

# Project Marketing Plan Toolkit



**Debra Laine**

Senior Program Specialist

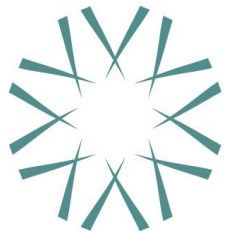


**Shannon Studden**

Program Specialist II

# Rural Health Innovations' 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 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.



NATIONAL  
RURAL HEALTH  
RESOURCE CENTER



# Why Do Networks Need Marketing?



- Lay the foundation for sustainability
- Understand member needs
- Ensure network services meet member needs
- Spread the message

# The Big Picture

## Webinar

Principles of  
Marketing:  
Preparing for  
Marketing  
Planning

June 21

## Webinar

Using the  
Marketing Plan  
Toolkit

August 16

## Deliverable

Marketing Plan  
Due

December 31

# 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

# Review: Marketing Is...

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.

# Segmentation

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

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

## 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

### 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

# 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

## 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?

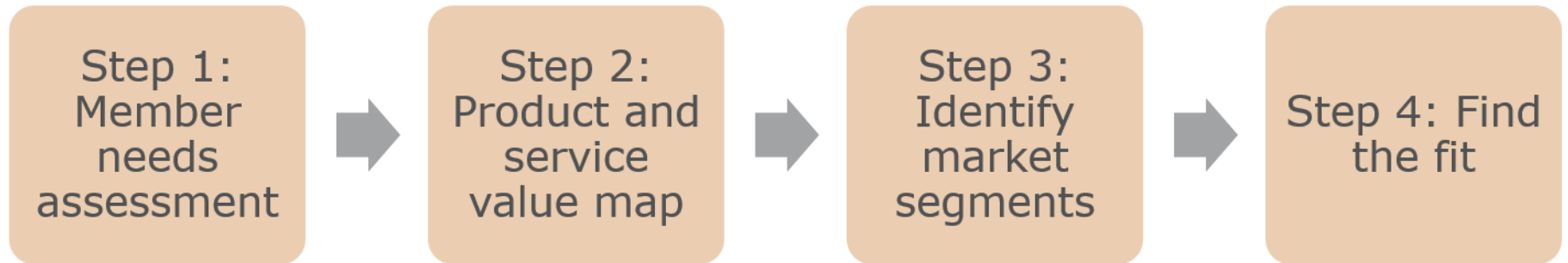
Appendix A: Environmental Analysis Review

Appendix B: Competitor Identification

Appendix C: Product and Service Designer

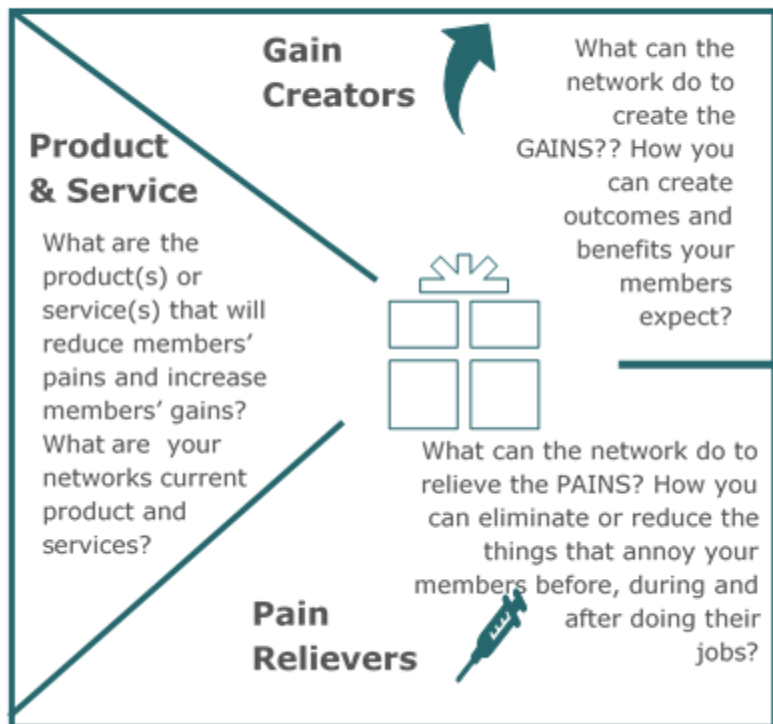


# Product and Service Design



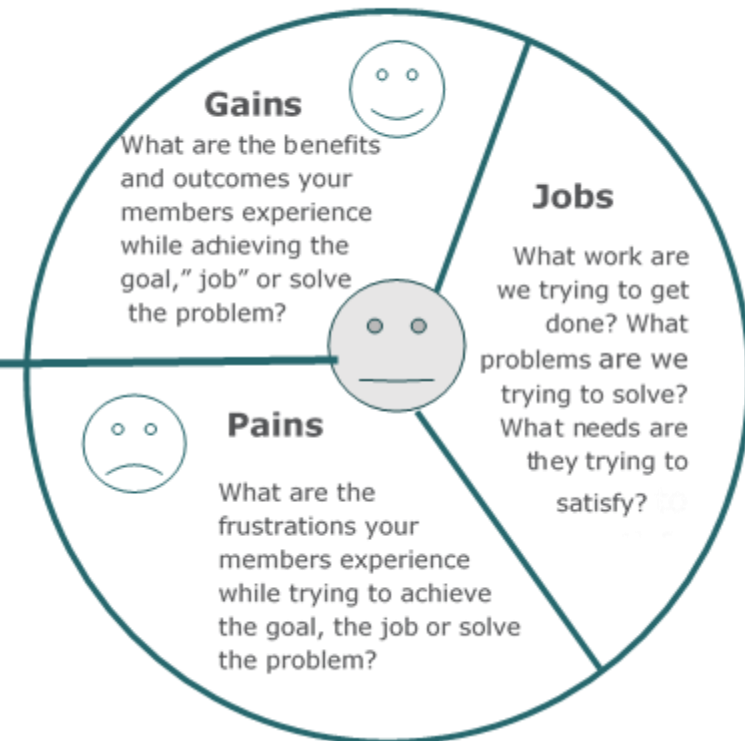
# Big Picture of Product and Service Designer: Member Needs

## Product & Service Value Map



FIT

## Member Needs Assessment

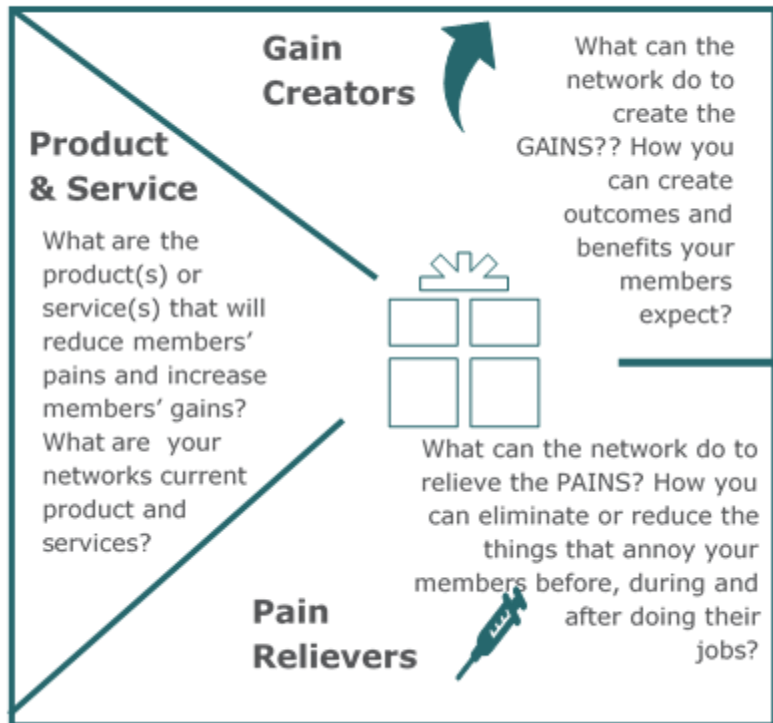


# Product and Service Design: Member Needs Assessment

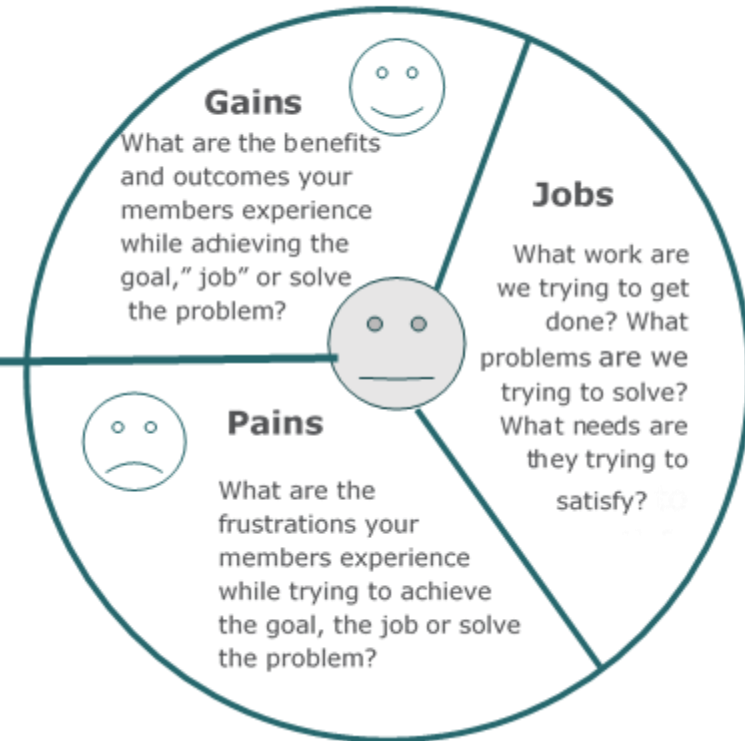
- What are the jobs or tasks your members want to complete, problems they're trying to solve, needs they're trying to satisfy?
- What pains and gains do members experience?

# Big Picture of Product and Service Designer: Product and Service Value Map

## Product & Service Value Map



## Member Needs Assessment



# 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?

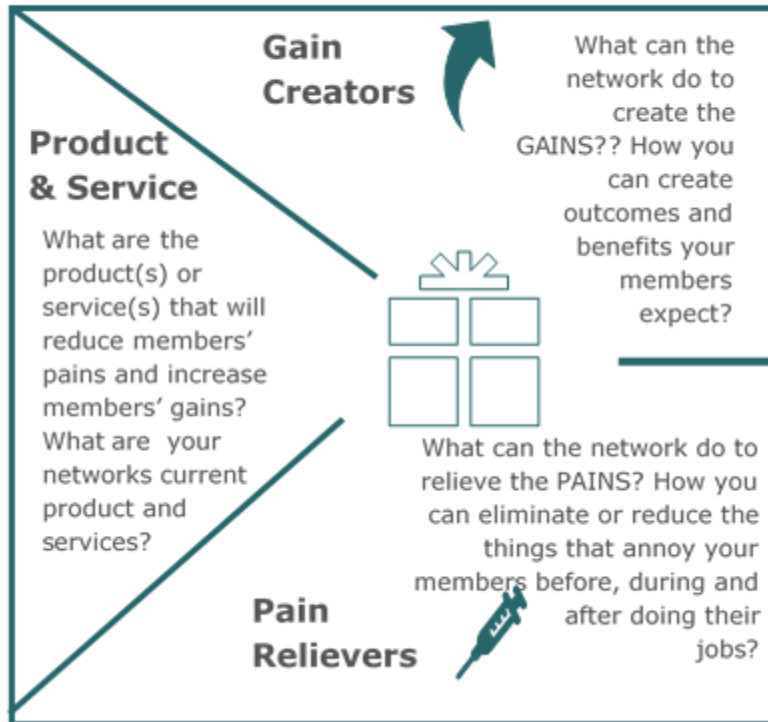
# Product and Service Design: Identify Market Segments

- 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.

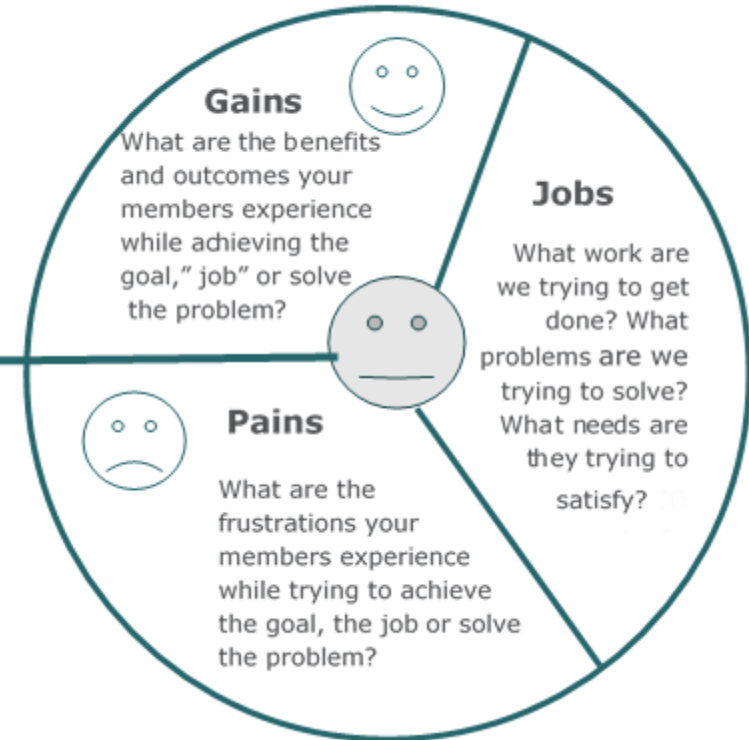
# Big Picture of Product and Service Designer

## Product & Service Value Map



FIT

## Member Needs Assessment



# Product and Service Design: Find the Fit

- 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

## Phase 3: Create Marketing Plan

**Who?**

Network staff

**Why?**

Put it all together

**What?**

Create marketing plan

- Incorporate information from preparatory work
- Plan evaluation
- Identify next steps

**How?**

Marketing Plan Template

Phase 3

Marketing Plan 1

Marketing Plan 2

Marketing Plan 3

# Marketing Plan Components

## **Network and Project Overview**

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

## **Target Market**

Group of people or organizations for which the marketing plan is being designed

## **Marketing Plan Goals**

Future conditions the network intends to attain by carrying out the marketing plan

## **Marketing Mix**

Combination of factors the network uses to influence demand for its products and services

## **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 further implement the marketing plan

# 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



# Marketing Mix: Products and Services

**Pull from products and services identified during prep work.**

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?

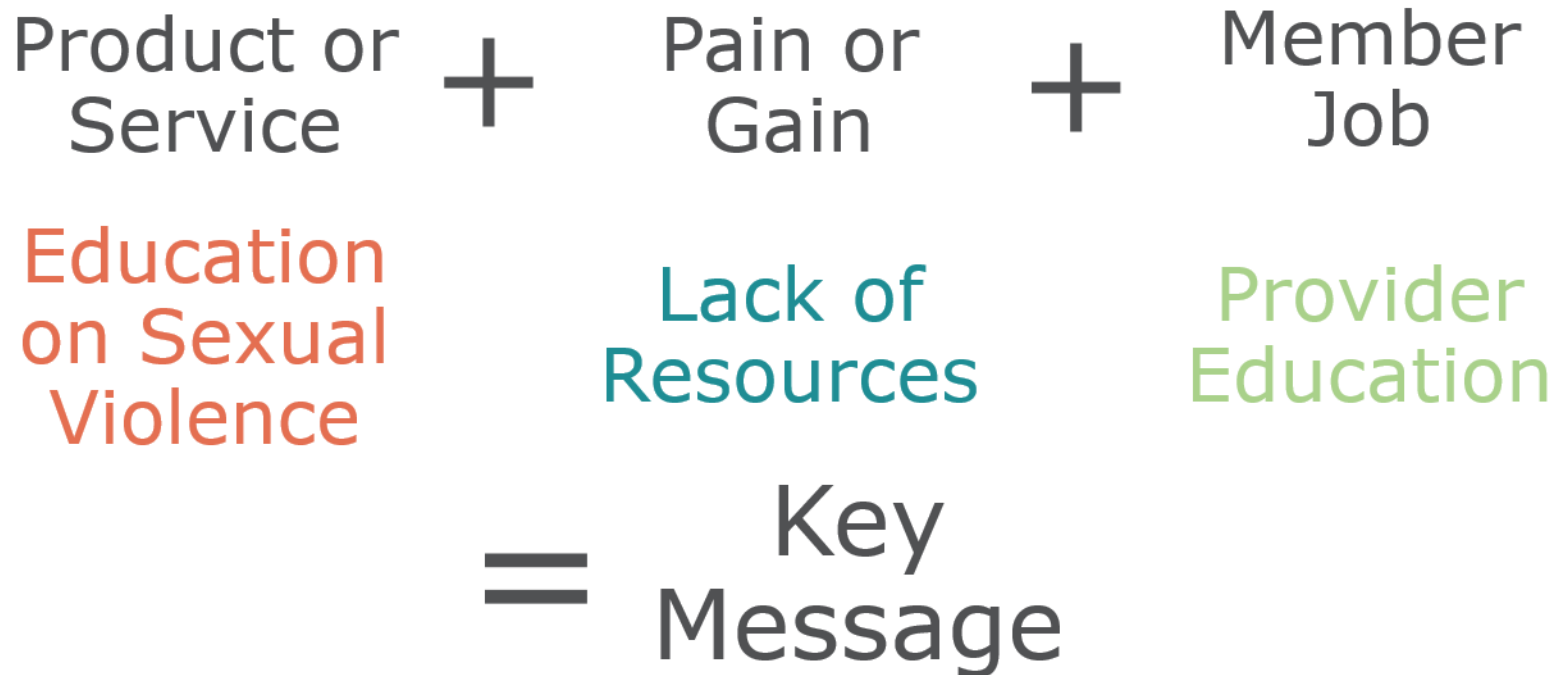
# Marketing Mix: Promotion

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



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 steps 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



# Contact Information

Debra Laine

Sr. Program Specialist

218-216-7042

dlaine@ruralcenter.org

Shannon Studden

Program Specialist II

218-216-7044

sstudden@ruralcenter.org

Get to know us better:

<http://www.ruralcenter.org>

