you’re looking to go wide, for example. All of these potentially seemingly unrelated pieces of information are going to add up in the end to a clear understanding of who you are and where you’re headed, and so what’s the message you’re looking to tell to the public.

What marketing resources do you have available is a big one. Very different marketing strategy depending if you’ve got $200,000 a quarter for television advertising to put a big shiny ad on in the middle of *Home and Away*, or if you’ve got $15 and a can of Coke for the year. Obviously there’s no point doing a strategy which is full of lofty, unaffordable things, particularly when there’s an enormous amount that you can do in this space with not a lot of money. It takes time, and good marketing is iterative, so it takes the resource of time to think this stuff through and also to do it a few times and learn what’s working. But particularly these days where we’ve got social media channels and websites and a lot of different media outlets there are ways to reach your audience and market your product in ways that are inexpensive. But it’s worth putting some thought into what resources you have and what you can free up in the future to do this well.

Another really big influencer when you’re starting to think about how this is going to work is what does your Board think of marketing and its associated expenditure? That connects to this idea I brought up before about many people have a perception that this stuff is not worth doing, and that’s generally because they think it’s just a bit sort of hippy-dippy weird, like it’s all sort of hand-holdy, “Let’s all have a chat or get some attention”, or just inexperience. A lot of people are on Boards because they are rightfully experienced financially or for the sector that you’re in. If you don’t have someone on the Board who has a communications or marketing background, then it is really worth taking the temperature of their expectation of this sort of stuff, because it will influence effectively how you market marketing. Are you talking to a crowd who are keen to get started, or do you need to do a bit of work to explain the value of this stuff? And this process we’re talking through today is a way of identifying why this is worth doing and how it can be done.

And then another key point: What’s the difference between a marketing strategy and a plan, which will become apparent through this presentation. But broadly speaking the strategy is the statement of intent, you know, who we are, what are we looking to communicate and who are we looking to communicate it to? Why are we doing it? What objective are we trying to achieve with our marketing? That's the document that's going to the Board to say, "This is why we want to do this and why it's valuable and what we need to do it."

The plan is how we make it happen. The plan is where the tactics live. And it's an important distinction, because otherwise you can noodle away on a strategy for the rest of your life, putting every sort of widget and box and dice and things, but you want the strategy to live free of the nitty-gritty because it allows you to tell that story to all your stakeholders and it frees the plan up to just get on with the job.

# Slide 11:

## Understand your organisation

So, starting at the start of who you are and what you do: Understanding your organisation. So can you define your vision and mission? Is the vision that everybody with a disability in a particular geographic area has a certain level of care, for example? Or is it is your mission to ensure that your organisation is sustainable because it has diversified its funding base beyond the government by 45 percent? These sort of things.

Each organisation will approach the creation of a vision and a mission differently, and they’ll generally have some [inaudible] of external and internal needs. But having that vision and mission front and centre is really important, because it explains the soul of who you are, particularly when we talk about [inaudible] and leadership. The way that an organisation choose to articulate that vision and a mission explains a lot about where their priorities lie and the language that they use, which is really helpful in terms of building a marketing practice which is reflective of truly who the organisation is.

Because something that I’m sure we’ll come back to again and again is that - something to be kept in mind is trust as a cornerstone of marketing. It’s a cornerstone of any public communications you’re doing, particularly for you in your sector. Purely commercial organisation who are selling sugary drinks or something, they want to foster trust in an audience as well because it gives them brand loyalty, but they have other tools in the box, right? If they take a knock on trust because something comes out that they’ve done something bad, they’ve still got a lot of other functions that they’re doing to work with while they rebuild trust. This sector is, you know, it’s care, it’s humanity, it’s vitality. Trust is a really potent currency, and losing trust is particularly hard to get back from.

So in terms of – that’s why I talk about defining your vision and your mission at the outset and really understanding what it is. It’s so important, because when you push the button and start marketing and projecting your reputation, it needs to honestly align with who you are. The risk of doing a big shiny marketing thing which is speaking to someone you wish you were but you’re not actually, that could backfire if that becomes known. If you’re marketing something which is disingenuous, that’s a problem because it can shake peoples’ trust in you because they feel like they’re not being treated authentically, so that’s something to keep in mind.

So understanding your vision and your mission. If you go out and look for it and it doesn’t exist, this is a good chance and an exercise to start thinking about what that could be, articulating that. Your mission: What are you trying to achieve? Your vision: What do you want your impact on the world to be? And how does it define you?

Understanding your existing brand and what that means, which is, you know, the brand as a physical sort of an image people look at and recognise as you, but also what does that brand signify and how does it make your audience feel? So do you have a brand, and do you know what it stands for? And when you’re asking, “What does our brand stand for”, taking the time to ask people who haven’t seen it before, or asking your customers. Because generally speaking, if you’ve never done this before, sitting around the tearoom and going, “Well, what does our brand stand for”, you’ll probably get a different answer internally than you might get externally, which is not to say that that’s a negative thing. It’s just quite natural that the people who are working on the brand see it differently as the people who are encountering it out in the world, and the people who are just walking past it at the bus stop.

Getting a bit more granular: What are your core service offerings under the NDIS, and how have they changed, is an important thing. For many people, NDIS, it’s a seismic change for the sector. You could be moving away from a block funding model to more needing to attract customers, which may be why you’re looking into marketing in the first place. But really understanding that story and who you are and what you’re doing is a really important part of the marketing, because, again, you want to authentically push who you are and what you’re doing.

Because that leads into what is your point of difference? You will be aware, simply because you are a human being that exists on planet Earth in 2018, that there’s a lot of people marketing a lot of stuff all the time, and a lot of it’s pretty forgettable and a lot of it’s the same. The amount of messages you will be exposed to in your day to day life is staggering, and the human mind’s ability to maintain sanity by screening a lot of the noise out is quite impressive, so you want to cut through. The point of this is to reach your audience’s mind and grab their attention, and from there lead them back to you, so you need a point of difference. That could be anything. It’s got to be a pretty sort of searingly honest conversation about who you are and what you do, about what is your point of difference.

It could be that you offer a service that no one else does. That’s a very obvious point of difference. Or it could be you operate in an area where you’re the only one, or you do something completely unique. If you’re in that position, that’s good. That’s a very clear point of difference. Most people are not in that position and their point of difference is something more nuanced, and some of them it’s imagined or exaggerated. But your point of difference could be you understand your community better, or you provide service that no one else does, or to a quality that they can’t, or you’ve been there the longest, or you’re the newest and most interesting. It could be anything, but it’s just got to be something that competitors can’t also claim, because that allows you a hook to hang your story off of. You can go out into the world and say, “We are unique in this aspect.”

And that forms your value proposition. Understand your point of difference: “What makes me a super-unique megastar”, so that you can go out in the world and go, “what is my” – by value proposition – “what is the point? I’ve got your attention. I’ve stopped you in the street with my marketing. I have one sentence to tell you why you should follow me back to my exciting seminar or subscribe to my newsletter. Why would you do it? What’s the point?” Value proposition is sort of the polite way of saying, “Who cares?”

Think about why people would care. A good way to find that out is to ask what existing clients tell you. What do they tell you do best? Because your clients, they’ve identified it. If you don’t know what it is, your clients have, because they’re there. The only reason they’re there is because you’re giving them something that they like and something they can’t get from someone else better. So they are just a baked-in research panel who you can go to and find out why they’re there, what sets you apart, and why do they stick around? Take really close care of what clients have to say about you and who you are.

And that feeds into how well you tell your story, and this is trying to close the gap between – you know, if you’ve never done marketing before, as I say, you sit in the tearoom and go, “Why don’t people understand who we are?” That’s a very common tearoom convo, right? You know, “We’re doing all this work. We know that we’re great. We’ve been funded. The submissions are good. The evidence is there. People just don’t know who we are,” and then going out into the world and clients and asking what they think and you’re getting different answers. The storytelling of who you are and what you do is how you close that gap. So that’s about understanding what it is that you understand about you that the outside world doesn’t, and what’s the story you can tell to get them on the same script?

# Slide 12:

## Research

So that’s a lot of big woolly ideas about who you are and what you’re doing, and how do we do that? Research. Research sounds like 4000 people in a weird library for a thousand years, but it doesn’t have to be that. Research can be free and easy and engaging. And research is one of the – research and evaluation are the two things whenever marketing is undertaken or communications campaigns – they’re the most undercooked bit, because they’re inherently less exciting than the doing and the shiny stuff. But research is really important because, as we’ve been talking about, you can’t really take informed action unless you understand what you’re trying to achieve, and you can’t understand what you’re trying to achieve unless you know what you’re trying to change, which means you need to really understand what’s going on at the moment.

The best way to do research is to find people who’ve already done it and take it. I like to call that efficiency. So have a look around. There is a lot of research being done every day, so chances are if you’ve got a topic that you’re looking to find out more about, looking for details about your market, your product, competitors, similar things that have worked and stuff that’s failed, there will be existing research out there that is free. People will have done research on the sector. Governments generate a lot of research reports. Dig through that and pull everything you can out of that that’s instructive before going any further, because a lot of the time you can get everything you need out of free existing research, and there’s no need – there’s never any need to reinvent the wheel with this stuff.

There’s also the option of paying for research, which is if you’re looking for something very specific. Or if you’re looking to do a really big piece of marketing work it can often be worth paying for research if you’re looking for something really idiosyncratically matched to what you’re trying to achieve.

Another obvious place for research is what we call the customer lifecycle, which is mapping out with your customers, potential and existing, what is the lifecycle of their involvement with your organisation, which is really just mapping every contact point they have with you and every decision point. That’s a key thing that you’re going to want to research. So for example, home care: Who is the person, who is the customer? Imagine who they are, or find a real one, and just map out: When did they first hear of you? When did they make the decision they needed to look for someone like you? When did they decide that they would stop being interested and purchase? And when did they decide that they would stop purchasing? When did they decide they would step off, step on, change the nature of their relationship, all of those things, because then you’re identifying the key moments of acquisition.

Because, again, it’s all understanding. You’ve got a customer. You put messages out. You could just wait and hope that people rock up. But by mapping the times that people are receptive to this, you know, when is it in someone’s life that they are looking to engage someone like you? And when your customers are leaving, do they generally leave after a year? After two years? [Inaudible] with a common complaint? All these things, because then you can identify ideally the two or three times that people are most likely to become your customers, and you can focus your efforts on that. That’s all about efficiency and return on investment. Don’t try to talk to everybody all the time. Identify the most valuable moments when people are most likely to change their mind and become a customer and focus your efforts on that.

And that’s why customer segmentation is important. And that’s about looking at – my previous role was in emergency services, and it was particularly challenging because we would be issuing warnings for floods and that sort of thing, and you would look at “Who’s the audience?” and the audience is everyone. Everyone can go underwater in a flood. But segmenting an audience is valuable because people are more likely to respond to an action statement or a request or a call if they feel like it’s targeted to them, if it’s relevant to them. A general message that is equally relevant for everybody is a little less relevant for [inaudible]. Tailored trumps broad messaging. So segmenting your customers – you may have customers in different geographic areas that you could segment, or different age ranges, different lifecycles, different experiences, whatever is most relevant for your service offering - segmenting, taking the time to put a map together of your customers and segment them as granularly as possible is valuable because it allows you to target those marketing messages in a way that’s much more likely to convert people into customers.

For example, a common practice in digital marketing, if you have an online store for example, segmenting customers into the very specific segment of people who have put something in the cart of your online store and then left before they bought anything. That’s a specific segment who in the next 12 hours, if you send them an email saying, “Hey, we saw you put something in the cart but you didn’t buy anything. Would you like 10 percent off?”, they are likely to go, “Yes, yes I would,” because they were very close to buying something and they just need a little push to show that you care, right? But that message is not relevant for anybody else, so customer segmentation allows you to do messaging that you wouldn’t normally otherwise do in a way that’s quite valuable.

# Slide 13:

## Understanding your market

And so to do that you need to understand your market. Who is your customer? What are the customers doing? We’ve sort of talked through this, but, yes, retention is cheaper. You don’t want to put all of your effort into just getting new customers. Because if you – it’s the same as a business putting all their money into recruitment but when people get there on their first day there’s no computer and everybody’s super-mean and it smells weird so they just go work somewhere else. That’s not a good use of your money because you’re constantly training new people. Retention is much cheaper, so you want to put effort in marketing to your existing customers.

You know, electricity retailers, it’s now sort of common knowledge that they entice customers with deals and then quietly put people onto bigger plans after a year, and you can see that eroding the trust in customer bases and it’s slowly training their customers to churn through and look for better deals. So you don’t want to be in that position. You want to create an environment where, when people come and buy things from you, they feel valued and they feel like it’s always a new, exciting opportunity to hang out. You want to start on that retention, capitalise on what you’ve got, make sure you’re getting as much business from your existing customer base as you can, and then grow out from there. Expand your customer base. Look for ways that you can use what you’ve learned there to enter new markets, because it’s more efficient, it’s easier and it’s cheaper than constantly just picking a whole new market on the other side of the world, or a new demographic that you know nothing about and having to start the whole process again.

And again, because I’m good at PowerPoint presentations, this is a slide that sort of talks through things that I’ve already talked about. Different audiences require different information. I think a good thing that that pie chart puts forward, though, is once you’ve segmented them, weighting them is also really good. If you’ve got three segments of customers there but one of them is bigger, then you can put your resources more towards the one with the most people in it or that have the most likelihood of becoming customers.

# Slide 14:

### Understanding your competitors

Another really key but often overlooked part of this is understanding your competitors. And part of it is, as I said before, there’s no need to reinvent the wheel for any of this stuff, and so understanding your competitors is a really good way of getting a lay of the land, because you can see what people are doing that’s working. There’s no better way to understand what you should be doing than finding someone who’s doing the same thing as you and just going through their marketing and go, “Ooh, that’s cool.” Anything that you think, “Oh, that’s cool”, that’s something that you should really examine and pick apart. Why do you think it’s cool? What attracts you to that, and what lessons can you learn from that that you can steal? Well, we shouldn’t say “steal”: Implement on your own.

So understanding your competitors is obviously just identifying who they are. It could be people working in the same field, location, municipality, offering the same services. It could be things that people perceive as – anyone your customers would perceive as a competitor even if you don’t think so. You might think that you’re quite different, but if customers put you both in the same bucket they’re worth investigating. And then just picking apart what they’re doing and why it works.

And then another good trick is really seeing if there’s opportunities to team up with them. Is there ways to collaborate or partner, because you might be able to share resources. If you’re both working towards the same goal that you can both benefit from, why not?

# Slide 15:

## Stakeholders

And then broadening it out from there: Stakeholders. Again we’re tile by tile filling in a map of the terrain of who you are and what surrounds you. So stakeholders: Who are your key supporter groups? Who’s got your back? Who can you be using to send your message?

And then you want to again segment that as best you can to target your information. So who are all your key stakeholders within each region that you work in, and then looking at them in terms of can they collaborate with you on this marketing exercise that you’re looking to undertake? Will they share information for you, and if so, how would they do it? And if they’re willing to, what would they need from you?

Because it’s good to have stakeholders. It’s good to have partners who support your organisation, because you know if someone goes to them and asks about your organisation they’ll give you a good reference, so that’s good. That’s a good thing to have. What’s better is having a stakeholder who will proactively share information about you, because then that is a third party reference going out into the market, and people implicitly trust that a lot.

What’s even better than that is you going to those stakeholders, proactively understanding what’s in that for them and why would they do it, and then making it super easy for them. So having that holistic understanding is really beneficial. Being able to go to a stakeholder and say, “Hey, here is a marketing message. I would like you to put it out for me, and here’s the benefit to you and we can both benefit from this and let’s do it,” is a really efficient way of doing marketing.

Again, in my previous role, emergency services, we would have, you know, if we were doing a campaign about safety for example, we would put together packets of messages that we would like our partners to send out, but written from their perspective and tailored for them, so all they had to do was press send. And we would make it very clear to them, you know, it would further their brand. If you have stakeholders who support you, being seen to support you is a benefit to them, and so articulating that to them.

And that just extends the message in ways that you can’t do. Because when people get a message, a marketing message or something asking them to do something, they need to get it a few times before they act is one thing, and another thing is that people will most likely, before they take action, they will seek verification. They want to know that it’s true, and the most powerful way of quickly showing someone that what you’re telling them is true is third-party corroboration.

So if you think about it, you know, someone [inaudible] double-glazing on their windows, a lot of people, if they know their neighbour, will ask their neighbour, “Are you going to get this thing?” You want someone you trust to verify “This is a good idea. Yes, you should do this. This makes sense.” So getting your stakeholders on board and getting them to send your messages does all that sort of automatically, and it’s really powerful.

# Slide 16:

## Risk analysis and mitigation strategies

Equally important: Risk analysis, mitigation strategies. You really want to think about what the risks are. [Inaudible] publishing. It’s speaking in a public arena. That is an uncontrolled environment. And that’s fine. That’s quite easy to navigate, but it’s just important to really think about what the risks are and that you are proactively managing them.

So think about the messages that you’re sending. Could they be misconstrued? Are they relevant for every audience? Is there anybody that could be offended? Those are – you know, are your existing customers – a common one is someone sending out a really broad marketing message about, “Hey, all new customers get this super-special deal you can’t get anywhere else,” and then getting a lot of emails from their existing customers saying, “Hey, how come - I’ve been with you for 10 years. Why are you being so nice to the new people? Where’s my 10 percent discount?” So just thinking through the implications of what you’re saying to just understand what it is can just help you head it off at the pass.

And yeah, popular risk mitigation activities: In that example it’s segmenting the audience. If you’re giving an offer [Inaudible] to new customers, do your best to make sure that new customers get that message and the old customers don’t, because it’s not relevant for them, so you’re wasting money and time talking to an audience who can’t use it. You’re also risking putting them off-side.

And also continue [inaudible] information. A risk of marketing is obviously that you start this big thing and then through some kind of disruption you can’t do it, or you don’t have the resources to do it.

An odd risk of marketing is too much success. If you are a small organisation with one person who runs your social media every Wednesday and Thursday, do you have a mitigation strategy in place that if you put the competition out on Thursday afternoon and it goes completely gangbusters at the level where you just cannot keep up with it, so having activities in place to mitigate that. And for that one it’s just about timing, understanding who is responsible for this information, and if a lot of conversation is generated, who is going to manage that and how are we going to do it?

In terms of if you are a small organisation that’s hoping to make something go viral for example, having holding statements in place so that if an enormous amount of activity is generated and you get a lot of attention and people are calling, do you just have one statement you can put out to sort of cover all that off in a way that is feasible?

And then another risk mitigation thing, what happens in the opposite, if no one calls in and there’s nothing to do, and that’s about creating material that, even if it doesn’t achieve this marketing thing, we could be using it on other channels, making sure you’re not wasting your effort.

# Slide 17:

## Creating your marketing strategy – linking business and marketing objectives

But let me know in the questions if anyone has any particular risks that worry them before they step into this space.

Creating a marketing strategy: As we talked about, important to link it to the business and marketing objectives. It’s really about telling your story. Case studies, case-based marketing is a really valuable way of doing it in terms of – because stats and figures and things are really powerful, but you really want to make sort of an emotional connection with your audience. So by telling your story, using a narrative, characters, having customers - demonstrating a successful relationship you have with customers are a really powerful way of doing it. And then aligning that to your business objectives means that – that’s where you start seeing people go, “Oh, this is just telling a nice fuzzy story.” - but by aligning it to those business objectives, the vision, the mission and the values, that’s when you’re really cooking with gas because everybody’s moving to the same beat. That was a horribly mixed metaphor and I apologise.

And then the other crunchy bit you’re wanting to look at is when you’re going to evaluate success and why. And that’s why it’s important to have this linked to comms objectives. It’s important to underline here that we’re talking about that linking your communications objectives to your business objectives, but you don’t want to do a comms strategy which is just talking specifically about having your business objectives baked into your strategy, because a comms strategy is looking to evaluate and enable communications. So for example if your organisational objective is to grow by 10 percent, you want a comms objective which enables that, but you can’t expect communications to just rest on that. So for example if we’re looking to create 400 new customers for a particular service in the next quarter, your communications objectives around that might be about creating 400 new leads, generating 400 impressions to the Facebook page, getting people to call in. That’s a comms objective, but what happens after they communicate with the business is outside of the control of the comms, if that makes sense. So you don’t want to rest it all the strategy, otherwise something outside of the span of this work could undercut it and it’s a recipe for failure.

I’ve had a question come in about thought: “Do you have any thoughts on negative social media [inaudible]?” Which is a common question, because there’s nothing more irritating, because social media is like – social media is really powerful as a way to emotionally connect with people, but it’s public. An important thing of social media is that the way that it’s designed, you never want to delete things that customers put on your social media, which is hard if people are frankly huge jerks. And sometimes people are going to be huge jerks and leave negative things. The way I like to think about it – because if you delete it, [inaudible] in the armour of the trust you’re building. If someone says something negative on your Facebook page and you delete it, there will be a percentage of your audience who will look at that and go, “What are they trying to hide?” And that’s not fair, but it’s where people are going to go, and you’ve lost trust.

What you want to do, if someone’s saying negative things that are untrue on your Facebook page, you want to use that as an example to prove that it’s untrue, and then you want to use that as an example to prove that you are fantastic. So if someone puts something that’s unfair on your Facebook page, you want to respond to that respectfully in a timely manner to explain that you want to acknowledge their emotional truth, which sounds a bit wooly but if someone comes in really mad and yells at you, a lot of the time all they want is someone from your organisation to say, “I hear you. I’m sorry that happened.” But if you did nothing wrong, just tell them that you understand, you’re sorry that they’re upset, but here’s the facts as they work and then use that as an opportunity to tell a little story about how it’s actually – you know, the truth is an example of how good you are.

What you’re doing is, like, it’s a secondary concern to try to get this negative person back on-side, frankly. If they’re negatively lying on Facebook, you probably don’t want to hang out with them anymore. So what you want to do is neutralise the risk of them by saying you understand them and proving to everybody that it’s not true, but you want to use that as a soapbox from which to broadcast to the audience. So see it as an opportunity, like, “Oh, this person’s a jerk, but we’re going to show everybody that we’re great.”

So I hope that helps.

# Slide 18:

## Creating your marketing strategy – the structure

Now, [inaudible], now that I’ve peppered you with effectively, ask every question about everything you’ve ever thought about ever, is to talk about the crunchy bit. Like, that’s “Cool story, Stefan, nice glasses, but how do I actually create a marketing strategy? What is the structure?” Which is good because we’ve had a question come through: “Do you have a template or key points to develop a marketing strategy?”

It’s hard, because, as we talked about before, it’s very easy to – I’m particularly – I’ve been on a journey that I think everybody goes on, because we all in our careers start in tactics and then slowly move into more sort of strategic, working on the business sort of things. So I think we’ve all been through a point where we’re like, “Strategy? Bah, what’s the point? Let’s just do it. Stop talking about it. Let’s get it done. You don’t understand what it’s like here at the coalface. Huzzah!” It’s a very natural place, but strategies are really important as sort of that scene-setting foundation stone document.

And yeah, it’s very easy to just tip over into doing the planning, because that’s, frankly, that’s the funnest bit. Audiences and stakeholders and all that stuff, it’s really important and valuable, but it’s when you get to, “Oh, here’s what it’s going to look like when it’s on the telly,” or “Here’s what we’re going to do at the seminar,” or “Here’s the workshop we could do,” and “Won’t it be fun when we get to do the…” That’s the core bit, but hold off.

So your marketing strategy should include these elements.

### Introduction:

You want to write a marketing strategy. When you’re writing it, imagine you’re writing it to the member of your Board who’s – and if you don’t have this person, imagine they exist – the member of the Board who’s super-keen to be there, but they’re really busy so they’re sort of 20 percent aware of what’s going on. That imaginary person is the perfect audience for a document like this, because it will remind you to keep explaining what you’re talking about and not cut corners. And particularly this introduction, that’s where you can demonstrate the benefits of that research that you’ve done and the understanding that you’ve gone out and gathered.

So an introduction should be: Here is who we are. This document exists for X reason. We understand that we are looking to achieve this as a business. We want our marketing to do this sort of thing, and here’s what’s happening in the universe at this point in time. This is why we’re writing this for you now.” And if you - regardless of who approves the strategy – if you write it for that semi-detached Board member, it will give you [inaudible] help, because you will be writing it from that sort of – they are informed. You don’t have to explain everything about where the organisation came from and when it was founded, but you’re explaining why we’re doing this now and what the point is.

### And then you want to go to your objectives.

So the first thing: Objectives. These are the north star guiding principle of your strategy. I generally look for a big, overarching goal – “This strategy is looking to do this,” – and then try to have three objectives under it as a ballpark. Any more than that you start to get into the weeds, any less than that it’s hard to articulate them well. And with those objectives you immediately want to show how they link back to your broader business objectives. This is where you’re managing up, giving that assurance that this plan is connected to every other plan and this is the mechanism that shows people that when we get into the business of the pressing of the buttons and the telling of the people, this is driving our business. This is really valuable stuff and we need to do this. And look – the strategy we did that we didn’t know how we were going to do it last year? This is how we’re doing it and it’s exciting.”

A page on the brand is really good, because that’s a vital part. Everything needs to be driving the brand and linked to the brand. If you’ve got branding guidelines, which could be a graphical style guide – you know, “This is the colour blue that we use,” that sort of thing – put that in. If not, just a few points about “when we use the brand, this is how we do it.”

### Key messages is your next page.

And these should be sharp, succinct: “Who are we? What are we doing? Why? Why are we different?” These are the things that you can print off, give them to someone, they can talk about it. You grab one of these messages and chuck it into every engagement you have with somebody and you are driving your business forward.

Stakeholder engagement strategy, which at a basis is that segmented map of your stakeholders: Who are they? How can they be involved in marketing? What do they need from you? Who’s the contact details? Who in the business owns that relationship? Why are we talking to them? When are we talking to them? And what are we saying to them?

### Competitor analysis:

Again, a summation of what we’ve learned. “Who is out there in the business? Who do we need to take down because they’re the best, or, if we’re the best, who do we need to keep down because we’re super the best? What are they doing well? What can we learn from them? And what have they done which we view as potholes that we should avoid?”

Define each thing that you’re doing…

So we’ve just had a question come through: “Do you create a new strategy for every campaign? How often do you need to create it?” It’s pretty idiosyncratic depending on your [inaudible] of what you’re doing. If you are an organisation that has not played in marketing before I would generally do one strategy which you view as [inaudible] in this business. I would do a twelve-month strategy and I would look at it in a year and see where we’re up to. Some places do a different – and I would do an overarching – if you’ve got to develop marketing strategy, I would do a marketing strategy which is in the same update mechanism as your strategic plan, because then everything’s aligned, and that might be two or three years at a go. And then the strategy drives everything you’re looking to achieve and you can do a really crisp plan for every new campaign that you’re doing. But if you’re doing lots of very different campaigns you may need a strategy for each one. It really sort of depends what you’re doing, and I apologise if that’s a bit of a wooly answer.

But if you’re new to the space, I think, yeah, the general load out, do a twelve-month one to start to figure out how it works and what works and what doesn’t, then align it to your overall strategic plan update [inaudible], and then silo it off for each campaign. In there you want to have – because if you’ve got your campaigns defined you can include each of them here in this service – you can have them in there as a service offering. So for each one: “What’s the market you’re looking to do? How are we going to measure success? And when are we doing? And then for each one, how are we going to evaluate success?” And that’s based on what you’re trying to achieve. “Are we looking to get engagement? Are we looking to get clicks to the website? Do we need subscribers? Do we need people to do a specific thing? How do we do it?”

### And then the marketing mix.

Which is just what are the tools at our disposal? You may have a website, a Facebook page and a newsletter, for example, or you might have a national advertising campaign, a national network who are willing to put it out. This is where you list exactly why the mix of marketing things you have, because then when you get to your planning you’re able to just press go.

# Slide 19

And that’s the last slide, which has then clicked back to the sort of weird desktop thing. But I think we’ve got 30 seconds to go, so if anyone else has any questions I’m more than happy to answer them.

Thank you everybody for your time. I really appreciate it. I’m very nerdy about this stuff.

We’ve got one last question. Just before I do that I just wanted to let everybody know that because I’m such a nerd about this stuff, if you have any other questions, reach out. You can get my contact details. I’m happy to have a discussion or come visit you and we can talk about marketing until you get so bored.

But yes, we’ve had one last question:

## “How do you rate different marketing mediums?”

I think for – working on a presumption that you’re starting from the start, if you’re new to marketing and you’re a bit light on for resources, it’s pretty hard to go past social media in terms of a lot of return on investment, because the marketing you can do on social media can be so cheaply targetted that you are getting messages out to a really broad audience without wasting a single dollar on anybody else.

So if you’re looking to only talk to people who have shown an interest in your corner of the world, your topic, they only live in an area that you service, you could target that. And that way, instead of paying money for an ad at a bus stop, you’re only paying for the eyeballs that you want to see your thing. So I think that’s a really good place to start. I also think, in terms of the space that you’re all playing in, as I say, defined by trust, connection, emotion, care, you are looking to [inaudible] to keep people safe.

I think radio is really good. Radio is a great medium to make an emotional connection, and that’s played out time and time again.

TV – you know, we hear a lot about traditional media shrivelling up, and it’s definitely taking a back seat to the digital stuff [inaudible] connecting with people. It’s just that it’s rarely affordable.

And lastly, a recording of this webinar will be made available to everybody once we’ve captioned it, and that will probably be [inaudible] copy of all the slides and the presentation, including my, I assume, engaging and fascinating voice.

But great, thank you everybody. You are free to resume your lives, and I look forward to talking to you next time.

# Slide 20:

# National Disability Services

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