Project Marketing Plan Toolkit

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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 the nation’s leading technical assistance and knowledge centers in rural health. In partnership with The Center, RHI connects rural health organizations with innovations that enhance the health of rural communities.
Why Do Networks Need Marketing?

- Lay the foundation for sustainability
- Understand member needs
- Ensure network services meet member needs
- Spread the message
<table>
<thead>
<tr>
<th>Webinar</th>
<th>Webinar</th>
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<tbody>
<tr>
<td>Principles of Marketing: Preparing for Marketing Planning</td>
<td>Using the Marketing Plan Toolkit</td>
<td>Marketing Plan Due</td>
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<td>June 21</td>
<td>August 16</td>
<td>December 31</td>
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Webinar Objectives

- Explore the major components of a marketing plan
- Learn about approaches for identifying stakeholder needs and aligning products and services to these needs
- Discover ways to craft impactful messages and tailor communication to different audiences
- Prepare to document your marketing plan work using the provided template
Discovering and meeting the needs of the network partners to the mutual, continuous benefit of all parties.

Needs include reducing our network partners’ “pains” and increasing their “gains” as they provide services.
Market segment: A subgroup of the market, sharing one or more characteristics that causes them to have similar needs

Target markets: Those market segments we will pursue with unique offerings

For each target market, we will create a unique marketing plan. Only one plan covering one target market is required for grant purposes.
The Process

Phase 1
Gather Existing Plans

Phase 2
Conduct Prep Work

Phase 3
Marketing Plan 1
Marketing Plan 2
Marketing Plan 3
# The Details

<table>
<thead>
<tr>
<th>Phase 1: Gather Existing Plans</th>
<th>Phase 2: Conduct Preparatory Work</th>
<th>Phase 3: Create Marketing Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who?</strong></td>
<td><strong>Phase 2: Conduct Preparatory Work</strong></td>
<td><strong>Phase 3: Create Marketing Plan</strong></td>
</tr>
<tr>
<td>Network staff</td>
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<td><strong>Why?</strong></td>
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<tr>
<td>Work plan</td>
<td>Appendix A: Environmental Analysis Review</td>
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<tr>
<td>Strategic plan</td>
<td>Appendix B: Competitor Identification</td>
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<td>Evaluation plan</td>
<td>Appendix C: Product and Service Designer</td>
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<td>Financial plan (if one exists)</td>
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**Phase 1: Gather Existing Plans**
- Gather existing project plans

**Phase 2: Conduct Preparatory Work**
1. Review environmental analysis
2. Identify and define competitors
3. Walk through Product and Service Designer
   - 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

**Phase 3: Create Marketing Plan**
- Incorporate information from preparatory work
- Plan evaluation
- Identify next steps

**Appendixes**
- Appendix A: Environmental Analysis Review
- Appendix B: Competitor Identification
- Appendix C: Product and Service Designer
Phase 2

Preparatory Work
Prep Work: Market Analysis

Gain a thorough understanding of your network’s environment

• Review and update environmental scan
• Identify and define competitors
• Define member needs and what the network can do for members
• Identify market segments
# Phase 2 Overview

## Phase 2: Conduct Preparatory Work

### Who?

| Large group of network stakeholders |

### Why?

| Understand your members |

### What?

1. **Review environmental analysis**
2. Identify and define competitors
3. Walk through Product and Service Designer
   - 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

### How?

| Appendix A: Environmental Analysis Review |
| Appendix B: Competitor Identification |
| Appendix C: Product and Service Designer |
Environmental Scan

• Review previous environmental scan
• How has the environment changed since then?
• Which newly identified blocks and levers will impact the network and/or our work plan?
• What levers and blocks are most critical to move our project forward?
# Phase 2 Progress

## Phase 2: Conduct Preparatory Work

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     Appendix B: Competitor Identification  
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Competitors

• Who else can or might provide the services offered by the network?
• What are alternative ways of accomplishing the same objective?
• Why is the network a better choice?
• What is the network’s competitive advantage?
• What is happening with network partners that could be signs of competition?
Last Step in Phase 2

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Product and Service Design

Step 1: Member needs assessment

Step 2: Product and service value map

Step 3: Identify market segments

Step 4: Find the fit
Big Picture of Product and Service Designer: Member Needs

Product & Service Value Map

- **Gain Creators**: What can the network do to create the GAINS?? How you can create outcomes and benefits your members expect?
- **Pain Relievers**: What can the network do to relieve the PAINS? How you can eliminate or reduce the things that annoy your members before, during and after doing their jobs?

Member Needs Assessment

- **Gains**
  - What are the benefits and outcomes your members experience while achieving the goal, “job” or solve the problem?

- **Jobs**
  - What work are we trying to get done? What problems are we trying to solve?

- **Pains**
  - What are the frustrations your members experience while trying to achieve the goal, the job or solve the problem?
Product and Service Design: Member Needs Assessment

- What are the jobs or tasks your members want to complete, problems they’re trying to solve, needs they’re trying to satisfy?
- What pains and gains do members experience?
Big Picture of Product and Service Designer: Product and Service Value Map
Product and Service Design: Product and Service Value Map

• What can the network do to relieve the pains?
• What can the network do to create the gains?
• What products or services does or could the network deliver?
What market segments can the network’s products or services be offered to?

**Market segments:** Subgroups of people or organizations sharing one or more characteristics that cause them to have similar product or service needs.
Big Picture of Product and Service Designer

Product & Service Value Map

Gain Creators
What can the network do to create the GAINS?? How you can create outcomes and benefits your members expect?

Pain Relievers
What can the network do to relieve the PAINS? How you can eliminate or reduce the things that annoy your members before, during and after doing their jobs?

Member Needs Assessment

Gains
What are the benefits and outcomes your members experience while achieving the goal, “job” or solve the problem?

Jobs
What work are we trying to get done? What problems are we trying to solve? What needs are they trying to satisfy?

Pains
What are the frustrations your members experience while trying to achieve the goal, the job or solve the problem?
What are the pain relievers and pains each product or service addresses?
What are the gain creators and gains each product or service addresses?
What is the rating of intensity of each?
Phase 3

Marketing Plan Components
## Phase 3 Overview

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### Phase 3

- Marketing Plan 1
- Marketing Plan 2
- Marketing Plan 3
## Marketing Plan Components

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<td>Network and Project Overview</td>
<td>High-level overview of the network’s project documenting the mission, vision and project goals</td>
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<td>Target Market</td>
<td>Group of people or organizations for which the marketing plan is being designed</td>
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<tr>
<td>Marketing Plan Goals</td>
<td>Future conditions the network intends to attain by carrying out the marketing plan</td>
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<tr>
<td>Marketing Mix</td>
<td>Combination of factors the network uses to influence demand for its products and services</td>
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<tr>
<td>Marketing Evaluation Plan</td>
<td>Outline of the ways that the network will assess progress toward marketing goals</td>
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<td>Secondary Target Market</td>
<td>Brief description of the market segment second most important to your network</td>
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<tr>
<td>Key Initiatives and Next Steps</td>
<td>Key actions needed to further implement the marketing plan</td>
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Network and Project Overview

Vision: Where does your network aim to be in the next two to three years?
Mission: How will the network achieve its vision?
Primary Project Goals: What future conditions will result from the project?

All of these can come directly from your Strategic Plan.
Target Market

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

Primary Target Market: The market segment considered the most important to the success of your project.

This marketing plan will focus on your primary target market.
Marketing Plan Goals

Which of project goals relate to your primary target market?

Marketing goals may already be in your evaluation or work plan.

Plan to Measure Key Data (Evaluation Plan): Choose the objectives that your target market can influence or contribute to.

What outcome will the target market help meet? How will you use marketing to achieve this goal?
Marketing Goal Examples

Example 1
Increase the state CHW Association membership by 20% annually by reaching out to providers, facilities, organizations, agencies and other partners and stakeholders

Example 2
Increase the number of new patients by 15% through increasing providers’ awareness of PCMH
Marketing Mix

Combination of factors that a network uses to influence demand for its products or services.

- Products and Services: Network offerings
- Promotion: Key message
- Place: Product or service delivery
- Pricing: Revenue and funding
What existing and new products and services are aligned with the needs of your primary target market?
How will each of these create gains and/or alleviate pains for your target market?
How will you describe the ways that your products and services address pains and gains, *in ways that resonate with people in the target market*?

Pull from pains and gains, jobs and products/services identified during prep work.

AND: What methods will you use to reach your target market?
Promotion: One Way to Create a Key Message

Product or Service + Pain or Gain + Member Job = Key Message

Education on Sexual Violence + Lack of Resources + Provider Education

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

How will you **deliver** products and services?
Examples:
• In-person care coordination
• Asynchronous messaging
• Telehealth consultation
• 24/7 availability

What about your network’s **infrastructure** makes product and service delivery possible?
Examples:
• Staffing models
• Dedicated telemedicine rooms
• Agreements with transportation providers
Marketing Mix: Pricing

How will you price products and services in ways that generate enough revenue to ensure sustainability?

This section is OPTIONAL.
Marketing Evaluation Plan

• 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?

• Outcome measures that demonstrate an end result
Secondary Target Market

What might you need to do differently if you were creating a plan for a secondary target market?
Key Initiatives and Next Steps

- What are the things that need to happen in the next six to eighteen months to bring your marketing plan to life?

- Consider a pilot test or limited introduction

- List the person responsible and a timeline for completion of each action
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