

Project Marketing Plan Guide

Rural Health Network Development Grantees

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NATIONAL RURAL HEALTH RESOURCE CENTER

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BACKGROUND AND PURPOSE

Rural Health Innovations (RHI), LLC, is a subsidiary of the National Rural Health Resource Center (The Center), a non-profit organization. Together, RHI and The Center are a leading technical assistance and knowledge center in rural health. In partnership with The Center, RHI enhances the health of rural communities by providing products and services with a focus on excellence and innovation. RHI is providing technical assistance (TA) to the Rural Health Network Development grantees through a contract with the Federal Office of Rural Health Policy (FORHP).

Sustainability of grant funded programs is a goal of FORHP funding. Having a Marketing Plan in place is critical to developing success and sustainability of the project. A Marketing Plan will help a network understand who the potential target markets are. The planning process will help identify how to best convey messages for products and services to meet those market needs. In order to understand the effectiveness of the plan there is an evaluation element.

This *Project Marketing Plan Guide* is designed to support the associated *Marketing Plan Template* and provide guidance to Network Development grantees to create a project marketing plan. This Guide is designed as part of a toolkit that also includes a template and sample documents. This toolkit is supported with an educational webinar: *Project Marketing Planning Toolkit*. The webinar will be recorded and posted on the Network Development Program [webpage](#), the Aim for Sustainability network resource webpage and as a resource in The Center's [Resource Library](#).

Content for this [Project Marketing Plan Guide](#) and the accompanying *Marketing Plan Template* is based on RHI's June 2018 Principles of Marketing Webinar, developed by Dr. Stephen Castleberry, and Value Proposition Designer, December 2016. See the [Resources section](#) in this guide for links to other support materials.

GLOSSARY

Gains: Outcomes customers want to achieve or the concrete benefits they are seeking.³

Goals: Future conditions or performance levels an organization or project intends or desires to attain.¹

Key Message: A description of the benefits customers can expect from your products and services.³

Market: People or organizations with needs or wants and the ability and willingness to buy.²

Market Analysis: A process that provides an understanding of the current and potential environment in which the product or service will be marketed.²

Market Segment: A subgroup of people or organizations sharing one or more characteristics that cause them to have similar product or service needs.²

Marketing Mix: A unique blend of product, place, promotion and pricing strategies designed to produce mutually satisfying exchanges with a target market.²

Marketing: Discover and meet the needs of the network partners to the mutual, continuous benefit of all parties.⁴

Mission: Organization's overall function.¹

Pains: Bad outcomes, risks and obstacles related to customer jobs.³

Target Market: A group of people or organizations for which an organization designs, implements and maintains a marketing mix intended to meet the need of that group.²

Value Proposition: Describes the benefits customers can expect from your products and services.³

Vision: Organization's desired future state.¹

¹ Baldrige Performance Excellence Framework (National Institute of Standards and Technology, Baldrige Performance Excellence: <http://www.nist.gov/baldrige>)

² Lamb, C., Hair, J., & McDaniel, C. (2018). *Marketing 11: Principles of Marketing*. Boston: Cengage Learning.

³ Osterwalder, A., Pigneur, Y., Bernarda, G., & Smith, A. (2014). *Value Proposition Design*. Hoboken, NJ: Wiley & Sons.

⁴ Castleberry, S. (2018). *Marketing Theory: Preparation for Marketing Planning [Webinar]*.

GETTING STARTED

What is a Marketing Plan?

The overall purpose of the marketing plan is for networks to identify the needs of their various target markets, ensure that network products and services meet those needs, develop key messages for communication and measure effectiveness of marketing efforts. Engaging in marketing planning is critical in order to thoroughly understand members' needs and communicate with stakeholders in effective and meaningful ways.

Plans to have in hand as you develop your marketing plan include your project's and network's financial, strategic, evaluation and work plan.

All of these plans are closely linked. Your marketing plan will incorporate information from all of these plans, particularly your strategic and evaluation plans. Later in the grant period, you will create a business plan, which continues to build on previous plans. The information gained, and decisions made throughout all of these activities sets a firm foundation for network sustainability.

This document is meant for internal use for you as network leaders. As an internal document, keeping narratives short with only the necessary facts will make it more useful.

What is the Process?

You'll develop your marketing plan in three major phases. In the first phase, you'll gather the plans you've already developed for your project including your work plan, strategic plan and evaluation plan. You will need to refer to the information in these plans as you build your marketing plan. If you have already created a financial plan for your project, retrieve that plan as well. If you have not yet created a financial plan, don't worry – this is an optional part of the Marketing Plan.

Phase 2 involves convening a group of stakeholders, possibly the same group who worked to develop the project's Strategic Plan. With this group, you'll conduct significant preparatory work to lay the foundation upon which your Marketing Plan will be built.

In Phase 3, you'll build the marketing plan itself. This can be done by a small group of network staff, based off the prep-work done by the large group.

	Phase 1: Gather Existing Plans	Phase 2: Conduct Preparatory Work	Phase 3: Create Marketing Plan
Who?	Network staff	Large group of network stakeholders	Network staff
Why?	Understand yourself	Understand your members	Put it all together
What?	Gather existing project plans	<ol style="list-style-type: none"> 1. Review environmental analysis 2. Identify and define competitors 3. Walk through Product and Service Designer <ul style="list-style-type: none"> • Define member needs • Identify member pains and gains • Brainstorm pain relievers and gain creators • Connect existing and new products and services with pain relievers and gain creators • Develop key messages 	Create marketing plan <ul style="list-style-type: none"> • Incorporate information from preparatory work • Plan evaluation • Identify next steps
How?	Work plan Strategic plan Evaluation plan Financial plan (if one exists)	Appendix A: Environmental Analysis Review Appendix B: Competitor Identification Appendix C: Product and Service Designer	Marketing Plan Template

Note that Phase 2 involves spending several hours gathering input from your stakeholders. If scheduling meetings can be a challenge for your group, you'll want to get started several months before the Marketing Plan is due.

The remainder of this guide outlines Phases 2 and 3 in detail.

How do we Prepare to Create a Marketing Plan (Phase 2)?

Before creating a marketing plan, it's important to take time to engage in market analysis with your stakeholders. Market analysis involves gaining a thorough understanding of your network's environment, as well as your competitors and market segments. While this preparatory work can take some time (we recommend scheduling four to five hours for an in-depth, structured discussion with your stakeholders), this work can prevent misspent time and money later in the project. Facilitation guides to help you lead these critical discussions are included in Appendices A, B and C.

Environment – You already have experience studying the environment in which your network operates. In preparation for drafting your strategic plan, you took time to review the network's internal and external environment, either by identifying blocks and levers, or by conducting a SWOT (strengths, weaknesses, opportunities and threats) analysis. As part of the market analysis, your network needs to revisit the environmental scan from your strategic plan.

Staying at a strategic level, review your environmental scan with your stakeholder group and compare it with the current environment. Update your environmental scan to account for any environmental changes that have arisen since your last scan. For example, you might identify changes in health care and other social determinants of health that are newly influencing your network and members. Appendix A contains a facilitation guide to help you lead this discussion.

If you have not completed an Environmental Analysis, see the [Strategic Planning Guide](#) for assistance with your initial analysis.

Competitors - As you update your environmental scan, pay particular attention to competitors. While the concept of competition is new thinking for some networks, it's important to be aware that competitors are part of all organizations' environments.

If your network was created to fill a gap in services, it might be tempting to conclude that the network has no competitors. This can be a risky assumption. Competitors can come in many forms, and could be not only another network, but any other individual, group or technology that might

provide the services offered by the network. Any entity that might meet member needs, whether in the same way that the network meets them or in other ways, can be considered a competitor.

Appendix B contains a facilitation and worksheet listing specific competitor-related questions for you and your stakeholder group to consider as part of your environmental scan review.

Note that you'll be asked to include information about competitors in your business plan during the last year in the grant period.

Member Needs

A successful marketing plan is dependent upon a clear, accurate understanding of member needs. During your preparatory work in Phase 2, you'll work with your stakeholders to identify the jobs, or tasks, that your members are trying to accomplish, the things that get in the way of them doing this work (pains) and the things that would help them do their work (gains).

The next step in understanding market segments is to determine what the network can do for them to address the pains and gains. This is how your network develops product and services to offer to a given market segment.

Appendix C contains a Product and Service Designer tool, providing all of the things to consider throughout this process, along with a facilitation guide to help you lead this process with your stakeholders.

Note: This part of the pre-work will take up to four hours.

Market Segmentation

A market includes all organizations who have needs and who also have the ability and willingness to “buy” into your program or idea. Market segments are simply subgroups of that market with unique needs in common.

In some environments, it can be difficult to clearly delineate market segments. For many rural health networks, however, market segments can easily be defined by member type. For example, if your network connects patients with chronic conditions with support services and other resources, you might consider your market to be all local health care providers and community-based organizations. You might divide this market into segments

like hospitals, clinics, public health organizations and advocacy groups. Each of these segments may have unique perspectives that need to be addressed in different ways by the network.

In the market segmentation process, you'll work with your stakeholders to identify these subgroups and define their specific needs. In Phase 3, you'll choose one market segment for which you'll develop a marketing plan.

The Product and Service Designer tool in Appendix C includes a facilitation to help you lead your stakeholders through this discussion. The market segmentation discussion is found on the second page of the facilitation.

MARKETING PLAN COMPONENTS

Your marketing plan is made up of the following components:

Network and Project Overview: High-level overview of the network's project documenting the mission, vision, and project goals

Target Market: Detailed description of the group of people or organizations for which the network will design, implement and maintain a marketing plan intended to meet the need of that group

Marketing Plan Goals: The future conditions, or performance levels, the network intends to attain by carrying out the marketing plan.

Marketing Mix: The combination of factors that the network uses to influence demand for its products or services

- Products and Services: Network offerings
- Promotion: Key messages
- Place: Product or service delivery
- Pricing: Revenue and funding (optional)

Marketing Evaluation Plan: Outline of the ways that the network will assess progress toward marketing goals

Secondary Target Market: Brief description of the market segment second most important to your network

Key Initiatives and Next Steps: Key actions needed to implement the marketing plan

Network and Project Overview

This section sets the context for marketing efforts by providing a high-level overview of the network's project, including the vision, project goals and marketing plan goals.

Vision: Expresses your network's aspirations. It outlines where your network aims to be in the next two to three years, acting as a beacon for your grant goals.

Mission: Your organization's overall function. The mission will describe how the network will achieve its vision in relation to specific objectives and customer needs.

Primary Project Goals: The future conditions, or performance levels, that your network intends attain through the life of the grant.

Using the template: Insert your network's mission, vision and project goals. All of these can be found in your strategic plan.

Target Market

Market Segments

As defined previously, a market includes all organizations who have needs and who also have the ability and willingness to buy into your program or idea. A market segment is a subgroup of people or organizations sharing one or more characteristics that cause them to have similar product or service needs.

Prioritize your market segments in order of importance to the success of your project. *The market segment assigned the highest priority will be considered your primary target market, and it is for this market segment that you will build this marketing plan.* Ultimately, each of your market segments should have its own marketing plan, outlining the ways that the network will meet the needs of that segment.

Using the template: List all of the market segments you identified in your preparation work in order of importance (on page 6 of the Product and Service Designer in Appendix C.)

Primary Target Market Characteristics

The primary target market needs to be clearly defined. Ways of defining the primary target market include:

- Demographics (any relevant details, such as location, # of employees, quantity, location, population served, any additional details as appropriate)
- Characteristics from Product and Service Designer
 - Jobs, tasks trying to complete
 - Pains
 - Gains

Note that although you're only asked to submit a marketing plan for your primary target market, it's important to create a unique marketing plan for each market segment. Use the same process to create these plans.

Additional plans do not need to be submitted to the Electronic Handbook (EHB).

Using the template: Provide a summary of your primary target market's characteristics by returning to your Product and Service Designer Worksheet Appendix C. Identify the jobs or tasks your selected target market does from the list on page 2 of the worksheet. Then, identify the pains and gains associated with the target market from page 3 of the same worksheet.

Marketing Plan Goals

Consider the future conditions, or performance levels, that your network intends to attain by carrying out this marketing plan. These goals should be directly linked to the network's primary project goals, as well as the overall mission and vision.

To determine your Market Plan Goals, a question to ask is "What does your network need to accomplish with the selected target market?" Many of these goals may already be in the network's evaluation or work plan and can range from number of persons reached, to number of providers active, to number of new organizations involved.

Answering the following questions will help your network identify the right set of goals. These questions will help your network draw a correlation from project goals to strategic / evaluation plan objectives to evaluation metrics for the target market.

- Which project goals (listed in your Network Project Overview) relate to your target market?
- Take a look at the Plan to Measure Key Data section of your Evaluation Plan. Find the Project Goal(s) identified. Determine which objectives your target market can influence or contribute to.
- What outcome will the target market help meet? And how will you use marketing to achieve this goal?
- Using this information write your marketing goal.

See examples below.

Plan to Measure Key Data

Strategic Objectives	What		
	Output or Outcome Measure Description	Target	Measure Definition
Project Goal 1: Support sustainability of CHW programming and workforce throughout the state.			
Support a statewide association of CHWs.	Expanded membership to a larger geographical area of rural counties.	Increase membership by 20% annually.	Number of members

Marketing Plan Goal: Increase the state CHW Association membership by 20% of the baseline annually by reaching out to providers, facilities, organizations, agencies and other partners and stakeholders.

Plan to Measure Key Data

Strategic Objectives	What		
	Output or Outcome Measure Description	Target	Measure Definition
Project Goal 1: Develop sustainability of enhanced services of the network.			
Increased awareness of PCMH	Number of visits	15% increase by end of year 3	# of pediatric visits

Marketing Plan Goal: Increase the number of new patients by 15% of baseline through increasing providers' awareness of PCMH.

The marketing plan template includes a marketing evaluation plan (page 12), where you'll be asked to specify how you'll measure progress on these goals. You'll continue to revisit these goals as the grant period progresses to make financial projections, prioritize communication strategies and develop a business plan.

Using the template: List your goals for this marketing plan. For each marketing goal, indicate the project goal (from page 5 of the template) associated with it.

Marketing Mix

The marketing mix is a combination of factors that an organization uses to influence demand for its products or services. Part of the work of developing a marketing plan is to conduct a thorough examination of these factors and develop a plan to address each.

In the field of marketing, there are many variations on the concept of the Marketing Mix, each made up of a different number of factors. For the purposes of this grant initiative, we will focus on the fundamental marketing mix framework, known as the Four P's: Products and Services, Promotion, Place and Pricing.

Products and Services: Network Offerings

Products and Services are the offerings that a network provides to satisfy the needs of its members. A product is a tangible item (such as a telemedicine monitor), and a service is an intangible item (such as database maintenance).

As part of your marketing plan preparation work (Phase 2), you will have had a conversation with your stakeholders about products and services. On the marketing plan deliverable, you're asked to include only those products and services that address the needs of your primary target market.

Using the template: List the network's existing and new (if applicable) products and services that are aligned with the needs of the primary target market. Describe how each product or service will benefit your target market by alleviating pains or creating gains. Refer to page 4 of the Product and Service Designer Worksheet in Appendix C.

Promotion: Key Messages

A key message is a statement describing the value that members get by receiving your product or service. A well-crafted key message spells out how the product or service addresses pains and/or gains, *using language that resonates with people in the target market.*

As you craft your messages, consider:

- The experience you want members of your target market to have while they are receiving your product or service (for example, do you want it to be a *personal* experience? *interactive*? *responsive*?). This may help you identify some meaningful **adjectives** to include in your key messages.
- The relationship that members of your target market expect you to establish and maintain with them when they receive or use your products or services (for example, do they expect *self-service*? A sense of *community*? *Shared resources*?). This may help you identify some meaningful **nouns** to include in your messages.

One easy way to build a key message is to combine the wording used in Stage 2 to describe a pain or gain, the job being done by the members of the target market and the product or service provided. As a quick reference go to page 7 of the Product and Service Designer tool. For example: Imagine that one service your network provides is education on sexual violence. If one job of your network members is to educate providers, but they have a lack of resources to do so (a "pain"), your key message might look something like this:

Our curriculum will provide the resources needed to educate clinical providers on the topic of sexual violence.

As you plan promotion, you'll also be asked to identify methods for delivering your key messages. Be sure to consider the method(s) that will best reach your target market, not just those that are most familiar to you.

Using the template: For each existing and new product or service listed on page 5 of Appendix C, create at least one key message that would be meaningful to your primary target market.

Place: Product or Service Delivery

Place defines the methods used to deliver products and services and the timing of the delivery of the product or service. Note that this is about the actual delivery of the product and services themselves, NOT about ways to promote products and services.

Some examples of delivery methods and timing include:

- In-person care coordination
- Asynchronous messaging
- Telehealth consultation
- 24/7 availability

As you create your marketing plan, be sure to consider whether alternative methods could be used to deliver existing products or services.

Place, also, often includes an examination of the network's infrastructure that make product and service delivery possible. For example, if you provide care coordination services, the supporting infrastructure could include staffing dedicated Care Coordinators at each site responsible for the implementation of care coordination services. If you provide telemedicine services, your infrastructure may include dedicated telemedicine rooms.

Place will become even more important as you build your business plan later in the grant period.

Using the template: Briefly describe the internal infrastructure of the network that make it possible to deliver the network's products or services to the target market and the mechanism(s) used to deliver them.

Pricing: Revenue and Funding

This section in the marketing plan is **optional**. Typically, a marketing plan includes a plan for pricing products and services in order to generate sufficient revenue to ensure sustainability. A financial outlook is **not** a required part of your marketing plan. Rather, this will be an expected part of your Business Plan, due closer to the end of the grant period (July 31, 2019). If you have not yet created a financial plan, leave this section blank.

For more information on developing a pricing strategy, go to page 6 of the Network Business Planning Worksheet, located on the Center's website. <https://www.ruralcenter.org/resource-library/business-planning-tools>

Using the template: If you have not yet created a financial plan, leave this section blank. If you already know how you will price your products and services to ensure sustainability, describe your plan here if you wish.

Marketing Evaluation Plan

Just as a project evaluation plan outlines the ways that the network will assess progress toward the project's strategic goals, a marketing evaluation plan outlines the ways that the network will assess progress toward marketing goals.

As you develop your marketing evaluation plan, consider:

- How will you know whether the target market is responding to the unique marketing mix you have created for them?
- What adjustments will you make if you don't get the response you're looking for?

Your marketing goals should be specific, realistic and measurable. Be sure that the chosen measures are *outcome measures*; that is, those which demonstrate an end result. This is different from a *process measure*, which focuses on the steps needed to attain the outcome. For example, if one of your marketing goals is to increase referrals by 20%, a *process measure* might be the number of informational emails sent to primary care providers, while an *outcome measure* might be the number of referrals logged by primary care providers in a Health Information Exchange.

Using the template: Transcribe each of your marketing goals (from page 7 in the template). For each goal, provide the following information:

What: Measurements that provide evidence of achievement, or success, for marketing goals

- Describe the measure (measures can be qualitative or quantitative)
- Provide a specific target or benchmark comparison
- Define how the measure will be calculated
- Identify the method of data collection

When: Identify timing, or frequency, of data collection (i.e. baseline, quarterly, annually, funding cycle etc.)

Who: Identify individual responsible for data collection. This person ensures accuracy and confidentiality.

Secondary Target Market

As noted earlier, it's important to create a unique marketing plan for each market segment. While you're only asked to submit a marketing plan for your primary target market for this deliverable, it can be a helpful exercise to think a bit about the different strategies that would be required if you were marketing to a secondary target market.

Using the template: List your second-priority market segment (from page 6 in the Marketing Plan Template). Consider what separates them or makes them different from your primary target market. Briefly describe how a marketing plan for this market segment might look different than the plan for your primary target market.

Key Initiatives and Next Steps

The very last part of your network's marketing plan is to identify the key actions needed to implement the marketing plan. What are the things that need to happen in the next six to 18 months to bring your marketing plan to life?

Note: A pilot test or limited introduction of products, services, delivery mechanisms or messaging might be part of your next steps. This can provide valuable feedback that can be used to make adjustments before fully launching your plan.

Breaking down the big steps into smaller, more incremental pieces tends to lead to success. Identifying the person responsible for implementation and a completion date ensures accountability.

Using the template: Identify any actions needed to further implement this marketing plan. List the person responsible and a timeline for completion of each action.

RESOURCES

Castleberry, S. (2018). [Marketing Theory: Preparation for Marketing Planning](#) [Webinar].

Lamb, C., Hair, J., & McDaniel, C. (2018). *Marketing 11: Principles of Marketing*. Boston: Cengage Learning.

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