Strategic Marketing Planning workshop

5 October 2020
Christina Lister
www.christinalister.co.uk
@christinalister
Contents

• What is marketing and why it’s important

• Vision and mission

• A strategic framework: 5 steps to consider

• Marketing in a Covid-19 world
Takeaways

• Clarity on how your purpose informs your planning

• Tools and frameworks to structure your strategic marketing planning

• Insight into how to make your planning SMART and agile to respond to a period of disruption
What is marketing?

• Marketing is much more than simply selling, publicity, promotion

• The Chartered Institute of Marketing’s definition of marketing is:
  – “The management process responsible for identifying, anticipating and satisfying customer requirements profitably.”

• It involves:
  – understanding your competitors and the context you operate in
  – identifying and understanding your audiences
  – providing a service/product that your audiences want and value
  – reaching and communicating with your audiences
  – engaging them and retaining their custom
Why is it important?

A requirement of Museum Accreditation and:

- Understand audiences
- Ensures demand for your product/service
- Develops relationships
- Builds trust
- Helps you respond to changes
- Gives you a competitive advantage
- Generates brand awareness
- Builds authority & credibility
- Drives visits, participation, engagement
- Generates income, donations
Mission and vision
# Definitions and example

<table>
<thead>
<tr>
<th>Definition</th>
<th>Natural History Museum (2014)</th>
<th>Natural History Museum (2020)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vision:</strong></td>
<td><strong>Vision:</strong> To advance our knowledge of the natural world, inspiring better care of our planet.</td>
<td><strong>Vision:</strong> Our vision is of a future where both people and planet thrive.</td>
</tr>
<tr>
<td>- Desired end-state, long-term</td>
<td>- To maintain and develop our collections, and use them to promote the discovery, understanding, responsible use and enjoyment of the natural world.</td>
<td></td>
</tr>
<tr>
<td>- Aspirational, ambitious, motivational</td>
<td>- Mission: Our mission is to create advocates for the planet.</td>
<td></td>
</tr>
<tr>
<td>- Action-/Change-oriented</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- What the world/future looks like if you achieve your mission</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Mission:</strong></td>
<td><strong>Mission:</strong></td>
<td><strong>Mission:</strong></td>
</tr>
<tr>
<td>- An organisation’s reason for existing</td>
<td>- An organisation’s reason for existing</td>
<td>- An organisation’s reason for existing</td>
</tr>
<tr>
<td>- Should guide an organisation’s decisions on priorities and actions</td>
<td>- Should guide an organisation’s decisions on priorities and actions</td>
<td>- Should guide an organisation’s decisions on priorities and actions</td>
</tr>
</tbody>
</table>
Mission and vision: reflections

Core purpose, mission, vision

How do we normally serve these?

How have we been serving these the past 7 months?

Are any activities leading to ‘mission drift’?

Are our mission and vision still relevant & appropriate?

What else do we need to do to support our mission?

Do we want to continue these activities or reset?
Mission drift: poll results

Has your organisation drifted away from its original mission over the past few months?

- Yes: 5
- No: 7
- Not sure: 8
Marketing strategy framework
Marketing strategy framework

1. Situational analysis:
   Where are we now?

2. Goals and objectives:
   Where are we going?

3. Your strategy and approach:
   How are we going to get there?

4. Your actions and resources:
   What are we going to do to get there?

5. Evaluation:
   How will we know if we’ve got there?
1. Situational analysis: Where are we now?
## SWOT and STEEPLE

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal</td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
</tbody>
</table>

**External**

- Sociological
- Technological
- Economic
- Environmental
- Political
- Legal
- Ethical
## Example

### Strengths
- Committed & passionate volunteers
- Strong reputation for delivering community outreach

### Weaknesses
- No digital marketing expertise
- No in-house marketing staff

### Opportunities
- Capitalise on the trend for staycations
- Improve our green credentials
- Recovery funding

### Threats
- Uncertainty over the impact of Brexit
- Covid-19 restrictions
- Recession hit on income & visitors

### Environmental
- Sociological
- Technological
- Economic
- Environmental
- Political
- Legal
- Ethical
Competitor analysis

- Who are your competitors?

- Who are you competing with for your audiences’ attention, money and time?

- How do your target audiences view you in comparison to your competitors?

- What makes your museum distinctive compared to these competitors?

- What’s your USP?
Very competitive spot (avoid if possible)

What your target audience wants

Competitor advantage

Venn diagram

Focus on this sweet spot

What you do well

What your competitors do well

Avoid as competitors will do better

Irrelevant as audiences don't value this

What you do well
Situational analysis exercise

• Pick a model you think is relevant to your museum and/or you haven’t used before to have a go

• SWOT / STEEPLE; Competitor advantage circles

• Start to jot down ideas just to get the ball rolling
Pick a model

**SWOT and STEEPLE:**

<table>
<thead>
<tr>
<th>Internal</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
</tbody>
</table>

**External**

**Sociological**
**Technological**
**Economic**
**Environmental**
**Political**
**Legal**
**Ethical**

**Competitor advantage:**

- **What your target audience wants**
- **Focus on this sweet spot**
- **Very competitive spot (avoid if possible)**
- **Avoid as competitors will do better**
- **What competitors do well**
- **What you do well**
- **Irrelevant as audiences don’t value this**
2. Goals and objectives: Where are we going?
### Goals

**What:**

A desired result you want to achieve, typically broad and medium or longer-term. Should support your overall organisational mission, vision, values and business goals and be based on your findings in step 1.

**Examples:**

- To increase the number visitors who return within a year
- To attract more young families
- To increase income from events
- To increase the reach of our digital channels

### Objectives

**What:**

A target that you will work towards. They should be SMART (Specific, Measurable, Achievable, Realistic and Time-framed). They will help you meet your goals.

**Examples:**

- To sign up 500 new subscribers to our e-newsletter during 2021
- To increase our Facebook followers by 10% from 1 January 2021 to 1 January 2022
- To increase new users to our website by 10% during 2021
SMART objectives

1. **SPECIFIC**: Details what needs to be done
2. **MEASURABLE**: Achievement or progress can be measured
3. **ACHIEVABLE**: Objective is realistically achievable and accepted as such (but also challenging)
4. **RELEVANT**: Objective is important and worthwhile to your organisation
5. **TIME-FRAMED**: Time period for achieving objective is clear
What needs changing to make these SMART?

1. To increase the number of people who have learnt about our heritage

2. To have a 1,000% increase in visitors by March 2021

3. To have more website hits than the V&A

Diagram:

- 1. Specific
- 2. Measurable
- 3. Achievable
- 4. Relevant
- 5. Time-framed
3. Strategy and approach: How are we going to get there?
# TOWS

<table>
<thead>
<tr>
<th>TOWS</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunities</td>
<td>SO</td>
<td>WO</td>
</tr>
<tr>
<td>1</td>
<td>Maxi-maxi strategy</td>
<td>Mini-maxi strategy</td>
</tr>
<tr>
<td>2</td>
<td>Use strengths to maximise opportunities</td>
<td>Minimise weaknesses by taking advantage of opportunities</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Threats</td>
<td>ST</td>
<td>WT</td>
</tr>
<tr>
<td>1</td>
<td>Maxi-mini</td>
<td>Mini-mini</td>
</tr>
<tr>
<td>2</td>
<td>Use strengths to minimise threats</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## TOWS example

<table>
<thead>
<tr>
<th>TOWS</th>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Strong reputation for delivering community outreach</td>
<td>No digital marketing expertise</td>
</tr>
</tbody>
</table>

### Opportunities

<table>
<thead>
<tr>
<th>Threats</th>
<th>Opportunities</th>
<th>SO</th>
<th>WO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income drop from Covid-19</td>
<td>Recovery funding</td>
<td>Apply for recovery funding to deliver more community outreach</td>
<td>Apply for recovery funding and invest in training to upskill in digital</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Threats</th>
<th>Threats</th>
<th>ST</th>
<th>WT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Income drop from Covid-19</td>
<td></td>
<td>Develop ways to charge for community engagement to generate income</td>
<td>Focus on non-digital marketing to generate income</td>
</tr>
</tbody>
</table>
## Ansoff Matrix

<table>
<thead>
<tr>
<th>Adaptation of Ansoff’s Matrix</th>
<th>Your products or offer: programming, events, exhibitions, cafe etc</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Existing</strong></td>
</tr>
<tr>
<td>Your audiences</td>
<td>Market penetration</td>
</tr>
<tr>
<td></td>
<td><strong>What:</strong> Increase the visit or purchase frequency of current audiences with your current products and programmes</td>
</tr>
<tr>
<td>Existing</td>
<td>Market extension</td>
</tr>
<tr>
<td></td>
<td><strong>What:</strong> Attract new audiences with your current products and programmes</td>
</tr>
</tbody>
</table>
## Ansoff Matrix examples

<table>
<thead>
<tr>
<th>Adaptation of Ansoff’s Matrix</th>
<th>Your products or offer: programming, events, exhibitions etc</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Existing</strong></td>
<td><strong>Market penetration</strong></td>
<td><strong>New</strong></td>
</tr>
<tr>
<td><strong>Examples</strong>: expand opening hours; run your toddler activity every fortnight rather than every month; promote your planned temporary exhibitions and events to encourage more repeat visits; <em>initiate a loyalty scheme</em></td>
<td><strong>Product development</strong></td>
<td></td>
</tr>
<tr>
<td><strong>New</strong></td>
<td><strong>Market extension</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Examples</strong>: run a marketing campaign to change perceptions or raise awareness of your museum with new audience groups; run a special offer; promote an existing schools’ session to new schools</td>
<td><strong>Diversification</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Examples</strong>: develop outreach events for care homes; provide sensory kits, staff training and early opening for visitors who need a quieter environment to visit; create a co-produced exhibition with community partners; expand your catering offer (e.g. to include vegan and gluten-free options)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4. Your actions and resources: What are we going to do to get there?
The 7Ps: The marketing mix

- Product
- Price
- Place
- Promotion
- People
- Process
- Physical evidence
Product

• You’re likely to have many ‘products’ e.g.:
  – your temporary exhibitions
  – events
  – a Friends’ scheme
  – your café
  – your merchandise

• Identify what your audiences need, want and expect, now and in the future, to ensure that you will meet a demand:

  “We must give our customers what they want, not what we think they want.”
  (Chartered Institute of Marketing)
Price

• Your audiences should feel they get good value for money

• It’s about value > being the cheapest

• The higher the price, the higher a customer’s expectations

• Some customers are more price sensitive than others

• Existing customers are often less price sensitive than new ones
Place

• How is your product distributed to the customer?

• Available in the right place and the right time for them

• Your venue location is fixed…

• … but you can run outreach, pop-up museums, digital and online events

• Consider where and how you sell tickets, membership and merchandise
Promotion

• Communicating what you do and what you offer
• Match channels to your audiences
• Messages need to resonate (language, images and tone of voice)
• It’s a two-way process

• Consider:
  – **Why** do you want to communicate? (Purpose)
  – **Who** do you want to communicate to? (Audience)
  – **What** do you want to communicate? (Message)
  – **How** do you want to communicate it? (Channel)
  – **Who** should you contact / how do you use those channels? (Distribution)
People

• Your organisation’s people are valuable

• They represent your museum and impact customer satisfaction

• Consider all the potential interactions with visitors e.g.:
  – welcome greeting
  – assistance with any additional needs
  – shop sales
  – providing information and directions
  – tour guides

• They can be brand advocates and museum champions
Process

• Consider the whole process and systems that deliver a ‘product’ to a customer, the whole customer journey:

  - Awareness
  - Consideration
  - Decision
  - Visit
  - Retention
  - Advocacy

• The process should be pleasant, user-friendly and seamless

• Put yourself in your customer’s shoes
Physical evidence

• The elements of the physical environment that customers experience

• Visiting an unfamiliar museum can be risky for a first-time visitor

• How can you minimise this risk? For example:
  – a welcoming, tidy and attractive entrance area
  – photos in marketing materials
  – positive reviews
  – key information on your museum’s website
Resources

• Once you have decided what needs doing, add in:
  – Who will be responsible and involved
  – Timings for the main actions
  – The budget
  – Any risk factors

• The budget may steer the activities, or the activities may determine the budget, or a mix
5. Evaluation
How will we know if we’ve got there?
Evaluation

• Monitor regularly to ensure you’re on track and not wasting your time/money

• SMART marketing objectives make it easier

• Focus on evaluating key areas rather than everything – what metrics are important to you?

• Share the results

• Act on the results
Covid-19 and disruption
2020 impacting marketing/comms

- More digital engagement
- Reinvention, flexibility, experimentation
- Crisis communication
- Community and community management
- Relationships and trust
- Tone and empathy
- Pre-booking for visits
- Live and online events
- Monetising digital content
- Growth of e-commerce
- Diversifying income streams
- Social media advertising boycott
- Diversity, authentic allyship
- Accountability, cancel culture
- Need to be agile
Tips on staying agile and strong amid chaos

- Anchor everything in your purpose & mission
- Sort your admin out
- Monitor and finetune
- Be mindful of public mood
- Digital over print
- Reflect and listen
- Manage expectations
- Be kind to yourselves
What positives have there been for your marketing in 2020?
## Responses from participants:

<table>
<thead>
<tr>
<th>Comment</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public support has been fantastic - our visitors seem keener than ever to get behind us and support us now that we’re open again 😊</td>
<td></td>
</tr>
<tr>
<td>There has been a massive upswell in positivity and support for the museum. We have seen an increase in engagement and actual visits.</td>
<td></td>
</tr>
<tr>
<td>There has been a massive upswell in positivity and support for the museum. We have seen an increase in engagement and actual visits.</td>
<td></td>
</tr>
<tr>
<td>I have come from libraries to this new team. We obviously couldn’t have people in so we focused heavily on social media content and really built up a following.</td>
<td></td>
</tr>
<tr>
<td>National campaigns to get on board with</td>
<td></td>
</tr>
<tr>
<td>An opportunity to redefine our shop products, putting them more in line with our vision and mission. Hopefully with our users being more interested! Also, new relationships with local organisations</td>
<td></td>
</tr>
<tr>
<td>CV19 forced in a way an online shop focus which as generated some income whilst we are closed.</td>
<td></td>
</tr>
<tr>
<td>National campaigns to get on board with</td>
<td></td>
</tr>
<tr>
<td>Covid-19 gave us an opportunity to revisit a marketing strategy that had been in place for a long time, and to try new things.</td>
<td></td>
</tr>
<tr>
<td>Realisation of need for changeMedia interest pointed up capacity issuesLots of potential partners, keen to work together</td>
<td></td>
</tr>
<tr>
<td>Opportunity to try new things with lockdown</td>
<td></td>
</tr>
<tr>
<td>Covid-19 gave us an opportunity to revisit a marketing strategy that had been in place for a long time, and to try new things.</td>
<td></td>
</tr>
<tr>
<td>Existing online and digital resourcesOpportunities to reimagine projects and still achieve</td>
<td></td>
</tr>
<tr>
<td>People stuck at home value online content offered more?</td>
<td></td>
</tr>
<tr>
<td>Its given some time and space to reevaluate purpose and direction.</td>
<td></td>
</tr>
<tr>
<td>Public support has been fantastic - our visitors seem keener than ever to get behind us and support us now that we’re open again 😊</td>
<td></td>
</tr>
<tr>
<td>I have come from libraries to this new team. We obviously couldn’t have people in so we focused heavily on social media content and really built up a following.</td>
<td></td>
</tr>
<tr>
<td>Embraced digital tech more</td>
<td></td>
</tr>
<tr>
<td>Realisation of need for changeMedia interest pointed up capacity issuesLots of potential partners, keen to work together</td>
<td></td>
</tr>
<tr>
<td>Rethink whole heritage offer</td>
<td></td>
</tr>
</tbody>
</table>
Questions and comments