Marketing 101 Toolkit
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FEATURING THE FOLLOWING HANDY TOOLS:

1, 2, 3 Marketing Tree
Marketing Inventory
Mechanism Manager
Tool: 1,2,3 Marketing Tree

HOW TO USE THIS TOOL:

This tool will help you figure out the very best ways to get the word out about your organization. You will answer three fundamental questions:

1. What does marketing success look like?
2. Who do you need to engage to be successful?
3. How are you going to engage them?

When you answer those questions in that order, you get laser-focused on your goals and how best to achieve them.

NOTE: It’s tempting to skip the assessment. Don’t! It will tell you exactly where you need to focus most. Ideally, each member of your team would do the assessment on their own. Then you’d come back together and compare your answers. Then—and only then—you move on to the Tree itself.

For more on how and why to use this tool, watch this quick video.
1, 2, 3 Marketing Assessment

1: Assess and Rate

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

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

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

2: Score

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

GRAND TOTAL: ______

3: Learn

Your Grand Total is: ______

0 – 24: Your current marketing efforts are probably not helping you achieve your goals. The good news is there’s nowhere to go but up!
25 – 39: The time and money you’ve invested in your marketing is moving you forward, but it needs some refining if it’s going to help you achieve your goals.
40 – 45: Congratulations! You’ve mastered the basics of good marketing. Now, with a little bit of fine tuning, you’ll be on your way to marketing success!

If WHAT is <10: Don’t even think about moving on to WHO or HOW. If you don’t know what marketing success looks like for your organization, you’re wasting your time and money.
If WHO is <10: Without knowing WHO the heck cares about your mission, you can’t effectively market to them. You’ll end up tweeting to 90-year old women, for Pete’s sake!
If HOW is <10: That’s okay. It simply means you need to realign your HOW with your WHAT and your WHO. The HOW is easy to adjust as you go, so spend time on your WHAT and your WHO and you’ll get great results.
1. What is the most important thing your organization does?
2. Why do your best supporters say they like you?
3. How do your best supporters find out about you?
4. Name some common characteristics of your best supporters – past and present.
5. What will be different for your organization one year from now if your marketing is successful?
6. What makes you more compelling than your competition?
7. Who, or what, is your competition?
8. How do your best supporters find out about you?
9. How do your best supporters say they like you?
10. Why do your best supporters say they like you?
11. Why does your organization exist?
12. Who needs to reach for your marketing to be successful?
13. Describe your organization in 140 characters or less.
14. What is the most important thing your organization does?
15. How will you measure the success of each marketing mechanism?
16. List the top three ways (e.g., flyers, events, Facebook) you will reach your ideal supporters over the next year. Assign who will be in charge of making each one happen and by when.
17. Imagine you are at a cocktail party. What would you say if an ideal supporter asked: “What do you do?”
18. Finish this sentence: We want to be known as the organization that...
19. Write your organization’s name here:
Tool: Marketing Inventory

HOW TO USE THIS TOOL:

Consistency is key to your marketing success. If you’re all over the map with your messaging, people will think you don’t have your act together. (Yikes!) This tool will help you bring all your messaging into alignment.

**Step 1:** Gather everything you have that talks about your organization (e.g. pamphlets, postcards, letterhead, business cards, website, blog, Facebook, Twitter, etc.).

**Step 2:** Fill out a row for each item.

**Step 3:** Create a consistent top-level message. (For help with that, see the Messaging Roadmap and Messaging Platform.)

**Step 4:** Finally, make sure everything uses the same language to talk about your organization and also gives accurate contact info. Bringing your messaging into alignment can take a little time, but it’s worth it.

Good luck!
<table>
<thead>
<tr>
<th>MECHANISM</th>
<th>ONLINE</th>
<th>OFF-LINE</th>
<th>CURRENT MESSAGE</th>
<th>WHAT WE SAY WE OFFER</th>
<th>WHAT CONTACT INFO HAVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>People who work for and with our organization. (We started the first one for you as this is generally your biggest and most overlooked mechanism.)</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Remember: Consistency is key.
Tool: Mechanism Manager

HOW TO USE THIS TOOL:

This tool makes sure you successfully put your plan into action. It is meant to be used after you’ve completed one of Claxon’s planning tools, e.g. the 1, 2, 3 Marketing Tree or the Marketing Action Plan. Those tools guide you through the process of identifying the top three ways you will reach the people who care most about your cause.

Once you’ve filled out the Mechanism Manager, share it with your team so that everyone knows who is in charge of doing which tasks and by when. At least once a month, review your Manager and make sure everyone is on task and on track to meet your goals!
## Mechanism Manager

**Example:** Fliers

<table>
<thead>
<tr>
<th>MECHANISM</th>
<th>BUDGET</th>
<th>SUCCESS METRICS</th>
<th>TASKS</th>
<th>DUE DATE</th>
<th>RESPONSIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2 hours to create</td>
<td># of calls/emails that reference fliers</td>
<td>1. Create flier</td>
<td>January 31</td>
<td>Sue</td>
</tr>
<tr>
<td></td>
<td>2 hours to post</td>
<td># of new client &amp; percentage of revenue from fliers</td>
<td>2. Get it printed</td>
<td>February 5</td>
<td>Pat</td>
</tr>
<tr>
<td></td>
<td>$50 for printing</td>
<td></td>
<td>3. Post flier</td>
<td>February 16</td>
<td>Pat</td>
</tr>
</tbody>
</table>

1. Create flier
2. Get it printed
3. Post flier

**Your greatness at a glance.**
WE HOPE YOU FOUND THIS TOOLKIT USEFUL!
Here are two other tools to help you market your mission:

Pitchfalls: why bad pitches happen to good people
1, 2, 3 Marketing Tree

Thanks for making the world a better place,
The Claxon Team

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