



1, 2, 3 Marketing Assessment

This assessment will tell you which parts of your 1, 2, 3 Marketing Tree are healthy and which need some serious attention!



#1: Assess and Rate

Using the scale below, rate your organization on each of the criteria. Be honest!

- 1 = Not True
- 2 = Somewhat True
- 3 = Very True

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1. You can clearly define what will be different for your organization if your marketing is successful.
2. You know how your best supporters first heard about you.
3. You regularly measure the effectiveness of your marketing.
4. You know who wants to invest their dollars/time in what your organization offers.
5. You can describe your ideal supporter.
6. You have identified your competition.
7. You know what is truly unique about your organization.
8. You have a strong graphic identity (e.g. logo, color scheme, etc.) and use it consistently.
9. You know what motivates your best supporters to work with you.
10. You have a snappy, easy-to-say response to the question, "What does your organization do?"
11. You know the difference between the features and benefits of what your organization offers.
12. You can articulate why someone should choose you over the competition.
13. You have identified your core message and use it consistently.
14. You know the basic demographics of your past and current supporters (e.g. age, interests, gender
15. You have a website that motivates your supporters to work with you.

#2: Score

Once you've filled in the leaves below, add the totals together for your Grand Total.

	WHO	HOW
WHAT	2.	3
1	4.	8
6	5.	10
7	9.	13
11	14.	15
12	TOTAL:	TOTAL:
TOTAL:		
		GRAND TOTAL:

#3: Learn

If your Grand Total is:

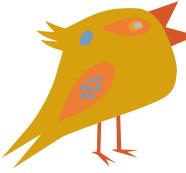
- O 24: Your current marketing efforts are probably not helping you achieve your goals.
 The good news is there's nowhere to go but up!
- 25 39: You've spent time and energy on marketing your mission, but it still needs some refining if you're going to achieve your goals.
- 40 45: Congratulations! You've mastered the basics of good marketing. Now, with a little bit of fine tuning, you'll be on your way to marketing success!

If WHAT is < 10: Don't even think about moving on to WHO or HOW. First you've got to figure out what successful marketing looks like for your organization. If you don't know this, all of your marketing efforts will fall short.

If WHO is < 10: Without knowing WHO the heck wants what you offer and why, you can't do effective marketing. You'll end up tweeting to 70 year old women, for Pete's sake!

If HOW is < 10: That's okay. It simply means you need to realign your HOW with your WHAT and your WHO. The HOW is easy to adjust as you go, so spend time on your WHAT and your WHO and you'll get great results.

Flip up the page and do your 1,2,3 Marketing Tree!



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Narketing Tree or more tools and resources to help you market your visit our DIY page at rw.claxonmarketing.com/diy 3c. Now imagine you get a call from your *ideal* supporter. Tell them why they should work with you. **Mechanisms** 3d. List the top three ways (e.g. flyers, website, Facebook, etc.) you will reach your *ideal* supporters over the next year. Assign who will be in charge of making each one happen and by when. Measurement 3a. If your marketing is successful, in one year you will be known as the organization that... 3b. Imagine you are at a cocktail party. What would you say if someone asked: "What do you do?" the success of each marketing mechanism? HOW 2a. Name some common characteristics of 2d. Based on what you know of your best supporters, describe your *ideal* one. 2b. Why do your best supporters say they like working with you? 2c. How do your best supporters find out about you? **WHO** 1e. What will be different for your organization one year from now if your marketing is successful? $1a. \ What \ does \ your \ organization \ offer?$ First, define WHAT marketing success looks like for your **WHAT** claxon www.claxonmarketing.com | 206.351.8504 23 Marketing Tree

or more tools and resources to help you market your mission with confidence. visit our DIY page at ww.claxonmarketing.com/div

3c. Now imagine you get a call from your *ideal*

We're the only organization in Seattle that has trained volunteers who can make sure that low-income, seniors living with depression have the best care possible. We would love to have you come visit a client so you can see first-hand how we improve the lives of those we serve

website, Facebook, etc.) you will reach your **ideal** supporters over the next year Assign who will be in charge of making each one happen and by when.

Mechanisms

Measurement

1. Fliers, as word of mouth has been our leading source of new donors/ Sue and Pat/Print by Feb 15

2. Seminars so that people can see first-hand how we approach this issue/Sue to create calendar of

events by Feb 15th.

3. Local NPR station as our best

donors listen/Pat to investigate

options and costs by March 1st.

3e. How will you measure

Monthly, we will review the fundraising revenue we have generated and track the number of clients served.

provides the best care possible for low-income elderly, individuals who

have been diagnosed

with depression.

3a. If your marketing is successful,

in one year you will be known as the organization that...

We help low-income seniors who have been diagnosed with depression to live happy, healthy lives in the comfort of their own homes.

3b. Imagine you are at a cocktail party. What would you say if someone asked: "What do you do?"

2a. Name some common characteristics of your best supporters – past and present.

2b. Why do your best supporters say they like working with you?

2c. How do your best supporters find out about you?

2d. Based on what you know

Women, married with children, practicing doctors or nurses, age 45 - 60.

They say they see our work as providing continuity of care for their own patients. They know if we don't reach out to them, they won't receive the help of trained professionals and that this is critical to their well-being.

Next, identify WHO for your marketing

WHO

Finally, figure out HOW to most effectively reach

HOW

Referrals from their colleagues or friends at work. of your best supporters, describe your **ideal** one.

Middle aged, female, nurse or doctor, with discretionary income who understands the benefits of regular visits for elderly seniors diagnosed with depression in lowincome communities.

1b. What do you do best?

1c. Who is your competition?

1d. What differentiates you from your competition?

Bring joy to elderly people who are suffering from depression.

Other organizations that provide in-home visits for low-income, elderly people who need support, e.g. "Downtown Care Alliance". (Our current donors also give money to them.)

All of our "in-home visitors" are volunteer professional nurses who have been trained in treating depression. No other organization in town can say that.

1a. What does your organization offer?

1e. What will be different for your organization one year from now if your marketing is successful?

Daily in-home visits for low-income, elderly people in Seattle who have been diagnosed with depression.

First, define WHAT marketing success looks like for your We will have increased our funding by \$50,000 to achieve an ongoing annual budget of \$500,000. This is the amount needed to maintain our current levels of care plus serve 25 new clients each year.

WHAT

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Helpful Hands Nonprofit