

Marketing Planning Toolkit

Written and produced by Museums Worcestershire

Introduction

Every campaign is designed to bring in a different audience and it's your job as a marketing person to identify what your potential visitors look like and figure out how to reach them. This toolkit sets out how to approach marketing strategically and could be used for an annual marketing plan, a temporary exhibition or a special event.

Effective marketing planning will give you the biggest possible impact from your limited resources and ensures that all your marketing actions stay focussed on meeting your objectives.

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Guiding principles

1. Create your elevator pitch

Imagine you only have a few seconds to excite someone about your activity. It's worth spending some time creating a strong summary that underpins your campaign materials.

2. Know who you're talking to

Your audience influences every aspect of your campaign, from colour palette to advertising channels, so make sure to define exactly who they are.

3. Identify your unique selling point

What is the thing that will encourage potential visitors to book their ticket or step through the door? Think of it in terms of how they personally benefit, such as having fun with family.

4. Be integrated

Marketing can cover a lot of different channels, both physical and digital. All your copy, images, messages and tone should fit together as a whole and follow your brand guidelines.

5. Be clear about your goals

It's not always about visitor numbers – some campaigns increase your profile, attract higher income audiences or engage with local communities. Have easily measurable outcomes.

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Set your goals

Remember to set SMART goals

Specific: Do you want to sell 20% more tickets than last year? Do you want to increase visitor spend by 25%?

Measurable: Do you focus on visitor numbers, ticket sales, feedback score, numbers of group bookings?

Achievable: How far can you realistically reach with your level of budget and staff time?

Realistic: If you have no budget, aiming to double your audience is not realistic, however a 10% uplift may be more in reach.

Time: Have you considered the lead-times for your artwork and advertising deadlines for publications?

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Conduct an audit

- What marketing channels do you already use? Which campaigns have people responded to the most in the past?
- Where do the skills lie in your organisation or team, and who would like to be involved? How can you inspire your own team to excite visitors first-hand?
- Do you already have a network of supporters, such as a mailing list, partnerships with other organisations or the press?
- Is there information in your audience data that can build up a picture of your target audience? What do they look like? **See our Marketing Planning video for more about segmenting your audience.**
- Are there any free opportunities you can take advantage of such as local event listings, partner organisation support, press coverage and social media marketing?

Planning a marketing campaign

These are the tactics you use to attract your audiences, detailing the channels you choose, who you target and where they will find out about you. It's both about building up awareness of your story and a practical guide that covers all the dates, deadlines and costs involved.

Start with your target audiences and build the campaign around them. Where are your potential visitors likely to engage with the message – at home, online, in venue, on the street, in a social media group or in a particular publication? Here are some tactics you may wish to build into your campaign:

Print collateral. Print materials physically get your product onto the street or into people's homes. This can include leaflets, private view cards, signboards and posters. Make sure it's high quality and contains all the right image credits and logos.

Advertising. Adverts could appear in many forms, such as newspapers, what's on guides and social media. It's essential to choose somewhere that will be seen by your target audience.

Social media and online presence. Which channels are best to convey your selling points? **See our Social Media & Digital Marketing video** for more info about making your content memorable and share worthy.

Press and Media. Take advantage of free and independent endorsement of your product via press and radio. Plan your angles and timing very carefully and suggest photo opportunities and interview topics. Building up a dedicated press list can really help to get as much exposure as possible.

Handy hints

- Bear in mind that the same person might see several of these before they decide to visit. Each time they see you appear on a different channel it increases the likelihood they will visit.
- Never forget the power of staff – every point of contact your staff have with visitors is an opportunity to sell.

Museums Worcestershire case study - Pirates, Pants and Wellyphants

Target audience

Pirates, Pants and Wellyphants – the Illustrated World of Nick Sharratt was a colourful, accessible and interactive summer exhibition. It specifically targeted families from Worcester and Worcestershire who were looking for things to do during the long summer holidays and it also aimed to attract brand new visitors, so needed a strong message that this was for them.

Objectives and selling points

The exhibition aimed for increased visitor figures and retail income – particularly to draw a volume of people with spending power. It also needed to show that an imposing Victorian building can be family-friendly, especially to those with families who don't usually visit. The biggest selling points were having a household name, the exhibition's fun and interactive format, free entry and the fact it could be visited repeatedly for the full summer holidays.

Marketing campaign

Print materials were key, with 10,000 colourful fliers put into local newspapers and display units hosted by local libraries, reaching out to the geographic target audience, as well as the banners on the building which shouted family friendly. Posters were sent to schools and a children's private view sent children back to school the next day telling their friends what a fantastic time they had had. A launch event with Nick Sharratt created a buzz and captured the interest of local radio and made it possible to build excitement early through the local press. There was also some paid-for advertising targeting regional family magazines. Everything was highly colourful and visual, with animated gifs, videos and a snapchat filter created for social media, all illustrating how much fun you could have.

Action plan

Short term actions

- **Define your audience and set specific objectives**
Build a picture of your target audience – are you appealing to families, art enthusiasts, more diverse communities? Look at your previous campaigns and set SMART objectives – e.g. grow audience for the same event by 15% this year.
- **Do the groundwork that will underlie the whole campaign**
Write a polished summary that you can use as a basis for press, digital and print content, write a list of all related event and activity information ready for What's On guides and hone your title.
- **Create your deadline schedule**
Make a list of key dates and work back from these to figure out your deadlines, noting who is responsible for each action.

TOP TIP: If you're on a tight budget there are still things you can do such as social media, websites (your own and others) and press releases.

Medium term actions

- **Develop your media materials**
Getting everything designed, finalised and printed can take a while so make sure you give it plenty of time – and don't forget to proofread!
- **Press 'go' on the campaign**
Once the core information is on your website, get your distribution booked, posters up and schedule some posts on social media. Make sure you've considered the appropriate approach for every channel.
- **Tell the press**
You may want to send news releases with different angles for local and national press and if you have a contact then talk to them directly or copy them in.

TOP TIP: Keep an eye on the things you've sent out and published – there may be feedback to respond to or it might really pay to follow up a press release with a call.

Long term actions

- **Be agile**
Your plan isn't set in stone – the best results come from being able to adapt as you go. Boosting a particularly popular social media post, sending out an extra press release when an extra event comes up or making changes thanks to feedback can expand your reach.
- **Celebrate your impact**
Sometimes it's appropriate to put a press release or social media post out at the end of a project – your top advocates will love to celebrate your successes with you.
- **Gather audience feedback and evaluate**
Great analysis of this campaign will make your next marketing plan even better, so gather feedback during the event and reflect your initial objectives when evaluating.

TOP TIP: Don't forget to share your successes with the team, especially acknowledging their role if they helped with the marketing.

Resources & further reading

The instructional video which compliments this toolkit

Digital Marketing & Social Media version of this toolkit

<https://www.theaudienceagency.org/>

Audience Agency's audience segmentation model

Audience Agency's Audience Finder research programme

<https://www.a-m-a.co.uk/welcome/>

Arts Marketing Association JAM magazine (members only)

CultureHive resource hub by the Arts Marketing Association (free)

Evaluation

There are many ways you can evaluate your marketing campaign, including participant numbers, income, visitor spend, advertising value, annual pass or membership sales, digital marketing measures such as web and social media analytics and qualitative measures such as visitor comments, surveys and online feedback.

It's always a good idea to look back at your objectives and make sure that you know whether you met these. This allows you to tie the results into any business objectives that underlined your goals and evaluate your overall success.

A deeper level of research can be done by looking at the Audience Agency's Audience Finder research programme, which helps you understand your existing audiences more.



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