



Take a Marketing Field Trip

By Karen F. A. Fox

A field trip through your organization can open your eyes

Remember those field trips when you were in school? Maybe your class visited a museum, a historic building, an aquarium. Why? To see directly what otherwise you would experience only through reading, to make these places tangible, to deepen your understanding.

In the same spirit, let's go on a marketing field trip. This time we'll visit your own organization. If your organization doesn't have every "room" we'll visit, maybe the same activity takes place somewhere else.

Your organization may not have a public space where people come to meet with you. In this case, think of each "room" as a marketing activity that your organization needs to carry out.

Perhaps volunteers carry out some or many of these marketing-relevant activities. If so, invite them on the field trip so they can see how their work contributes to overall marketing efforts. Think about the paid staff and volunteers who perform the functions described: Are they the best people for the job from a marketing perspective? Are there essential marketing functions that aren't being performed by anyone?

The purpose of marketing is to create and enhance relationships that will benefit everyone involved and further your organization's mission. Your marketing activities should be geared to seeking out, attracting, and serving those who can benefit from what you have to offer, as well as attracting the resources — employees, volunteers, money, and other support — that enable your organization to do that.

In each room you will want to stop and ask the following questions:

- **Who works here?** Who comes here or contacts people here? For what reasons?
- **What needs are being met** here?
- **What actions** take place here?
- **How do the activities in this location** contribute to our marketing effort?
- **How can we do this** better?

“Most nonprofits need money but hate to talk about it.”

THE FRONT ENTRANCE —Attracting, Informing

Your front door may be an actual place — or it may be an 800-number, a Web site, a Yellow Pages ad, or the contact person for your organization. The marketing task is to attract people's attention and provide the information they need to contact you and begin a relationship.

The front door is not just an employees' entrance and a barrier to keep out the elements. Your physical front door sets the stage for visitors' expectations. The fact that they've come in person — not just a phone call — means that you have something they want — services, information, help — or something they want to offer. They've made the effort to come to you.

Additional Questions to Consider for this "Room":

- **Is your location accessible** by public transportation?
- **Is your location easy to find?**
- **Are the signs** clear, helpful, and welcoming?
- **Do your location, signs, and front door** convey that you're there to serve?

THE RECEPTION AREA —Welcoming, Hosting, Guiding

Whom are you expecting to walk in the door? And what will they need when they arrive? These two questions are marketing questions, because they concern who your organization serves — your target market — and your awareness of the needs of this market. When you understand the answers to these two questions, you can do a far better job of marketing and deliver a higher level of satisfaction.

Additional Questions to Consider for this "Room":

- **Is this the same place** where someone answers the phone? If so, is this person welcoming?
- **Does this person know the answers** to visitors' most frequently asked questions?
- **Does this person respond** to messages promptly?
- **Is there a user-friendly** voice-mail system?

“Your front door sets the stage for visitors’ expectations.”

THE EXECUTIVE DIRECTOR’S OFFICE—Leading, Directing, Monitoring, Friend-Raising

As the chief relationship manager for the organization, the executive director has a large marketing role to play. The executive director’s office is the setting for meeting with staff, board members, key donors, volunteers, the press, and others whose involvement with the organization is essential to its success. Be sure this office conveys the right tone.

Additional Questions to Consider for this “Room”:

- *Where is the executive director’s office* located? Is it isolated, or is it accessible?
- *Does this office communicate and reflect* the organization’s values and commitments?
- *Is the style of the office* an appropriate reflection of the organization?
- *What does the executive director do* to enhance the organization’s marketing?

THE BOARDROOM—Guiding, Supporting

The board of directors is central to the organization’s marketing effectiveness. In this room we want to consider what the board does to understand, build, and enhance relationships with the organization’s key constituencies.

One way to help make the connection may be to move out of the boardroom. Carol Weisman of Board Builders (boardbuilders.com) suggests holding occasional board meetings — or at least board retreats — where board members can see and feel how their efforts are related to the organization’s mission and marketing. For example, the board of a theater might meet on the theater’s stage, or the Boy Scout board at the camp (including s’mores around the campfire).

Additional Questions to Consider for this “Room”:

- *Do board members know* what marketing is?
- *Do they believe that they have a role to play* in marketing?
- *Can they describe the organization’s key constituencies*, what their needs are, and how the organization addresses those needs?
- *Are they close enough to the organization’s clients, staff, and other constituents* to understand how the board can guide and support?
- *Do board meetings include attention* to translating the organization’s strategic plan into marketing plans and activities?

THE DEVELOPMENT OFFICE—Planning, Relating to Donors, Stewarding

The job of development staff is to build relationships with prospective and current donors, to create opportunities to request support, and to help the executive director, staff, and

board develop prospects and ask for support to carry out the organization’s mission. The development office also needs to demonstrate the organization’s care in using the resources entrusted to it.

Additional Questions to Consider for this “Room”:

- *Does the development office have the necessary technology* to create and maintain databases of prospects and donors?
- *Does the development office reflect* the organization’s mission to visitors?
- *Do development staff members know how to build long-term relationships* on behalf of the organization?
- *Do they understand the importance of consistency* in representing the organization’s needs to donors and prospects?
- *Do they respond promptly* to requests and communications?

THE PERSONNEL OFFICE—Attracting, Training, Motivating

Employees — current and prospective — are the organization’s clients too! The personnel office needs to attract and serve the best-qualified and most committed candidates, and to carry out the screening and employment process in a way that builds loyalty and job satisfaction from the beginning. Providing appropriate training and development opportunities, giving constructive feedback, and encouraging employees’ engagement with the organization’s mission are all essential.

THE VOLUNTEER OFFICE—Attracting, Training, Motivating

The volunteer office is very much like the personnel office — except there is no financial payroll for the volunteers. Volunteer managers need to think through the marketing tasks of attracting the right kinds of volunteers and skills, just as if they were going out to hire paid staff. And since volunteers by definition aren’t “paid,” volunteer managers must think carefully about what other benefits the organization can offer.

Understanding the needs and motivations of volunteers should be part of the organization’s marketing research. Some volunteers are motivated by seeing how their efforts benefit the organization’s clients. For others, opportunities to learn and practice new skills, to meet new people and form friendships with like-minded people, or to contribute to the general betterment of the community are motivators.

Additional Questions to Consider for this “Room”:

If current and prospective volunteers “check in” at the volunteer office:

- *Do they always get a cheerful greeting* and personal recognition?
- *Are volunteer job descriptions* readily available?
- *Is there a place nearby* for volunteers to meet or socialize?
- *Are volunteers thanked* when they depart?
- *How do volunteers know* when they’ve done a good job?

THE COMMUNICATIONS DEPARTMENT—Informing, Integrating

Many people think that communication *is* marketing. In fact, the communications department staff is an important player in the organization’s marketing, but not the only player.

The marketing role of the communications department is to understand the communications needs of various components of the nonprofit, to help make these communications appropriate and attractive to key target audiences, and to make sure they reach the right people at the right time in the right way.

For example, the development office will need a variety of communications, including brochures, response cards, and press releases. The programs office will need help promoting its services. In addition to working on these individual tasks, the communications department should at all times think of the overall image and themes of the organization, then strive for consistency in all forms of communication, with appropriate adaptations for individual audience segments.

SERVICE DELIVERY AREAS —Serving Client Needs

If your organization provides direct service to clients, you probably have one or more physical locations where these services are delivered. These service-delivery areas give you a chance to perform the consummate form of marketing — delivering on your organization's mission by doing what your organization was founded to do, and doing it with competence and compassion. Your actions in delivering value to clients speak louder than your words, your brochures, and your latest press release.

Additional Questions to Consider for this “Room”:

- **Do these facilities reflect the needs** of those who will use them? If your organization serves elderly people, for example, are the chairs the right height, the print the right size, the distance easy to travel?
- **Do you demonstrate your understanding of people's needs** through where and how you provide your services?

THE BUSINESS OFFICE —Billing, Explaining, Assisting

Most nonprofits need money but hate to talk about it. The business office is often left to its own devices to collect money for services the organization has delivered and to follow up when there are questions or problems about billing or collecting money.

But from the client's viewpoint, the business office is an integral part of the organization. What it does — or doesn't do — affects clients' perception of the organization. A marketing-oriented business office provides clients with clear, easy-to-understand statements, answers questions promptly, shows empathy and a willingness to solve problems, and helps clients understand their obligations and how to fulfill them.

Case Example: The executive director of one community mental-health agency instituted a policy that required therapists to request payment from clients at the end of therapy sessions. Even though clients' fees were determined on a sliding scale, the therapists hated the idea of asking for payment because they believed money shouldn't come up in connection with therapy. On the other hand, clients were inclined to ignore bills when they had already received the therapy and left the agency. And the agency certainly needed the money to keep providing services.

When the policy was begun, it turned out clients didn't object at all. They were used to paying for every other service or product when they purchased it. They considered it quite appropriate to pay at the time they received therapy.

In fact, paying at the time of therapy made the therapy seem all the more worthwhile to them. This new procedure also meant that the business office could focus on helping clients in other ways.

THE MARKETING DEPARTMENT— Researching, Planning, Integrating

Some nonprofits think a marketing department is unnecessary because other parts of the organization are already “doing marketing.” They understand the functions of development, communications, publications, and volunteer coordination, but don't recognize the importance of integrating these activities to carry out the organization's marketing strategy.

What does a marketing department do, and how does it work with other parts of your organization? If you have a development office, a communications director, and a volunteer coordinator, then the role of your marketing department will be to do — or assist in doing — marketing-related research, and to plan and coordinate the organization's various marketing activities to serve its many constituencies.

THE END OF THE FIELD TRIP

Now that you've completed the field trip, what new insights do you have? Here are some lessons that may be on your list:

- **Marketing is everything** — not only communications and fundraising but all the relationships and exchanges that the organization creates — or hopes to create.
- **Everyone has a role to play in marketing.** Every part of the organization should reflect the marketing orientation of your organization, to serve its constituents and work toward accomplishing the organization's mission.

Look around, take a tour, take your colleagues on a tour, and see where marketing is — or isn't — taking place. Then take action to make the next tour better. 

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AFTER THE FIELD TRIP IS OVER

To learn more about Karen Fox's Marketing Field Trip, view her video course as part of the Society for Nonprofits' Certificate series (NonprofitWorld.org/LearningInstitute).

And for more on marketing your organization, check out these *Nonprofit World* articles at NonprofitWorld.org/members:

How to Keep Customers Happy: Market Research Is Key (Vol. 14, No. 4)

The New Marketing Model for Nonprofits (Vol. 22, No. 6)

Using Surveys & Focus Groups to Gather Market Data (Vol. 13, No. 3)

How to Conduct a Marketing Research Project (Vol. 3, No. 3)

The Nonprofit Marketing Disability—How to Overcome It (Vol. 15, No. 3)