MARKETING PLANNING PRO WITH AI

FOR NONPROFITS

Instructions to Help Your Nonprofit Organization Build a Rewarding Strategic Marketing Plan With Easy-to-Use Online Tools

MARKETING CONVERGENCE SOLUTIONS

Marketing Planning Pro for Nonprofits

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Instructions for Answering Questions
To Build Your Strategic Marketing Plan
Using AI Powered Online Forms

Use These Instructions for Answering Questions in Online Forms to Create Your Marketing Plan That Measures Results

Can You Explain How Your Marketing Performs?

Throughout my career leading marketing teams, for both business and Nonprofits, I was frequently asked to quantify the value of our marketing efforts. Senior leadership often wanted to know, *"What kind of return can we expect from this campaign?"* or *"How will this plan impact revenue?"*

In other words, they wanted marketing performance explained in terms of **actual organization results.**

That's why it became imperative for me and my teams to align specific goals and Key Performance Indicators (KPIs) before launching any new marketing initiative. We didn't just "do marketing," we set clear expectations for what success will be.

Just as important was our commitment to tracking performance during and after execution. These insights could guide our future decisions, what to keep doing, what to stop, and where to optimize.

This is exactly why in-depth marketing planning is essential. Without thorough analysis, goal setting, and clearly defined KPIs, marketing becomes little more than guesswork. Objectives, strategies, and tactics without measurement are just a shot in the dark.

And that's why I've designed this guide, with its instructions, examples, and online planning templates powered by AI: to help you simplify the process of building a strategic marketing plan that walks you through each step, from setting goals to launching campaigns.

Step 1: Getting Started

Start your planning by reviewing this Marketing Planning Pro planning guide and the online forms and instructions in detail.

It's organized in logical sections that help you define your purpose, analyze your strengths, define your donor base, set measurable objectives, and outline actionable tactics. Fill in each part as you go, using the examples provided as inspiration. Don't worry about being perfect, what matters is clarity and commitment to follow-through.

Think of this as both a **workbook and a playbook**. As you complete each section, you're not just writing a plan, you're building a focused, data-driven strategy that helps you make smarter marketing decisions, connect better with supporters, and ultimately grow your organization.

Use it, revisit it often, and adjust your tactics based on what works. This is your roadmap to more consistent and effective marketing.

Additional resources about planning can be found at our website, www.marketingconvergencesolutions.com.

Step 2: Select the Planning Team

Start your planning by assembling a small, cross-functional planning team that may include:

- Development Director
- Program Manager
- Communications Lead
- Volunteer Coordinator
- Finance/Grants Officer

Use this team to brainstorm, complete each section collaboratively, and bring real-world insights into the planning process.

Step 3: Planning Meeting Preparation

Once your team is in place:

- Distribute Materials: Share this planning outline, definitions, and examples with all team members in advance. Allow time for review and preparation.
- Schedule the Planning Session: Choose a date and ensure the team is available for a focused, uninterrupted session.

Step 4: Facilitate an Effective Planning Session

Create a productive, engaging atmosphere:

- Use flip charts and whiteboards to capture input and visualize ideas.
- Ask questions and prompt discussion for each section of the plan.
- Ensure the environment is comfortable: provide good seating, regular breaks, coffee, drinks, and snacks to maintain focus and energy.
- Make sure that someone is appointed to take detailed notes of the discussions

Step 5: Write the Marketing Plan

Using input from your planning team, insights from the planning meeting, and your own expertise, complete the strategic marketing plan by filling in the questions found in the **Marketing Plan Pro Online Forms.**

You may find it helpful to assign specific sections or questions to different team members based on their roles or areas of expertise.

Use the AI Assistant with help in formulating and editing your answers.

Here are the sections of the marketing plan that are covered in this guide.

Section I: Our Organization, Branding, Supporters, Services, and Programs

Section II: Developing Your Marketing Plan Deliverables – Marketing Objectives, Strategies, and Tactics

Section III: Develop a Marketing Budget Summary and ROME

Section IV: Executive Summary

Lean on AI for Help in Developing Marketing Tactics

The built-in **Marketing Planning Pro AI Assist** and others such as **ChatGPT, CoPilot, Gemini, and Claude,** can be used to develop marketing tactics by translating tactics for marketing objectives and strategies into specific, actionable plans, such as campaigns, messaging, content calendars, targeting, and platform recommendations.

AI tools can analyze market trends, supporter behavior, and performance data to recommend and even generate creative assets tailored to your strategic goals.

How AI Helps Map Strategy to Tactics:

Step	AI Contribution
Define objectives	Helps refine goals using SMART criteria and industry benchmarks
Align with strategy	Ensures tactics align with positioning, supporter targeting, and core messaging
Suggest tactics	Generates campaign ideas, channel plans, content formats, and timing suggestions
Automate content creation	Creates social posts, ad copy, images, and hashtags based on tone and supporter
Personalize messaging	Segments supporters and tailors content for each persona
Optimize performance	Analyzes engagement metrics and suggests adjustments for better results

Section I

Our Organization, Branding, Supporters, Services, and Programs

Question 1. Write Your Company Description and Branding

Provide an overview of your organization, including its legal name, founding year, leadership, and core mission focus. Describe your brand identity — what values define your organization, how you wish to be perceived, and the tone or imagery that represents your mission.

Then, describe your branding strategy:

- What does your brand stand for?
- What is your value proposition?
- What visual elements (logo, colors, style) represent the brand?
- What tone of voice do you use in communication?

Question 2. Write About Your History

Summarize key milestones: founding story, growth of programs, partnerships, and community impact over time.

Question 3. Write About Your Core Values and Culture

List 3–6 guiding principles that shape your organization's behavior and decision-making. Explain how these values influence staff, volunteers, and supporters, and how they support your mission.

Question 4. Write Your Mission Statement

State your core purpose: What do you do, for whom, and why? Keep it concise, compelling, and aligned with your impact goals.

American Red Cross Mission Example
"The American Red Cross prevents and alleviates human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors."

World Wildlife Fund (WWF) Mission Example
"To conserve nature and reduce the most pressing threats to the diversity of life on Earth."

Question 5. Write Your Vision Statement

Describe what your organization aspires to become or achieve in the long term. It should inspire your staff, donors, and community partners.

American Red Cross Vision Example
"The American Red Cross, through its strong network of volunteers, donors and partners, is always there in times of need."

World Wildlife Fund (WWF) Vision Example
"To build a future in which people live in harmony with nature."

Question 6. Write About Your Programs and Services

List and describe your primary programs, initiatives, or services. For each, identify the target beneficiaries, the needs addressed, and measurable outcomes.

Question 7. Write About Your Community Position

Explain how your organization is positioned within your cause area. Highlight your distinct approach, trusted reputation, or innovative service model.

Question 8. Write About Your Primary Supporter Segments

Define your primary supporter groups — individual donors, foundations, corporate sponsors, or volunteers. Include motivations and engagement behaviors that drive their involvement.

Question 9. Write About Your Beneficiary Segments

Define your primary beneficiary groups — who they are, what challenges they face, and how your programs meet their needs.

Question 10. Write About Your Geographic Reach

Describe your current and planned service areas — local, regional, national, or international — and delivery channels (in-person, virtual, hybrid).

Question 11. Write About Your Future Organizational Goals

List 3–5 measurable goals over the next 1–5 years related to mission impact, program expansion, funding diversification, and community engagement.

Key Characteristics of Strong Nonprofit Goals

- Mission-aligned: Directly support the organization's core purpose
- SMART: Specific, Measurable, Achievable, Relevant, Time-bound
- Balanced: Include both *programmatic* and *operational* objectives
- Outcome-driven: Focus on measurable change, not just activity

Examples:

- *Mission and Program Impact Goals: Expanding or deepening the Nonprofit's core services or advocacy work*
- *Fundraising and Financial Sustainability Goals: Strengthening funding diversity and long-term stability*
- *Volunteer and Community Engagement Goals: Growing participation and strengthening relationships*
- *Awareness, Branding, and Advocacy Goals: Expanding public awareness and influence*
- *Organizational Development and Capacity Goals: Strengthening infrastructure and team effectiveness*
- *Evaluation and Accountability Goals: Demonstrating transparency and continuous improvement*

Question 12. Write About Organizations Similar to Your's

Describe:

- Their strengths and weaknesses
- How they are positioned in their community

- What makes your organization different or more effective in reaching supporters
- What makes your organization different or more effective in reaching beneficiaries

Question 13. Write a Summary of the Services and Programs You Offer Beneficiaries

When writing a summary of the services and programs you offer beneficiaries, consider both the functional details and the strategic positioning of each service. Highlight *why it matters* to the beneficiary.

Here's what to include and consider:

Service and Program Categories

- Organize services and programs into logical categories.
- Group similar services and programs.

Features and Benefits

- Clearly describe key features of each service and program.
- More importantly, emphasize the beneficiary benefits such as what problems the service and program solves or value they delivers.

Target Beneficiary for Each Service and Program

- Note which segments each service and program are designed for.
- Include how the service and program aligns with that beneficiary's needs.

Differentiators

- Explain what makes each service and program unique.
- Consider how it compares to services and programs similar Nonprofits offer.

Channels

- Indicate where the service and program is available (e.g., regions, specific communities).
- Highlight if a service and program is exclusive to a certain channel.

SWOT Analysis

A SWOT analysis identifies your organization’s Strengths, Weaknesses, Opportunities, and Threats. It helps align your strategies with internal capabilities and external conditions.

Instructions for Strengths:
Ask: What does the organization do well, and what gives it an advantage in attracting donors.
Examples: *Strong reputation, loyal donor base, experienced staff, or impactful partnerships.*
Tip: *Focus on what sets the organization apart and supports growth.*

Instructions for Weaknesses:
Weaknesses: May include limited funding diversity, inconsistent messaging, or capacity constraints.
Ask: Where is the organization vulnerable or underperforming?
Examples: *Limited funding diversity, inconsistent messaging, or capacity constraints.*
Tip: *Be honest. Identifying weaknesses is critical for planning improvements.*

Instructions for Opportunities:
Ask: What trends, gaps, or changes in the can the organization leverage?
Examples: New grant opportunities, shifting public interest, or potential collaborations.
Tip: *Look at both macro trends and category-specific opportunities.*

Instructions for Threats:
Ask: What external forces could negatively impact the organization in each of these areas?
Examples: Policy changes, funding volatility, or other Nonprofits in the same field.
Tip: *Monitor your environment regularly to identify early warning signs.*

Answer Questions 14, 15, 16, and 17 to Complete a SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) for **Donor and Public Awareness, Programs and Services, Contribution Levels, Program Delivery Channels**

Question 14. Write About Your DONOR AND PUBLIC AWARENESS Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Question 15. Write About Your PROGRAMS AND SERVICES Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Question 16. Write About Your CONTRIBUTION LEVELS Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Question 17. Write About Your PROGRAM DELIVERY CHANNELS Strengths, Weaknesses, Opportunities, and Threats (SWOT)

Question 18. Set Your Contribution and Grant Goals by Program and Service for Current Year, Year 1, Year 2, and Year 3

Set measurable contribution and grant goals based on:

- Past performance
- Trends
- Giving environment

Coordinate with key departments or people with your organization to validate projections for the next one, two, and three years.

When setting contribution and grant goals, planners must balance ambition with realism and ensure that goals are aligned with broader strategies. Below are the key considerations to guide the goal-setting process:

Align with the Organization’s Objectives

- Ensure goals support overall organization objectives (e.g., revenue growth, community expansion, program and service launch success).
- Coordinate with finance and executive teams for consistency.

Use Historical Data

- Analyze past performance by service and program, by region, channel, or other segment.
- Identify seasonality, trends, and patterns to create realistic baselines.

Make Goals SMART

- Specific – Clearly define what you want to achieve
- Measurable – Use concrete metrics
- Achievable – Stretch, but within reach given your resources
- Relevant – Tied directly to your organization’s priorities
- Time-based – Set deadlines (e.g., monthly, quarterly, annually)

Account for Market Conditions

- Consider economic trends, consumer confidence, and other external factor.

Plan for Monitoring and Adjustment

- Set checkpoints (e.g., monthly reviews) to monitor progress.
- Be ready to refine strategies or reallocate resources if you're off-track.

Tip: *Tie contribution and grant goals to incentives if you're managing internal teams or partners. Motivation and accountability improve goal achievement.*

Section II.

Developing Your Marketing Plan Deliverables – Marketing Objectives, Strategies, and Tactics

Develop your marketing Plan Deliverables which are the objectives, strategies, and tactics for:

- **Donor and Public Awareness**
- **Programs and Services**
- **Contribution Levels**
- **Program Delivery Channels**

Tactics will include specific, actionable plans, such as campaigns, messaging, content calendars, targeting, and platform recommendations.

AI can analyze market trends, supporter behavior, and performance data to recommend and even generate creative assets tailored to your strategic goals.

Here are definitions for each deliverable:

Objectives
Objectives should align with the overall marketing plan goals and serve as benchmarks for performance. Ensure objectives are **SMART**:

- Specific
- Measurable
- Achievable
- Relevant
- Time-Based

Strategies
Strategies should align with the strengths, weaknesses, opportunities and threats your planning team believes are important to address.

- Strategies: Outline how you will achieve each objective.
- Tactics: Provide specific actions, each with:
    - Implementation details
    - Assigned responsibilities
    - Timing and budget allocation

Tactics
Marketing tactics must deliver the results for the marketing objectives and strategies.

Examples of Tactics Include:

Promotions
Promotions and incentives must motivate your target supporters to participate. These incentives should provide genuine value and can include recognition, rewards, awards, mission-linked gifts, and exclusive access.

Messages
Messages must be clear and concise and communicates benefits and value. Persuasive language must highlight unique selling points, a call-to-action, and create a sense of urgency or exclusivity to encourage action.

Communications Channels
Leverage various communications channels such as email marketing, social media, website banners, SEO pay-per-click, print media, direct mail, influencers, and partnerships.

All tactics must include the following:

Performance Measurement
Each tactic should have performance measurement (KPI) to track its level of success (or failure). Measurements can include boost in donations, increased number of supporters, and new supporter leads.

Budget, Responsibilities, Timing
Budgets must be allocated for executing each tactic. Budgets must align with the expected Return on Mission Engagement (ROME). Assign specific timing and the teams responsible for implementing each task within the tactic.

Key Performance Indicators (KPI) for This Objective
Tactics must support each marketing objective's KPI (Key Performance Indicator) to measure how well the objective is being met. KPIs provide valuable insights into how well the marketing strategies and tactics are progressing toward achieving the objectives. In marketing convergence,
Examples of KPIs can include:
- *Increase in donations*
- *Donor leads generated*
- *Increase in volunteers*
- *Return on Mission Engagement(ROME)*
- *Supporter acquisition cost*

Timing
In what time frame will the objective be accomplished?
Example: *Develop in Q1. Implement in Q2.*

What Incentive Offer(s) Will Motivate the Target Supporter
These can include recognition, rewards, awards, mission-linked gifts, and exclusive access.
All must align with target supporters' interests and provide genuine value.
Examples of Measurable Tactics:
- *Host four quarterly community events or open houses to increase visibility and partnerships*
- *Launch a major gifts or planned giving program to strengthen long-term funding*
- *Build partnerships with three civic or educational organizations to amplify advocacy efforts*
- *Recruit and train 100 new volunteers to support ongoing programs by year-end*

Create the Message. Preferably the "One Thing" That will Convey the Offer to Motivate the Supporter to Donate

The message must be clear and concise and communicate benefits and value. Highlight unique selling points and create a sense of urgency or exclusivity to encourage action. Tailor the messaging to different communications channels and target segments if applicable.

Message Example:

"Your Gift Turns Hope Into Action"

You're the reason change happens — here's how you can do even more.

Every day, lives are being changed because of people like you.

*When you contribute to **[Your Organization Name]**, you help provide support, food, shelter, and opportunities for those in need.*

This year, your generosity helped:

- *Provide **over 5,000 meals** to families struggling with food insecurity*
- *Fund **job training and mentoring** for 200 adults re-entering the workforce*
- *Offer **after-school support** for hundreds of local children*

But the need continues — and with your help, we can do even more.

- *Your additional gift of **$50, $100, or whatever you can give today** will:*
  - *Put healthy food on more tables*
  - *Open doors to new opportunities*
  - *Give hope to people who thought they'd been forgotten*

Together, we can make sure that they help and hope never run out.

***Give Now**. Thank you for believing in our mission — and for being the heart of the change we're building together.*

Targeted Communications Examples:

Consider a Multi-Channel Approach to Reach the Supporter and Maximize your Appeal's Visibility

A multi-channel approach to targeted communications can deliver tailored messages to specific supporter segments. Different individuals prefer to receive information through various channels, and a multi-channel approach will meet supporters where they are most receptive. Benefits include higher engagement rates, increased brand loyalty, and better conversion rates.

Small organizations should prioritize the channels that match their supporter, budget, and capacity to maintain. A focused strategy using email, social, website, SEO, and some local paid advertising can be very effective. As they grow, they can test or expand into additional channels.

Communications Channel Example:
"Together We Rise" Multi-Channel Donor Engagement Campaign

Objective:
Increase donor engagement and contributions by 25% over three month.

Strategy:
Launch a coordinated storytelling communications initiative across digital, print, and in-person channels.

Target Audiences:

- *Primary: Current donors (renewals and lapsed supporters)*
- *Secondary: Prospective donors acquired through events, social media, or peer referrals*

Tactics:
1. Develop the Communications Theme
"When we lift one person, we lift an entire community."
Every gift — large or small — creates ripples of change: providing opportunity, restoring dignity, and building hope.
Key Message Pillars:

- *Impact: Real stories of lives changed*
- *Trust: Transparency in results and use of funds*
- *Belonging: Donors are part of a larger movement for good*

2. Develop the Multi-Channel Communications Plan

a. Email Marketing (Personalized and Automated)

- *Series of 3 emails:*
  - *Email 1: "You Make Change Possible" — share personal success story and invite recurring gifts*
  - *Email 2: "Double Your Impact" — announce matching gift challenge*
  - *Email 3: "We Couldn't Do This Without You" — celebrate progress and highlight upcoming initiatives*

CTA: *"Become a Monthly Supporter" with embedded donation link.*

Personalization: *Use donor name, past giving history, and specific impact area they supported.*

b. Social Media Campaign (Facebook, Instagram, LinkedIn, X)

- *Visual Series: Five short videos and graphics featuring beneficiaries and volunteers*
- *Hashtag: #TogetherWeRise*
- *Live Updates: Weekly mini-stories, short volunteer spotlights, and "Thank You Thursdays" donor mentions*
- *Paid Boosts: Target past website visitors and lookalike audiences based on engaged donors*

CTA: *"Join the Movement → Donate Now."*

c. Website and Landing Page

- *Dedicated Campaign Page: "See the Change You're Creating"*
- *Impact tracker (donations raised, people served.*
- *Embedded video storytelling*
- *Testimonials carousel*
- *Simple, mobile-friendly donation form*
- *Popup Reminder: Timed exit prompt: "Before you go — make your impact count today!"*

d. Direct Mail Appeal

- *Personalized Letter: Signed by the Executive Director with a real client photo and quote*
- *Incentive: Handwritten "thank you" postcard from a program participant for gifts over $100*
- *Follow-up Email: "Did you receive our letter?" linking to digital giving page*

e. Local Events and Community Outreach

Event Theme: "Night of Impact"

- *Small local gathering with mission updates, short video presentations, and live beneficiary testimonials*
- *Donor wall of gratitude displayed on-site and online*
- *Event recorded and shared across digital channels afterward*

f. Press and Public Relations

- *Press Release: Highlight campaign kickoff and community goals*
- *Local Media Outreach: Feature story about a family or individual impacted by donations*
- *Partnerships: Collaborate with local businesses to display posters or host micro-fundraisers*

Example: Objective, Strategy, and Tactics Execution for DONOR AND PUBLIC AWARENESS

Donor and Public Awareness Objective	Increase the average gift size and total giving volume across all programs.
Donor and Public Awareness Strategy	Implement supporter-focused awareness tactics that enhance loyalty, improve emotional connections, and perceived value in order to increase contribution frequency and amounts.
Target Audience	• Primary: Current donors (renewals and lapsed supporters, describe demographics TBD) • Secondary: Prospective donors acquired through events, social media, or peer referrals (describe demographics TBD)
Donor and Public Awareness Key Performance Indicators (KPIs)	• +20% average donation increase after campaign – total $210,000 • +25% social media engagement rate on impact posts
Donor and Public Awareness Measurement Plan	• Monthly reporting dashboards for loyalty metrics, donation lift, and campaign engagement • Quarterly executive reviews to refine messaging and budget allocation • ROME evaluation on each tactic with optimization based on real-time data

Donor and Public Awareness Tactic		
Create impactful storytelling campaigns that inspire higher giving through emotional narratives that connect donations to visible outcomes. • Launch a "Your Gift in Action" campaign showing the direct link between contribution levels and tangible impact (e.g., "$50 feeds a family of four for a week"). • Create short video testimonials from beneficiaries, staff, and volunteers showing transformation stories. • Use photo essays or digital storytelling to show progress made possible by donors. • Develop a "Before & After" impact series to demonstrate measurable change. • Share monthly "Impact Updates" via email and social media to reinforce ongoing need and donor importance.		
Responsibilities Teams	**Timing**	**Budget**
Development Director / Program Manager / Communications Lead	Launch in **Q2**, optimize in **Q3–Q4**	$50,000
Donor and Public Awareness Tactic		
Develop multi-channel giving awareness campaigns to make giving more visible, convenient, and top-of-mind. • Run coordinated awareness drives across email, social media, website, and local media focused on "Ways to Give.." • Develop a "30 Days of Giving" challenge featuring daily stories and suggested donation levels • Use geo-targeted digital ads promoting local giving opportunities. • Add donation links or QR codes to all content — print, events, social posts, and newsletters. • Utilize seasonal awareness events like Giving Tuesday or year-end campaigns with a matching gift incentive.		
Responsibilities Teams	**Timing**	**Budget**
Development Director / Program Manager / Communications Lead	Kick off in **Q2**, then monthly through **Q4**	**$30,000**

TOTAL BUDGET	**$80,000**
ROME*	**$163%**

*** Return on Mission Engagement (ROME) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100**

Example: Objective, Strategy, and Tactics Execution for Programs and Services

Programs and Services Objective	Improve donor contribution levels (average gift size and total giving volume) by strengthening the connection between program delivery and donor motivation, showing measurable impact, personal engagement, and clear outcomes.
Programs and Services Strategy	Focus new programs on supporter-centric product initiatives, innovation, and portfolio optimization to meet evolving market needs.
Target Audience	• Primary: Current donors (renewals and lapsed supporters, describe demographics TBD) • Secondary: Prospective donors acquired through events, social media, or peer referrals (describe demographics TBD)
Programs and Services Key Performance Indicators (KPIs)	• +15% increase in average gift per donor- Total of $100,000 • +20% growth in gifts from top tier donors – Total of $120,000
Programs and Services Measurement Plan	• Quarterly donation reports • Monthly top tier supporter reviews • Monthly reporting dashboards for loyalty metrics, donation lift, and campaign engagement • Quarterly executive reviews to refine budget allocation • ROME evaluation on each tactic with optimization based on real-time data

Programs and Services Tactic
Create “Fund-a-Program” or “Adopt-a-Project” initiatives that link donor contributions directly to visible program elements they can “own.” • Create program sponsorship tiers (“Fund a Classroom,” “Adopt a Family,” “Sponsor a Youth Leader”) • Offer naming opportunities within specific programs (e.g., “Jane Doe Scholarship Fund” or “Smith Family Mentorship Program”) • Bundle giving levels with program visibility benefits — inclusion in newsletters, reports, or signage • Develop impact kits showing exactly what each funding level accomplishes (“$250 = 1 month of art supplies for 10 children”) • Report back quarterly to sponsors with photos, participant stories, and metrics

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	**Q1–Q2**	$40,000

Programs and Services Tactic
Develop program naming and legacy opportunities through encouraging major and long-term giving and by aligning donations with identity and legacy. • Offer program naming rights for large donations or endowments. • Establish legacy programs where donors can sponsor entire program areas or create endowed positions. • Launch a "Leave Your Legacy" initiative with planned giving options tied to sustaining signature programs. • Develop honor/memorial giving opportunities ("Support this program in honor of someone who inspired you").

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	**Q1–Q3**	$45,000

TOTAL BUDGET	**$85,000**
ROME*	**159%**

*** Return on Mission Engagement (ROME) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100**

Example: Objective, Strategy, and Tactics Execution for Contribution Levels

Contribution Levels Objective	Increase average donor contribution levels and overall giving volume.
Contribution Levels Strategy	Adopt donor-centered contribution programs that improve donation flexibility, convenience, and perceived value to supporters to encourage higher and more frequent giving.
Target Audience	• Primary: Current donors (renewals and lapsed supporters, describe demographics TBD) • Secondary: Prospective donors acquired through events, social media, or peer referrals (describe demographics TBD)
Contribution Levels Key Performance Indicators (KPIs)	• 15% increase in average donation per donor - $50,000 total • 20% increase in mid- to high-tier donors - $60,000 total
Contribution Levels Measurement Plan	• Monthly donor dashboard • Supporter feedback • Monthly reporting dashboards for loyalty metrics, donation lift, and campaign engagement • Quarterly executive reviews to refine budget allocation • ROME evaluation on each tactic with optimization based on real-time data

Donor and Public Awareness Tactic

Encourage donors to give at higher levels by creating clear, value-driven options.

- Introduce tiered giving levels (e.g., “Friend – $25/month,” “Advocate – $50/month,” “Champion – $100/month”) with specific impact descriptions (“$50/month provides tutoring for one child”).
- Create branded giving societies or circles that recognize milestone giving levels (e.g., *The Visionary Circle, Founders Guild*).
- Bundle donation opportunities with recognition incentives (e.g., exclusive updates, name in annual report, early event access).
- Promote upgrade campaigns encouraging existing donors to move up one level (“Increase your monthly gift by just $10 to reach the next tier!”).
- Present impact equivalencies — translating dollars into tangible outcomes (e.g., “$250 funds medical supplies for 10 patients”).

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	**Q1–Q2**	$20,000

Donor and Public Awareness Tactic
Simplify and modernize the giving process to increase the amount and frequency of donations. • Accept all major payment methods: credit/debit cards, PayPal, Venmo, ACH/bank transfers, Apple Pay, Google Pay • Integrate digital wallets and QR code payment options for on-the-go or event donations • Add embedded donation forms on your website and social media (Facebook or Instagram giving tools) • Use text-to-give or SMS donation codes at events (Text GIVE to 41444") • Enable donation kiosks or tablets at physical locations • Optimize donation forms for mobile responsiveness and one-click checkout • Implement donor data encryption and security certifications to ensure safe online transactions

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	**Q1–Q3**	$20,000

TOTAL BUDGET	**$30,000**
ROME*	**267%**

*** Return on Mission Engagement (ROME) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100**

Example: Objective, Strategy, and Tactics Execution for Program Delivery Channels

Program Delivery Channels Objective	Increase contribution levels by enhancing and expanding mission visibility and improving donor engagement.
Program Delivery Channels Strategy	Develop multiple program delivery channels that will improve reach to new donors, frequency of touch points, and exposure to inspire higher and more frequent donations.
Target Audience	• New donors (describe demographics TBD)
Program Delivery Channels Key Performance Indicators (KPIs)	• +10% new donors from target regions – 3,000 new donors • +15% increase in contribution volume – Total of $120,000
Program Delivery Channels Measurement Plan	• Total donations by new region and channel • Monthly reporting dashboards for loyalty metrics, donation lift, and campaign engagement • Quarterly executive reviews to refine budget allocation • ROME evaluation on each tactic with optimization based on real-time data

Program Delivery Channels Tactic

Implement regional or community-based program hubs to expand reach to attract local donors and foster community ownership.

- Establish regional satellite programs that highlight local impact and funding opportunities.
- Create community-hosted delivery sites (e.g., in libraries, schools, community centers) with visible signage: "This program is made possible by donors like you."
- Conduct regional giving drives tied to program growth ("Help us expand into the next county!").
- Recruit local donor ambassadors to fund and promote regional program delivery.
- Share hyper-local success stories to attract geographically connected giving.

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	**Q1–Q2**	$25,000

Program Delivery Channels Tactic

Develop partnership-driven program channels by using cross-organizational collaborations to enhance credibility, reach, and donor appeal.

- Partner with schools, hospitals, or businesses to co-host program delivery
- Use co-branded delivery models where donors see collaborative impact ("Your gift helps us and our partners reach 500 families this quarter")

- Offer sponsorship packages for corporate partners funding program expansions
- Provide joint donor recognition with partners (e.g., plaques, joint media releases, shared thank-you events)
- Use partner networks to amplify donation appeals through newsletters and events

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	**Q1–Q3**	$18,000

TOTAL BUDGET	**$43,000**
ROME*	**179%**

*** Return on Mission Engagement (ROME) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100**

Create Your Objectives, Strategies, and Tactics To Address Donor and Public Awareness

Donor and Public Awareness *(How you communicate and persuade)*
Involves all the tactics used to raise awareness and generate demand.

- Strengthen emotional connections through social media that could include weekly storytelling videos.
- Improve earned media exposure through press releases announcing new programs.
- Deepen donor understanding though content marketing demonstrated by an impact blog series.
- Retain donors by using email with personalized updates.
- Build visibility and raise funds by implementing events such as an annual gala with silent auction, community walk.
- Broaden reach with partnerships, create business sponsorships.
- Increase awareness by promoting advocacy, initiate educational webinars.

Question 19. Donor and Public Awareness Objective

Question 20. Donor and Public Awareness Strategy and Target Audience

Question 21. Donor and Public Awareness KPIs

Question 22. Donor and Public Awareness Measurement Plan

Question 23. Donor and Public Awareness Tactics with Responsibilities, Timing and Budgets

Question 24. Total Budget, All Donor and Public Awareness Tactics

Question 25. ROME All Donor and Public Awareness Tactics: [Return on Mission Engagement(ROME) for Donor and Public Awareness) = Gain – Budget / Budget X 100]

Create Your Objectives, Strategies, and Tactics To Address Programs and Services

Programs and Services ***(What you offer to the market)***
Focuses on the value delivered through what you sell.

- Improve satisfaction through better program quality, implement a client feedback system.
- Strengthen delivery by capacity building, implement staff/volunteer training.
- Demonstrate results from data and reporting, publish quarterly impact dashboard.
- Sustain impact from more engagement, Create an alumni and peer mentorship system.

Question 26. Programs and Services Objective

Question 27. Programs and Services Strategy and Target Audience

Question 28. Programs and Services KPIs

Question 29. Programs and Services Measurement Plan

Question 30. Programs and Services Tactics with Responsibilities, Timing and Budgets

Question 31. Total Budget, All Programs and Services Tactics

Question 32. ROME for All Programs and Services Tactics: [Return on Mission Engagement (ROME) for Programs and Services) = Gain – Budget / Budget X 100]

Create Your Objectives, Strategies, and Tactics To Address Contribution Levels

Contribution Levels *(What the supporter donates)*

- Encourage higher giving with a contribution strategy such as creating tiered giving levels with impact stories.
- Increase retention through recurring giving, consider launching a "sustainers circle."
- Simplify donations with payment options, such as PayPal, Venmo, Apple Pay, direct withdrawal, payroll deduction.
- Multiply donor impact with matching gifts such as employer matching partnerships.
- Diversify giving types by offering alternative giving such as stock, used vehicles / boats / RVs, other valuable property, crypto gifts.
- Build trust and loyalty through enhanced and personalized communications with donors including donor reports.

Question 33. Contribution Levels Objective

Question 34. Contribution Levels Strategy and Target Audience

Question 35. Contribution Levels KPIs

Question 36. Contribution Levels Measurement Plan

Question 37. Contribution Levels Tactics with Responsibilities, Timing and Budgets

Question 38. Total Budget, All Contribution Levels Tactics

Question 39. ROME for All Contribution Levels Tactics: [Return on Mission Engagement (ROME) for Contribution Levels) = Gain – Budget / Budget X 100]

Create Your Objectives, Strategies, and Tactics To Address Program Delivery Channels

Program Delivery Channels *(Where and how the programs and services are delivered)*
Defines how and where supporters access your product.

- Extend Reach by developing partnerships, MOUs (Memorandums of Understanding) with 3–5 new community orgs.
- Increase accessibility through better online Access, launch virtual classes and 24/7 resource portal.
- Broaden geographic footprint by regional Expansion, pilot pop-up sites in 3 new communities.
- Drive enrollment through increased awareness, run geo-targeted campaigns.
- Measure reach and impact through data and evaluation, implement tracking dashboards.

Question 40. Program Delivery Channels Objective

Question 41. Program Delivery Channels Strategy and Target Audience

Question 42. Program Delivery Channels KPIs

Question 43. Program Delivery Channels Measurement Plan

Question 44. Program Delivery Channels with Responsibilities, Timing and Budgets

Question 45. Total Budget, All Program Delivery Channels Tactics

Question 46. ROME for Program Delivery Tactics: [Return on Mission Engagement (ROME) for Program Delivery Channels) = Gain – Budget / Budget X 100]

Section III.
Develop a Marketing Budget Summary and ROME

Instructions for Marketing Budget Summary

Summarize the budgets to complete each marketing objective.

Be sure to include the KPIs for each objective and the ROME (Return on Marketing Investment).

ROME formula

ROME = (Gain from Marketing – Marketing Investment) / (Marketing Investment)
X 100

Example:
If you spent $50,000 on a campaign and generated $200,000 in incremental revenue:

ROME = (200,000−50,000 / 50,000) X 100 = 300%

This means you earned $3 in revenue for every $1 spent on marketing.

Question 47. Summarize for Each Objective: KPIs, Budget, and ROME%

Objectives	KPI	Total Budget	ROME %

TOTAL			

Section IV.
Executive Summary

Executive Summary Background

An executive summary is important in a marketing plan because it provides a concise, high-level overview of the plan's most critical elements: objectives, strategies, tactics, target market, and expected results (KPIs).

It helps executives and stakeholders quickly understand the plan's purpose, priorities, and impact without reading the full document.

In short, it answers:

- What are we doing, why, for whom, and what results do we expect?
- This makes it a vital tool for gaining alignment, approval, and support?

Question 48. Summary of Key Takeaways

- Recap the main objectives of the marketing plan
- Reiterate the marketing strategy and how it aligns with the organization's goals
- Highlight core target supporters, positioning, and key tactics

Question 49. Strategic Focus Areas

- Briefly outline the primary strategic priorities (e.g., brand awareness, supporter acquisition, program launch, volunteer retention).
- Emphasize how these focus areas will drive growth or improvement.

Question 50. Expected Outcomes

- Summarize anticipated results from the plan (e.g., donation growth, number of new donor leads, increase in volunteers).

- Reference any success metrics or KPIs introduced earlier in the plan.

Question 51. Budget Summary and ROME

- Recap the budgets by objective and the expected ROME for each objective.

Question 52. Plan for Execution and Review

- Mention who is responsible for implementing the plan.
- Identify timelines, checkpoints, or review processes to track progress.
- Include how adjustments will be made if goals are not met.

Question 53. Closing Statement or Call to Action

- End with a motivating statement that reinforces the company's commitment to execution.
- If the plan is being presented for approval, include a statement requesting feedback, endorsement, or resources needed.

Example of Closing Statement: *"With a clear strategy, defined goals, and a focused execution plan, this marketing roadmap positions us to drive measurable growth, strengthen our brand, and build lasting supporter and volunteer relationships. With support across teams and a commitment to agility, we're ready to turn this plan into results."*

BUILD YOUR MARKETING PLAN WITH EASY-TO-USE AI POWERED ONLINE FORMS AND INSTRUCTIONS

This resource provides a structured framework, promotes goal setting, encourages strategic thinking through SWOT analysis, and offers practical, fillable online templates, powered by AI, to aid in creating actionable marketing plans within budget.

This guide is more than a worksheet. It's a roadmap that empowers your nonprofit organization to plan smarter, market more effectively, and grow with purpose.

Marketing Convergence Solutions | www.convergencestrategies.com
Info@convergencestrategies.com | Vero Beach, Florida 32967