

CHANNEL PARTNER LEADERSHIP HANDBOOK

MARKETING

© 2011 API CS The Association for Operations Management

APICS The Association for Operations Management

8430 West Bryn Mawr Avenue

Suite 1000

Chicago, IL 60631-3439

Stock #01030 January 2011



CHANNEL PARTNER LEADERSHIP HANDBOOK

MARKETING

APICS Corporate Office: 8430 West Bryn Mawr, Suite 1000, Chicago, IL 60631 USA
Phone 773-867-1778 **Toll Free** 800-444-2742 **Fax** 773-639-3008 **apics.org**

All rights reserved. No part of this publication covered by the copyright herein may be reproduced or copied in any form or by any means – graphic, electronic, or mechanical, including photocopying, taping, or information storage and retrieval systems – without written permission of the publisher.

FOREWORD

Congratulations on assuming the important role of marketing director for your chapter. As the communications leader, you greatly contribute to increasing awareness about APICS, your local chapter, and the operations management profession in your community.

This Marketing Handbook will familiarize you with chapter marketing and the process of developing an effective marketing plan and associated materials. The handbook offers guidelines and resource information to help you develop your own chapter materials. You can view sample marketing plans by visiting cbox.apics.org.

Created with your chapter's strategic goals in mind, this handbook will help you

- Understand how to better target your messages and materials to recruit and retain members effectively
- Increase awareness of chapter activities and events in your community
- Build better relationships with current and prospective members.

We look forward to hearing about your chapter's marketing and communications success.

Overview

The APICS Marketing Handbook provides a framework for a chapter marketing plan and supplies access to templates and samples that chapter leaders can use to develop their own materials. This handbook is divided into two parts: (1) marketing planning and (2) marketing communications. These topics combined provide a full course of marketing tools, processes, and practices. This handbook also includes suggestions and guidelines for the successful operation of a chapter marketing committee.

What Is Marketing?

The American Marketing Association recently defined marketing as an “activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.” Marketing involves a variety of interrelated, ongoing activities that permeate a chapter's operations. Marketing activities range from creating a service or product that meets the member's needs, to promoting that service or product, to ensuring that chapter members are satisfied.

For APICS chapters, marketing should be linked to the chapter's annual and strategic plan and goals. Successful marketing means more than simply developing an effective brochure or writing a press release for your local news media. It involves thoughtful analysis and a deep understanding of the environment in which you operate. An effective marketing effort first defines what the “market” looks like, which enables chapter leaders to better understand how to attract and retain members and successfully meet chapter goals and objectives. Such information is invaluable as a chapter develops or revises its strategic plans and goals.

FOREWORD

The information contained in this handbook offers a number of benefits to your chapter, including direction on how to

- get others on board
- develop a mission statement
- clarify chapter goals and objectives
- create a focused and strategic plan of action
- undertake creative problem solving and brainstorming
- define and understand a target audience
- become more disciplined in execution
- conduct a market analysis or competitive analysis
- improve project planning and implementation
- establish new processes for organizational effectiveness
- develop persuasive communications
- develop effective media strategies
- build community and media relations
- instill a customer-service focus.

The APICS corporate office provides a variety of resources to help your chapter be successful. The Chapter Resources Catalog (Stock #82032) contains an assortment of tools to complement your chapter's membership development, certification marketing, and chapter management objectives. Many resources are free and can be downloaded at cbox.apics.org.

Why Market Your Chapter?

Maintaining a strong, viable chapter is an important accomplishment. A strategic chapter marketing program can be the key to your chapter's long-term sustainability. Regardless if a chapter already markets its programs and services or is just beginning, strategic marketing planning can help make a real difference in meeting the needs of current members and recruiting new ones.

Critical Elements of Successful Marketing

Few organizational efforts are as far-reaching, or have the potential to bring such significant positive results, as marketing activities. Marketing involves both evaluative analysis and creative thought. It requires thorough planning and constant action. Essentially, effective marketing is a combination of long-range, strategic thinking and attention to detail. When following all the right steps, marketing offers vast potential and has few limits as to what it can achieve for your chapter.

PART 1: MARKETING PLANNING

PART 1: MARKETING PLANNING

Prerequisites to Beginning Your Marketing Work

Involving others

A common challenge for all chapters is a limited availability of chapter leaders to perform the tasks necessary to run a chapter. It often seems that time spent doing any one task well comes at the expense of another. Recruitment is a significant and never-ending activity; doing this one task well is not optional for the success of your chapter. Getting appropriate help with marketing activities can be one of the most effective and efficient strategies to managing your chapter successfully. It will free up valuable time for the other tasks you must perform.

Getting help with marketing activities not only can make your life a bit easier, but also can lead to improved outcomes for your marketing efforts.

Focusing on the “customer”

Excellent member service is the hallmark of a successful chapter. This applies not only to current or prospective members but to lapsed members who could potentially see value in rejoining your chapter.

What can your chapter do to evaluate and maximize your customer service efforts? One place to start is by examining prospective members' points of entry into your chapter, because first impressions are often lasting ones. Another good idea is to conduct a survey of your current members. This is an excellent way to learn about their experiences with your chapter. The data can provide important information about how prospective members perceive your chapter and help to identify areas in which you need to make improvements.

Marketing Planning

Although a written marketing plan is essential, the planning process is just as, if not more, important than the final document. The discussions that result in the plan provide an agreed-upon context for planning, executing, and measuring initiatives throughout the planned period. Although the marketing plan should be developed when an organization is initiated, it can be put in place later to recharge the organization's efforts.

Successful planning involves going through evaluative, strategic, and creative processes—in partnership with other chapter stakeholders—step by step.

A formal, written marketing plan supports your chapter in a number of significant ways, including:

- Creating a shared vision for your chapter, its board, and APICS Corporate. It is important for your chapter to be unified in its goals and actions.
- Enabling you to formally solicit the input, ideas, time, and resources of others. This will result in greater commitment, synergy, and visibility for your chapter.
- Enhancing the chances of your ideas being carried out and implemented effectively.
- Providing greater clarity to those responsible for implementing the plan. Timelines create a broader perspective and encourages continuity of efforts.
- Documenting and evaluating your efforts and making continuous improvements. Without a written plan in place, it is difficult to know how to determine if your chapter achieved all it set out to do.

PART 1: MARKETING PLANNING

Developing an effective plan does not need to take months to complete. It is possible to develop a plan in just a few pages. Of course, you can go as in-depth as necessary. If you are new to planning, it will take more effort the first time. Even if you are an experienced planner, your planning process will benefit from reviewing the following suggestions and tools.

Managing the Planning Process

Managing the planning process actually starts before developing the contents of a plan. At this stage, you know you need a marketing plan but haven't formally started the process of developing one. Planning involves getting help and commitment from others and developing a project schedule to manage the planning process.

Planning is one of the areas where it is crucial to solicit the involvement of others. Having input from other members of your chapter committee can help ensure support of the plan, add to the depth of planning ideas, and make planning much more manageable.

A first step is to create a planning committee that may include other chapter board members and chapter members that wish to be involved. This planning team will have the task of overall development and completion of a plan. The team should be active in developing the content and providing input into the overall planning process. You will want to consider the current resources, priorities, and schedules of these key individuals—both for writing and implementing the plan. Additionally, getting “buy in” is critical to the success of your plan. If board members are not committed to the development of a marketing plan, it may not take hold. You may need to convince them of the project's value. Without top commitment and support, your plan's strategies will not be a high priority for the chapter, its funding, and its resources.

It is important to think through the coordination and management of the planning process. Otherwise, developing a marketing plan quickly can become unwieldy and chaotic. During the first team meeting to develop the chapter's planning process, create a marketing project schedule. A schedule identifies key milestones and sets a realistic completion date for the overall plan.

PART 1: MARKETING PLANNING

Below is a sample marketing project schedule with typical milestones for writing a marketing plan:

Marketing Activities for Plan Development	Completion Date*	Person Responsible
Form a team and assign responsibilities.	July 1	
Hold kick-off meeting.	July 8	
Conduct a team meeting to provide updates and progress reports.	July 15	
Complete Environmental Analysis/SWOT Analysis.	July 15	
Clarify goals and objectives.	July 15	
Conduct a team meeting to provide updates and progress reports.	July 22	
Identify target audience(s) and their needs.	July 22	
Discuss chapter vision and mission.	July 22	
Conduct a team meeting to brainstorm and determine marketing strategies.	July 29	
Compile and write draft of written plan.	August 13	
Compile final draft of plan.	August 27	
Plan review and approval by board.	September 15	
Make final edits, finalize plan, and distribute.	September 22	
Solicit team input, write planning process evaluation.	September 30	
Develop the first quarter detailed activity list.	September 30	

*Assumes fiscal year begins on July 1.

Plan Outline

All good marketing starts with developing a plan. Building an effective marketing plan involves the following sections:

- Mission statement
- Plan time frame
- Products and services
- Achievable goals
- Situation analysis
- Financial and time commitment
- Implementing the plan
- Plan evaluation and review.

Planning is about making decisions that will have a positive impact on the future effectiveness of your chapter's members, programs, and services. Establishing the summary as your first step will enable you to evaluate what initiatives support your mission, will lead your chapter to achieving its goals and are possible given the breadth of your marketing capabilities.

PART 1: MARKETING PLANNING

Mission statement

Your marketing plan should begin with the mission statement for your chapter. All components of your marketing plan should focus on fulfilling your chapter's mission and goals. In a succinct sentence or two, your mission statement should provide long-range guidance and direction for your chapter.

When developing a mission statement, it is desirable to gain input from your chapter's board of directors. With an eye on desired outcomes for your chapter and what it does for whom and why, your mission statement should be a carefully crafted, simple statement of purpose that:

- provides a positive "reason for being"
- offers focus and direction
- communicates a clear and concise message
- is agreed on by the wider organization.

The following mission statement is from the APICS Fox Valley Chapter's marketing plan.

"The mission of the Fox Valley Chapter of APICS is to be the area's leading provider of quality learning opportunities and networking, focusing on management of consumable and capital resources and operations staff in manufacturing and service industries."

Plan time frame

One of the early decisions you must make when developing a marketing plan is the time frame of the plan itself. Planning is commonly thought of as either short term or long term. Your chapter's management must determine both the short- and long-term planning needs of your chapter in relation to current objectives and issues it faces, as well as volunteer time and other resources available to undertake planning. If you have never developed a formal plan, you might want to start with a one-year or short-term plan. As you hone your process, you may wish to add longer-term components to your efforts. The longer the time frame of your plan, the more visionary and less certain it will be.

Parameters of short- and long-term plans

Planning parameters	Short-term plan	Long-term plan
Time frame of plan	Usually one year	Usually three to five years
Frequency of planning	Annually, with interim reviews	One+ year
Depth of plan	Strategic and tactical	Strategic and visionary
Budget and resources	Known budget, limited	Projected budget, less limited
Environmental analysis	More known	Less known

PART 1: MARKETING PLANNING

Short-term planning

Commonly, short-term plans are considered to have a one-year time frame. The purpose of a short-term plan is to identify the best strategies to achieve its mission and objectives—and to prioritize the resources required to achieve those goals. The short-term plan is both strategic and tactical; it identifies current objectives and gets into the finer details of how to achieve those objectives. A short-term plan provides a road map for everyone to follow in meeting key chapter goals set for the next year. In addition, it helps ensure you have enough people and financial resources to implement those key chapter goals and ensures you effectively use the resources available.

Long-term planning

Long-term plans typically have a 3-year, 5-year, or even 10-year time frame. Long-term plans attempt to capture the organization's vision for the distant future by considering any perceived current and projected trends, client needs, opportunities, and limitations. Because of the longer-term scope, this plan's objectives, strategies, and budgets are more visionary than statements of accountability and are less detailed and tactical. Chapters vary in how often they undertake long-term planning; some go through this process biannually, while others may review the longer-term plans annually or less often.

Products and services

The product is anything your chapter offers. Products include new and existing membership services, educational workshops, and certification review courses. Materials also include books, newsletters, chapter and corporate websites, magazines, conferences, special functions, exhibits, and sponsored functions that the chapter participates in or produces. A service is any kind of administration your chapter offers. Services include membership assistance, recommendations, and referrals. The services that surround the products offered are what enhance the value of a customer's involvement. Before you can develop an effective promotion, you must have a thorough understanding of your products and services.

Products and services matrix:

Offering	Product	Service
APICS membership	The purchase of level of membership	Administration of membership and reminding or distribution of member benefits
Certification	Sale of courseware products	Guidance through the certification process
Education courses	Sign-up for educational offerings	Follow-up with participants for course opinions and evaluations
Career networking events	Sale of tickets or sponsorship for event	Investment in assisting corporate and professional members achieve their goals

PART 1: MARKETING PLANNING

Achievable goals

Undoubtedly, your chapter has a strong purpose. However, it is imperative that your mission or purpose be translated into clearly definable and achievable goals. These goals may be written in various ways. Specific goals will facilitate both the development of actionable strategies and the measurement of whether you have achieved what you set out to accomplish.

Before deciding how to market your chapter, you must first determine why your programs and offerings need to be marketed. In the context of APICS chapters, the ultimate marketing goals are listed in the following figure.

Goals matrix:

Overall Goal	Quantitative/Qualitative	Your Chapter's Achievable Goal
Grow your chapter's membership	Quantitative	Obtain the below numbers of new members for a total of ____ new members ____ Professional ____ Academic Professional ____ Enterprise
Increase participation in chapter certification review classes	Quantitative	Increase revenues by \$_____
Keep members engaged and coming back	Qualitative	Establish member recognition program
Increase member attendance at chapter professional development meetings, seminars, and workshops	Quantitative	Increase attendance by ____% utilizing newsletters, advertisements, Web site content and membership directories that keep members and customers informed of upcoming events and connected with one another
Increase member engagement	Qualitative	Offer workshops and meetings with allied organizations that enable members to network with colleagues
Increase public visibility	Qualitative	Run ads on local radio stations and in regional publications

Situation Analysis

Situation analysis often begins with an analysis of your chapter's environment, including the internal and external surroundings, conditions, and climate in which your chapter operates. Having a shared understanding of your chapter's environment provides a solid foundation upon which to develop successful planning strategies to achieve your chapter's marketing goals.

Going through a formal situation analysis will help you identify your chapter's customers, enable you to set appropriate product prices and service values, and heighten your awareness market competition.

Identifying Customers

It is important to remember that all good customer recruitment is targeted. If you try to reach everyone using a single approach, it often will lead to weak results. The most effective way to recruit members and participants is through targeted efforts applied to specific populations of people. Sometimes, you may have more than one target audience. In that case, it is common to state a primary audience and one or more secondary audiences.

PART 1: MARKETING PLANNING

It is best to first strategically determine which populations in your community would best fit the recruitment needs of your chapter. Targeting specific groups with specific recruitment goals will affect the content of your promotional materials, the types of individuals you contact, when and how often you conduct outreach efforts, and the types of communication methods you use.

Strategies and tactics form the core of your marketing plan. A strategy is a course of action created to achieve a future goal. Tactics are more detailed activities that support a given strategy. Marketing is about accomplishing objectives, and the strategies and tactics you choose will fuel the success of your chapter's efforts. Together, strategies and tactics represent the action of your marketing plan. Take the time to think strategically by keeping a focus on your goals, then determine the best actions to meet those goals.

To build a customers matrix like the sample below and heighten your understanding of prospects, use the customer profile worksheet found in the appendix.

Customer matrix:

Level	Customer type	Customer segments	Product goal	List development	Main product and service benefits
1	Prospect companies	Senior level executives Managers	Enterprise membership	Manually compile a database list of companies in your region using the internet, business listings and directories Rent list of companies that fit a target revenue criteria	APICS and chapter resources available to entire team Helps company maintain competitive edge
2	Prospect professionals	Managers Coordinators Assistants	Professional membership	Attend networking events and tradeshows Ask current involved members to recommend a friend	APICS e-newsletters and publications Chapter educational offerings Chapter networking events
3	Members	Certified members Non-certified members	Purchase certification courseware Participate in certification course	Segment member list by certified and non-certified individuals Attend and present at workshops and meetings hosted by allied organizations	Certified individuals earn 10-19% more than non-certified individuals
4	Vendors	Non-members	Networking involvement Education and event sponsorship	Manually compile a database list of companies in your region using the internet, business listings and directories Ask members to recommend companies and provide their contacts	Chapter networking events Sponsorship opportunities
5	Public	Non-members managers	Professional membership Education and event attendance	Manually compile a database list of media outlets and opportunities in your region using the internet, business listings and directories	APICS membership Chapter educational offerings Chapter networking events

Use the market segmentation forms located in the appendix to assist you in identifying your chapter's market segments and complete your customer matrix.

PART 1: MARKETING PLANNING

Setting prices

Pricing includes member or non-member fees, early-bird discounts, and group discounts. Remember, the perceived value of a product or service must equal the price. The customer's perception of value is changing from one that is strictly monetary-based to one that includes other lifestyle factors. For example, will customers spend less time on a hobby to attend an education course if it means they can apply the practices for greater efficiency and recognition at their company? Market research often reveals that price is relatively unimportant compared with other considerations.

Testing of prices, promotions, and timelines is absolutely necessary to developing the right formula for your region. In each communication, the focus and intention must first be the product or service and its benefits. The promotion is not the motivating factor for your customers to act. It only helps them move on acting during a projected timeframe.

Being competitive

The specific limitations or challenges to your chapter's competitive abilities either already exist or can easily be projected. Some of these factors may be less tangible, such as identifying potential connections with target communities, businesses, organizations, and the media. In particular, you will want to closely examine other chapters and organizations you compete with for members, volunteers, and customers—as well as identify what they do well, not so well, and why.

The following are types of internal and external factors to consider when conducting a competitive analysis.

Competitive factors

Internal factors	External factors
<ul style="list-style-type: none">• Board competencies• Current ability to meet member needs• Past successes and failures• Budget resources and constraints• Chapter reputation• Technology issues• Marketing capacity	<ul style="list-style-type: none">• Community demographics• Relevant current issues• Strengths, weaknesses, and activities of competitors• Economic trends• Local, state, and national political climate

A commonly used competitive analysis tool is called a strengths, weaknesses, opportunities, and threats (SWOT) analysis. A SWOT analysis lists the internal and external advantages and disadvantages that may have an impact on the success of your chapter. Internal environmental factors are listed as strengths and weaknesses, whereas external factors are listed as opportunities and threats.

A common approach to performing a SWOT analysis is to conduct a meeting using large tear sheets to gather input from other committee members. Beforehand, you may want to assign members to research and investigate particular factors, such as other chapters/organizations in your area, governmental factors and the political environment, and the needs of your members.

PART 1: MARKETING PLANNING

The following example provides a simplified version of a SWOT analysis for an APICS chapter with a primary goal of increasing membership.

	Positive	External
Internal	Strengths <ul style="list-style-type: none"> • Successful APICS chapter (40 years) • Strong, stable board of directors • Strong certification class offerings • Fiscal reserves above goal 	Weaknesses <ul style="list-style-type: none"> • Several board members holding roles for multiple years in a row • Media relations undeveloped locally • Weak awareness in community • No in-house marketing expertise
External	Opportunities <ul style="list-style-type: none"> • Successful APICS chapter (40 years) • Strong, stable board of directors • Strong certification class offerings • Fiscal reserves above goal 	Threats <ul style="list-style-type: none"> • Several strong competing organizations locally • Members increasingly interested in online course offerings

Financial and time commitment

Your marketing plan should summarize the projected hard costs of your strategies and tactics. These costs should represent close estimates, even though final breakdowns of costs may not be known until strategies are actually implemented throughout the year. The table below provides a simple example of a marketing plan budget summary. The format of your budget summary likely will depend on how your chapter treasurer wishes for it to be displayed. If data are available, you may wish to add columns showing historical budget comparisons with prior years to demonstrate where there are changes in activities.

The following is from the budget section of the APICS North Texas Chapter's marketing plan:

Project #	Description	Anticipated Costs
001	Email to all nonmembers outlining benefits of membership once per quarter during the board year.	\$25
002	United States Postal Service (USPS) mailing to known manufacturing companies headquartered in the chapter's geographic area outlining the benefits of corporate membership by year end; this mailing will include a survey on needs.	\$150
003	Email to applicable members and nonmembers three weeks before an educational offering encouraging participation.	\$25
004	Email an informative flyer encouraging participation for all chapter non-education events one week before event starts.	\$25
005	Support top management night participation by e-mail and USPS mailing to appropriate companies.	\$225
006	Support joint association participation through e-mail.	\$25
007	Establish both a volunteer and a company recognition program by May.	\$450
008	Establish at least two announcements for radio and/or TV that prominently mention APICS by board year end.	200
009	Establish a marketing metrics program by end of August.	\$0
	TOTAL	\$1,125.00

PART 1: MARKETING PLANNING

Take the opportunity to project soft costs as you develop your budget. This will be essential to understanding how to divide projects among staff and volunteers. Remember hours can be just as expensive, if not more, than the actual hard costs of an initiative. You may identify efforts that have to be tabled because the resource hours to accomplish them are not available.

Estimated hours by campaign type sample:

Campaign Type	Timing	Projected Annual Hours
Email	Developed and setup quarterly	275
Direct mail	Two campaigns developed, collateral created and managed through the process	300
Outbound call	Conducted one day each week	350
Social	Monthly posts, group updates and blogging	450
In-person	Attendance of networking, conventions and other events	400
	TOTAL	1775

Implementing the Plan

Once your marketing plan is complete, you must effectively implement the strategies and tactics you developed. Having solid strategies—and implementing them well—leads to the greatest success in recruiting members. It is common to think of marketing as a finished product or outcome of one type or another—a marketing plan, brochure, press release, or event. However, to reach completion, each was also a project that had to be managed. Applying the principles of good project management will help you tackle the wide diversity of tasks for which you are responsible and help improve results when implementing your marketing plan.

Project management

Project management is the management of tasks, resources, time, and money to meet a specified goal. Project management details what must be done and in what order, what resources and people are needed, where approvals must be obtained, and when to schedule project meetings. How you go about managing these details will depend on the size of your chapter, your financial resources, and the complexity of each individual project. Project management essentially involves organizing and orchestrating a number of elements to achieve a desired end result.

Plan evaluation and review

While the development of your marketing plan should have definite start and completion dates, planning is ongoing. As you complete your marketing plan and begin implementing its strategies, you must monitor its effectiveness and make adjustments along the way. If a particular strategy is working well, you may choose to do more of it and less of something else. Likewise, if a planned strategy is not bringing the results you hoped for, you may want to evaluate why and make adjustments. Don't wait until next year's planning process to make needed corrections. However, keep in mind that a marketing strategy producing lower than expected results may not necessarily be poor strategy. The results of a given strategy can be affected by a number of factors,

PART 1: MARKETING PLANNING

including environmental changes, a difficult-to-penetrate target audience, timing issues, or how well the plan was implemented. You must be flexible and ready to refine your marketing plan as needed.

In some cases, you may need to abandon the strategy altogether. For example, your plan may include a strategy to implement an advertising campaign using small weekly ads in your local newspaper. Ad space costs money, and after the first quarter you only received two inquiries from this effort. You may then want to evaluate the impact of the ad itself and whether to continue placement of the ad. It may be that the ad itself is fine but placement was poor, and you either cannot control this or it costs more to get good placements. You may determine that most of your current members and class attendees arrived at the chapter via word of mouth and, therefore, the cost effectiveness of your ad strategy does not justify continuing the campaign—even though you have the budget to do so.

Marketing plan review meetings

You do not need to undertake marketing planning activities every day, but you should keep a watchful eye on the ongoing effectiveness of your plan. One sound evaluation strategy is to conduct monthly or quarterly marketing plan review meetings. Reconvening your planning team quarterly to review results and brainstorm any adjustments for the next time frame can be effective and well worth the effort. These meetings can produce a number of positive outcomes:

- Objectively reviewing plan results to date
- Acknowledging changes in the internal and external environment
- Brainstorming new strategies and tactics, as needed, for the next quarter
- Drafting the details of upcoming marketing strategies.

Finally, it is a good idea to conduct a thorough review of your entire plan once a year before developing the next year's plan. Take a step back and review the year's marketing efforts, including any adjustments made along the way. For marketing plan samples, visit cbox.apics.org.

PART 2: MARKETING COMMUNICATIONS

PART 2: MARKETING COMMUNICATIONS

Delivering Effective Messages

By reviewing the strategies and tactics of your chapter's marketing plan, you will quickly discover that nearly every marketing activity you planned requires communicating to someone. A key component of the planning process is to define a target audience: the group to which you want to "market." The specific goals and strategies of your marketing plan require a desired action from your target audience (e.g., get people to join your chapter). The only way to get your target audience to perform that desired action is to find, connect, and persuasively communicate to that demographic.

Marketing communications is an area that involves considerable subjectivity. The messages and graphics you create for your chapter cannot be graded as simply "right or wrong." While some people may really like a particular message, it will have little or no appeal to others. Judgment, creativity, and personal preference are at play in how marketing communications are both created and received.

APICS has a variety of tools and techniques for communicating with chapter members. For more information on public relations and branding strategies, see cbox.apics.org.

Managing campaigns

While marketing campaigns are not the only projects you may manage as part of your marketing plan, they will comprise a significant portion of them and require special consideration for a number of factors. Because marketing campaigns can involve considerable creativity, how you manage them requires special attention. A sound project management process can greatly enhance your communications results.

Using the tools of basic project management can aid in the effectiveness of your marketing communications. Similar to managing any project, successfully managing marketing campaigns requires establishing key project milestones along the way, such as meetings, project objectives, revisions, member and board input and approvals, testing, and completion dates.

Unlike your overall marketing planning, where it can be helpful to have more people involved to add ideas, experiences, and resources, having too many people involved in the process of developing communications projects can actually dilute the end results. In this case, less is more. Having too many people involved often means everyone wants some part of their ideas in the final message, which can result in an unclear message rather than a sharp, spirited, and focused message.

While it is likely that your chapter board president will want to be involved, or at minimum provide review and approvals, your creative team may be as small as yourself, one or two other committee members, someone to write the message, and a designer. It is best to designate a single person as writer or designer. The writer is responsible for drafting initial message concepts, incorporating any feedback provided via testing or chapter staff, and developing the final, polished versions of the message. Similarly, a designer should be involved from start to finish, providing initial concepts through final revisions.

Your communications do not have to be expensive to be effective. Many chapters create their own brochures, flyers, and advertising in-house. It helps to have someone involved who has experience in either writing or graphic design.

PART 2: MARKETING COMMUNICATIONS

Planning your communications efforts

Each target of your chapter should have its own plan detailing what messaging by what method the group will receive. This detailed plan will include schedules, descriptions of communications pieces, group count, anticipated costs and budget, goal conversion rates and responsible volunteers and/or staff.

Communications Vehicles

Regardless of the type of promotional vehicles you use, make sure to consistently communicate a few key components of your chapter. Space considerations may affect how much information can be included, but consistency in the message is essential. Ensure your chapter name and APICS chapter logo are visible and treated uniformly across all items. This means using fonts and colors consistent with APICS branding. See cbox.apics.org for more information about APICS branding standards.

Be sure to include contact information for your chapter—particularly, a phone number and email address—so people can easily connect with you. Listing additional information about key features and benefits of your chapter depends on the overall space and type of media being used.

Web

Chapters should also remember that the chapter website is an excellent marketing tool. The chapter website can be used as an input and output tool when looking at marketing. The website should offer a place for feedback from members and nonmembers. Additionally, websites provide a superb way of reaching out not just to your local audience but worldwide.

APICS has a variety of tools and techniques for communicating with chapter members. See cbox.apics.org for examples.

Designing and hosting

One of the biggest challenges to designing and hosting your chapter's website is the availability of chapter resources—both time and money.

Deciding on content

With simple HTML code and the APICS chapter website template found in cbox.apics.org, you can offer basic information, articles, editorial comments, calendars, special events, and links to other sites. You might want to try just a few pages to begin with and add more as you get feedback from your members and other visitors. Make sure to provide an email link for visitors to give you their comments.

Some chapter website content suggestions follow:

- Post the chapter's mission statement, history, and a summary of what the chapter does.
- Include contact information for the chapter.
- Post chapter governance information, including chapter bylaws, financial statements, policies, and the annual report.
- Include a list of chapter officers and their respective contact information with permission from the individuals.

PART 2: MARKETING COMMUNICATIONS

- Information on how to become an APICS member.
- Post a chapter calendar of events and courses.
- Outline sponsorship opportunities.
- Post chapter volunteer opportunities.
- Put up-to-date information about upcoming chapter programs. If your chapter has the technical capacity, accept online registration.
- Include links to other websites with information of interest to your members, including a link to the APICS website.
- Create an online, local job bank and include a link to the APICS Career Center at apicscareercenter.org.
- Put your chapter membership directory online with members' permission. This makes it more up-to-date and easier to search.
- Put a membership application online or link to the APICS membership application at apics.org.

Deciding on layout

APICS has developed a website template designed for ease of use by anyone who has a very basic understanding of HTML and any web editor such as FrontPage, Dreamweaver, GoLive, and so forth. Basic design issues have been simplified by taking the greatest advantage of cascading style sheets and a very simple HTML markup. With a basic working knowledge of any common web editor, your chapter's content can be up on your website easily.

Visit cbbox.apics.org for more tips and information and to access the APICS website template.

Electronic

There can be many advantages to sending electronic communications. Electronic communication can

- Save the chapter money
- Reduce the time chapter staff and volunteers spend processing applications, renewals, registrations, and so forth
- Give members information in a more timely manner than is possible with print vehicles
- Encourage members to connect and communicate among themselves
- Make it easier for members to access and use chapter services.

Remember CAN-SPAM is a law that sets the rules for commercial email, establishes requirements for commercial messages, gives recipients the right to have you stop emailing them, and spells out tough penalties for violations. Chapters must follow guidelines outlined by the Federal Trade Commission. It is advised that chapters use a tool such as ExactTarget, Vertical Response, Constant Contact, or other online electronic communication campaign service provider for sending all electronic communications, managing email lists and acting within the guidelines of CAN-SPAM. For more information visit business.ftc.gov/documents/bus61-can-spam-act-Compliance-Guide-for-Business.

PART 2: MARKETING COMMUNICATIONS

Social networking

Sites like LinkedIn and Facebook allow organizations to connect with interested professionals. Establishing a group on these sites and focusing on building connections will help your chapter gain and maintain visibility. Social networking can be tremendous asset to your chapter as it offers a quick and cost effective way to promote your initiative, courses, and involvement opportunities.

For tips on setting up and effectively using these sites visit cbox.apics.org.

Outbound calling

Remember your chapter offers a host of benefits that prospects in your region want and need, but area members may just not be aware that they exist. Members also welcome the occasional phone call to check in and often lead to a stronger sense of value and engagement. Outbound calling should always be very targeted, utilize a script and have a very specific and direct call to action.

Print collateral and direct mail

You will most likely use a variety of printed collateral and direct mail as you embark on marketing your chapter. Nearly all print collateral—such as flyers, posters, brochures, and bumper stickers—can be used for a variety of purposes. While they may be used in a highly targeted way they are usually quite versatile in their ability to be used for other program objectives or target audiences. For example, letterhead and business cards are suitable for a variety of marketing and other business uses. A marketing brochure may be used to build general awareness while also communicating the benefits of membership and how to join.

As you start your program, make a few selective choices that will give you the most mileage for your budget. A simple program brochure and flyers are among the most common promotional items to start with.

Design Basics

Laying out a basic brochure of information about your chapter may seem like a simple task. However, those attempting to embark on the design and layout of such a project may quickly find themselves with questions about how much information to include, where things should go, what sizes and fonts to use, where to add pictures or graphics and how many, and in what order everything should be placed. It is at this stage you realize how handy it is to have your message already developed. Trying to create your message and design at the same time can lead to confusion.

The following basic elements can help you create more effective design environments for your marketing communications. There are a number of design models, and many more design elements, that you can study and become familiar with. Always think in terms of your positioning statement and what you want to portray.

Also, keep in mind APICS branding standards when creating promotional materials. For more information about APICS branding, including APICS color palettes and logos, visit cbox.apics.org.

PART 2: MARKETING COMMUNICATIONS

Headline

Depending on what is being developed—a brochure, flyer, or advertisement—you will want to make sure it has a headline. Headlines are used to draw attention; they should be set in bold type and placed at the top or beginning of your communication piece.

Organization of information

Be clear about the audience your marketing piece is directed at, and make sure that this is the audience you address throughout its development and production. Categorize information, if possible, under subheadings and prioritize your message points. For example, you may want to divide information into different categories, such as the mission of your chapter, its benefits to members, chapter offerings, and how to contact the chapter.

Organization of space

Consider where information should be placed. You may have to make trade-offs between how much information you can include and readability factors, such as the need for breathing room on the page or what is called “white space.” Often, more attention is obtained by creating space around a piece of information than by filling a page with more information.

Pictures

Pictures and other illustrations also are helpful. Having pictures of chapter events can draw people in to find out more about your chapter. Make sure your pictures are representative of your target audience and that you have acquired necessary permissions to print them.

Graphics

As with pictures, graphics can support or detract from your project. Carefully choose them by making sure they complement—rather than distract or detract from—your message. If you are unable to solicit the aid of a design professional, lean toward keeping graphics simple.

Color

If color is an option, be sure not to overdo it. Too much brightness, too many colors, too much contrast, or too many shades can all be distracting to viewers. Pick a well-contrasted and simple color scheme and stick to it. If you are using only black type but colored paper, pick light to medium shades that keep the focus on your information and are not glaring, distracting, or difficult to read.

Fonts

Use easy-to-read fonts, in a large type size, to make reading comfortable and easy. Do not use more than two or three fonts in any one brochure, flyer, or advertisement. Use consistent fonts across the various marketing pieces you produce, including the type on your logo and/or slogan.

PART 2: MARKETING COMMUNICATIONS

Contact and chapter identification

Provide a clear area for your chapter name, address, and other contact information. For multiple-page brochures, you may include this information in more than one place. Also, be sure to include the APICS logo on all marketing communications. Placement of the APICS logo should be kept as consistent as possible across your marketing communications, as it strongly contributes to the branding of your chapter.

Mailing guidelines

For all direct mail pieces, refer to the guidelines available at [USPS.org](https://www.usps.org) or consult a mail house for more details. For large mailings, take advantage of non-profit rates and get discounts for providing your lists sorted by certain criteria.

Promotional items

Often promotional items are purchased to create excitement, build awareness, and reinforce brand recognition. There are usually a number of businesses in any area that specialize in promotional items, such as pens, pins, bumper stickers, and so forth. Searching online should provide numerous resources as well. Pricing can vary greatly across items, but you should be able to find some suitable items for your purposes at an affordable cost.

Personal contact

There is great power in face-to-face, personal communication. People respond more positively, and engage more enthusiastically, from having made personal contact than by looking at a brochure, reading an ad, or viewing a website. When communicating, the more personal the process, the easier it is to build rapport and make your audience feel connected to your chapter. Personal contact enables you to more effectively build the critical relationships needed for your chapter's success.

Build word-of-mouth strategies into your marketing plan, either via one-on-one opportunities or by addressing groups (such as professional development meetings). Over the long term, reaching people on a personal level and building relationships have proven to be effective. Strong relationships are key to building positive perceptions and chapter image. Many people join in response to a direct request of a friend, coworker, or acquaintance. Ask others who have a vested commitment in your chapter—board members and current members—to tell the people in their lives about your chapter. Leveraging connections can create a multiplier effect, which can greatly benefit your chapter. To begin building this type of volunteer network, you will need to evaluate your own chapter to determine the most natural networks available to you.

As you get others to help in recruitment efforts, be sure you build “quality control” into the message they are all delivering. By keeping your message simple and strong, and clearly communicating and training others to communicate about your chapter, you will help all members better align with your goals. This will help you create a stronger presence throughout your community and communicate the APICS brand more effectively.

PART 2: MARKETING COMMUNICATIONS

Communications Types

Annual report

The chapter's annual report should summarize the previous year's goals and progress toward those goals, successes, financial status, membership statistics, key projects, activities, and products and services. In addition, creating an annual report is a chapter minimum standards requirement. The annual report should summarize the chapter's performance in key areas.

Communication recommendations:

- Email members a letter from your chapter leader and include a link to an online PDF of the annual report document for viewing.
- If the report is small, make copies available at an annual meeting. If the report is large, make flyers including a link to where members can view the report online.
- This time is an excellent opportunity to find out more about your members and improve their experience. Use a survey to obtain information on what products and services they find most beneficial.

Meeting announcements

Calendar meeting announcements are one way to communicate to your local community about your meeting. The chapter meeting announcement should be sent out regularly and contain the following information:

- The meeting topic and speaker (highlighting a connection to a current trend or issue, if possible)
- Time, location, and directions
- Agenda (can be a brief overview)
- Cost, if any, for attending the meeting
- RSVP policy (including whether there is a discount for registering in advance).

Communication recommendations:

- Highlight the event on your chapter's website.
- Email an announcement and reminder messages to members and prospects. If there is a difference in cost for members versus non-members, be sure to segment the lists and send an additional promotional message about joining to obtain the lower price.
- Include a meeting schedule with important details in all mailings.
- Make calls to members who have not recently attended or have not opened the announcement and reminder messages to make sure they are not missing the opportunity to attend.
- Place a public service announcement (PSA) or public service ad with local business journals, newspapers, radio stations and television stations.
- Post your event online utilizing networking sites including LinkedIn, Facebook, Meetup and industry and education blogs.
- Contact and invite members of the local community and media to attend.

PART 2: MARKETING COMMUNICATIONS

Newsletters

A printed or electronic newsletter serves as an excellent means of providing information about developments in the chapter and industry. Many chapters use the newsletter to provide information about upcoming meetings and events, as well as more in-depth content such as interviews with leaders in the field or Q&As with an expert on a particular trend.

Communication Recommendations:

- Ask vendors to sponsor a newsletter for a fee in exchange for advertising space.

Promotional

A promotional communication is any message that is specific to achieving one single desired action. These types of communications should be very direct, targeted, and used sparingly. When done correctly, these communications are very effective at driving response.

Developing a Timeline

Communication must be timely in order to be effective, which requires chapter leaders to establish timelines that enable members to plan their budgets and schedules. Adequate planning not only helps members by giving them sufficient advance notice about chapter events, but also allows enough time for the volunteers who produce programs and products to do a good job. Last-minute changes wreak havoc on production schedules and wear down even the most enthusiastic volunteer. Precious chapter resources become consumed with additional mailings to announce programs that didn't make the newsletter.

Ask three questions as you plan the timeline for your communications campaign:

1. How early do I need to begin getting the message out about this product or service? If you are selling something that has a deadline, such as a conference or workshop, the deadline will drive your timeline. You need to be sure to get communications out to the audience in plenty of time for people to fit the chapter event into their budgets and schedules.
2. How often should I repeat my message? In chapter communications, once is seldom enough. Your chapter is competing with countless other organizations and individuals for your members' and prospects' attention. So, you may need to communicate with your audience a number of times before they will respond.
3. What else is going on at the same time? It is important that you do not create your communications timeline in a vacuum. Consult with other chapter leaders to see if there are ways to combine messages about different products and services to the same audience.

PART 2: MARKETING COMMUNICATIONS

Communications Tactics

Getting members involved

Current members are powerful recruiters. Often, as a chapter grows, members become the single, most effective means of recruiting new members. Your current members are likely to have friends or coworkers with similar occupations and goals and can offer the best testimonials for recruiting new members.

Build a member referral recruitment campaign strategy into your marketing plan. A few ways you can get your members involved include:

- Inviting them to speak at member orientation and training sessions for prospective and new members
- Directly asking them to inform and invite their friends and associates to become members.
- Providing recognition or awards to members who successfully recruit new members.
- Contacting appropriate people at their places of work.
- Getting quotes from them to put in your promotional communications.
- Asking them for ideas as to how they can help with recruitment.

Approaching organizations, company coordinator programs

Another solid recruitment strategy worth pursuing is appointing a board member or committee in charge of targeting various organizations in your community. Organizations are often made up of many like-minded individuals and offer an efficient opportunity to recruit members by being able to reach many individuals in a single effort. Approaching organizations offers the same great value that comes with any face-to face contact: personal interaction and the opportunity to build relationships.

Public Relations

Public relations (PR) is a specialized function of marketing and an important means for gaining publicity. PR involves getting the attention and interest of media professionals who work for newspapers, magazines, and radio and television stations. When doing PR, your messages are developed in particular formats and must go through news reporters, editors, and other media staff, who, in turn, decide how much of your information they will use, if any, and in what way. The benefit is that you may receive significant free publicity for your chapter.

PR has strong advantages but also some disadvantages. The overarching advantage is that it is possible to get a lead story printed or aired about your chapter at essentially no cost. Because nonprofit budgets are often very limited, PR is an important marketing tool. The disadvantages or risks of PR are that there are no guarantees as to amount, timing, or placement of any coverage you receive. Short of creating a tape or video, you have minimal control over how much is printed or aired, if anything at all. Because many organizations—both for-profit and nonprofit—are vying for free publicity, you may prepare and distribute numerous press releases or public service announcements before seeing any results from your efforts.

PART 2: MARKETING COMMUNICATIONS

Public relations tips

- Be proactive and frequent in your PR efforts to ensure others stay aware of your chapter. When submitting media messages, always follow up with a personal call—each time—to ensure the targeted person received your piece.
- Remind PR contacts of the importance of your chapter’s work in the community. This is called “pitching” your message. Otherwise, your message can easily be lost in a large stack of press releases and other news announcements received daily in any busy news center.
- Show consideration of the scope and challenges of media professionals. You want to search continuously for prime news opportunities, but take care not to be a pest. Making contact too often can become annoying and result in media professionals avoiding you and your chapter.
- Recognize that media people often work under tight timelines. Submit materials on time and in easy-to-digest formats. Use clear language. Be truthful about your chapter. Additionally, be sure to formally thank them for their time whenever you make contact and, especially, if they provide any coverage for you.

Target media analysis

Look carefully at your chapter programs. What is newsworthy about them? What would interest the media? Is there a way to link something your chapter is doing on the local level with a national trend or a key message from APICS? What is the most effective and efficient method for getting this information out to the public? Once you have determined the programs or messages on which to focus for your chapter goals, decide which medium is most appropriate to use for communication.

Get to know your local media by reading, watching, and listening to the news sources in your area. Monitor the stories that are in the news and the reporters who cover them. Consider your relationship with the press a partnership that helps your chapter establish long-term programs and develop a working relationship that will be beneficial for everyone involved. It is important to understand, and work within, the media’s deadlines.

Media mailing lists

One of the first things you need to create is a mailing list of reporters (for each medium) to whom you will send your meeting announcements, press releases, story proposals, and so forth. Your list should include the following:

- Name of the writer or editor
- Title
- Publication
- Address
- Phone and fax numbers
- Email address
- Beat (the types of stories typically covered).

Also, include any special contact information about the reporter’s preferred format—email, telephone, or mail—and the deadline that the reporter typically works (e.g., noon every Wednesday).

PART 2: MARKETING COMMUNICATIONS

Public relations options

Regardless of the medium used, it is imperative that your message be newsworthy, clear, well developed, and able to grab the media's attention. The following are examples of some common PR vehicles. Use as many of these as possible that fit your chapter. Media staffpeople are familiar with these formats and know how to make use of them.

Press releases

The best vehicle for sending announcements to the media is a press release. A press release provides the editor, reporter, or producer with well-written, concise, and clear information regarding your chapter and event.

The basic format for a press release is relatively straightforward. If your chapter has letterhead, use it for the top of the release. Alternatively, you may want to create an electronic masthead specifically for press releases. Keep releases uniform so reporters can begin to recognize materials from your chapter. Samples of press releases can be found in cbox.apics.org.

A news release should include these elements:

- “News Release” typed on the top of the page. (This may already be included in the masthead.)
- Date before which the release should not be used, or if there is no need to hold the information, type “FOR IMMEDIATE RELEASE.” (Generally, this is positioned in the upper left-hand corner.)
- The lead paragraph. The first paragraph should start out with the five Ws: who, what, where, when, and why. A catchy lead, plus general brevity and clarity, are the most important attributes of a successful press release. If the event is going to have a special keynote speaker whose name the public would recognize, consider mentioning that in the lead as well.
- Body of the press release. Following the lead, provide two or three paragraphs elaborating on the information in the lead.
- Closing paragraph. Always include a brief background paragraph near the end of the release explaining what the chapter does, its purpose, and information about APICS.

Public service announcement (PSA)

A PSA is another commonly used PR tool. PSAs are targeted to local radio and television stations, which are required by law to air messages for nonprofit organizations. Contact local stations to learn how each station complies with this requirement and how you can best work with them to get your message aired. In most cases, you will have less than 60 seconds to get your message across. Choose your message well by strongly considering the medium's delivery and your target audience.

PART 2: MARKETING COMMUNICATIONS

Media interviews

While more difficult to garner, attaining a personal interview is a key goal of PR efforts. An overriding purpose of PR is to garner a news person's attention that will lead to a personal interview and generate a feature story, on-air interview, or guest appearance. This is where having a clearly determined core message and effective spokesperson for your chapter are crucial. These opportunities often come up unexpectedly and at the last moment. You must be ready for them. Prepare by talking to the interviewer in advance to determine what areas the interviewer finds of interest and to determine the likely direction of the story. Help the interviewer ask knowledgeable questions at the time of the actual interview.

Editorial opportunities

There are a number of editorial opportunities your chapter can pursue. Letters to the editor are effective for attracting attention to your chapter. However, it is best to have board members or chapter members write them.

Fact sheet

Fact sheets offer a great one- or two-page overview about your chapter. A fact sheet should explain what the chapter does and provide membership information, as well as other relevant facts and information.

Press kit

Many chapters create a press kit for the organization or for particular programs. A press kit includes the current press release and also can include any number of relevant and corresponding information that will present your chapter in the most positive light, such as brochures, APICS logos, fact sheets, backgrounder, chapter history, relevant pictures of staff or board members, and a list of board members and their respective positions. Press kits are handy to have when introducing your chapter to new media contacts or at major events. Also, they are fun to redistribute occasionally when you revamp and update your materials to give your chapter a fresh new look.

Advertising

Advertising is a widespread marketing tool for APICS chapters. Advertising varies from PR in some significant ways, namely all advertising comes with a price tag. However, advertising has some significant advantages that make it cost effective for the many chapters that use this powerful medium—mainly the large number of people that can be reached in a single effort.

Making advertising choices

Generally, when undertaking any advertising efforts, two key factors will influence your choices: (1) cost and (2) target audience coverage. Most widely circulated publications and radio or television stations should be able to provide you with a rate sheet that includes demographic information about readers or viewers. You will want to gather this information before making decisions about whether advertising makes sense for your chapter.

Customer Profile Worksheet

Customers can be segmented and grouped by the degree to which the segments share the same needs and, thus,

PART 2: MARKETING COMMUNICATIONS

the need for similar products and services. Some segments are more important than others. The importance is not always based on segment size. For example, if the number of vendor members equals or exceeds the number of active members, the active member segment is still considered the most important. Although vendor members are important, they are not the key segment.

Use the worksheet below to help you create a more complete picture of your customers, their needs, and influences. This document will allow you to easily create your customer matrix and assist you in developing your campaigns and messaging. In the space provided below, group the segments based on importance to the association. Use one form for each segment type listed below.

APPENDIX

CUSTOMER PROFILE WORKSHEET

Customers can be segmented and grouped by the degree to which the segments share the same needs and, thus, the need for similar products and services. Some segments are more important than others. The importance is not always based on segment size. For example, if the number of vendor members equals or exceeds the number of active members, the active member segment is still considered the most important. Although vendor members are important, they are not the key segment.

Use the worksheet below to help you create a more complete picture of your customers, their needs, and influences. This document will allow you to easily create your customer matrix and assist you in developing your campaigns and messaging. In the space provided below, group the segments based on importance to the association. Use one form for each segment type listed below.

Customer Type:

Prospect Companies Prospect Professionals Members Vendors Public Other

Estimated number in your region: _____ Individuals Companies/Institutions

List the top 5 most relevant products, services, programs or benefits to this customer type.

- 1.
- 2.
- 3.
- 4.
- 5.

List the top 5 job titles or descriptions that would be a decision maker for this customer type.

- 1.
- 2.
- 3.
- 4.
- 5.

Customer Profile:

Does segment member make purchasing decisions? yes no

Describe segment's purchasing process for high- and low-priced products:

High-priced:

Low-priced:

Is segment's market price sensitive? yes no

When does segment make purchasing decisions? Spring Summer Fall Winter

Identify "hot" issues affecting this segment (e.g., tax reform, deregulation):

Implications for needed products, programs, services:

For additional information and demographic profile information to expand your understanding of your customer targets go to apics.org/research.

MESSAGE PLATFORM WORKSHEET

For each communication, complete a new message platform worksheet. Each team members should review and approve the information outlined below before developing the communication piece.

Target Audience: Whom do you want to reach?

Primary Target:

Secondary Target:

Message Objective: What do you want this target audience to do or think after receiving your communication?

Message: What is the focus or central idea of your communication?

Do you meet a need of the target audience?

What is your promise to the target audience?

Evidence: What facts can you present to support your promise?

Media: What methods will be used to disseminate your communication?

Mandatory Content: What must you include by law, association policy, etc.?

Contact Point: How will the target audience obtain further information?

Approval: Who will proof, layout, and approve the final communication?

Reviewed by: _____

Date: _____

