



ACTION STEP: STRATEGY RETREAT

Overview

The Marketing Plan Coordinator will plan the agenda and coordinate logistical details. Everyone will come to the retreat having worked through their homework, which will prepare them for each of the retreat's components.

Process

- **Open in prayer:** Pray for clarity and direction that will connect your church to the people you need to reach.
- **Focus the team:** On how you got to this meeting (your **MARKETING PLAN** process), what you have learned/know (values, vision, perceptions, needs.), and the opportunity you have (to create a strategy that defines the goals/measurable objectives you will use to connect with your target audience).
- **Conduct a S.W.O.T. Analysis:** *(Depending on the size of the group, break the group down into smaller groups of 5 to 8 or conduct it with the entire group.)*

The Marketing Plan Coordinator will reiterate the points about Strategy and S.W.O.T. covered in the homework. He/she will then guide the team through an assessment of your church's strengths, weaknesses, opportunities and threats. He/she will instruct everyone to refer to the process they worked through in their homework, encouraging them to share premeditated insights as well as ones that are sparked by the discussion. At the end of this exercise, the facilitator will bring the group to consensus in selecting the top five or six in each category. Write them into your **MARKETING PLAN**.



Step 3: Deliverable

S.W.O.T. Deliverable

Strengths:

- _____
- _____
- _____
- _____
- _____

Weaknesses:

- _____
- _____
- _____
- _____
- _____

Opportunities:

- _____
- _____
- _____
- _____
- _____

Threats:

- _____
- _____
- _____
- _____
- _____

- **Target Audience:** *(Depending on the size of the group, break the group down into smaller groups of 5 to 8 or conduct it with the entire group.)*

The Marketing Plan Coordinator will reiterate the points about Target Audience in the homework. He/she will ask the group to answer a series of questions that draw a specific picture of what this person looks like, e.g., age, gender, where they work, go to school, live, what keeps them busy, priorities they are focused on, what they do in their free time, etc. He/she will instruct everyone to refer to the process they worked through in their homework, encouraging them to share premeditated insights as well as ones that are sparked by the discussion. At the end, he/she will work toward consensus in defining the target audience. Write the description into your **MARKETING PLAN**.



Step 3: Deliverable

Target Audience Deliverable

1. What is my age? _____
2. What is my gender? _____
3. Where do I work or go to school? _____
4. What is my family situation (single, married, widowed, divorced, with kids, no kids)?

5. Where do I live? _____
6. Where do I shop? _____
7. What do I do for entertainment? _____
8. What is important to me? _____
9. What do I read? _____
10. What do I watch on TV? _____
11. Where do I go on the Internet? _____
12. What would make me happy? _____
13. What do I think about church and/or Christians?

14. What would compel me to attend a church activity or service?

- **Strategic Objective:** *(Depending on the size of the group, break the group down into smaller groups of 5 to 8 or conduct it with the entire group.)*

The Marketing Plan Coordinator will reiterate the points about Strategic Objectives in the homework. He/she will ask the group to brainstorm the Strategic Objectives. At a minimum, these will each have a connection to either a Strength, Weakness, Opportunity or Threat. Ideally, each Strategic Objective will be borne from the combination of more than one.

At the end, he/she will work toward consensus in defining the three to five Strategic Objectives. Write the description into your **MARKETING PLAN**.



Step 3: Deliverable

Strategic Objective Deliverable

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

- **Goals:** *(Depending on the size of the group, break the group down into smaller groups of 5 to 8 or conduct it with the entire group.)*

The Marketing Plan Coordinator will reiterate the points about Goals in the homework. He/she will ask the group to brainstorm about possible goals that take advantage of opportunities from the S.W.O.T. and are directed toward the target audience. He/she will instruct everyone to refer to the process they worked through in their homework, encouraging them to share premeditated insights as well as ones that are sparked by the discussion. At the end, he/she will work toward consensus to create an agreed-upon number of goals. Create a chart listing your goals and measurements and insert it into your **MARKETING PLAN**.



CAUTION!

Step 5 will challenge your church to evaluate the success of its efforts. Be sure to put plans in place that will help you measure the progress toward your goals along the way. For example, if you have set a goal to increase first-time guests, you need to plan to track first-time guests' attendance regularly. Read more about this and see examples in **Steps 4 and 5**.



Step 3: Deliverable

Setting up benchmarks measurements for goals:

Goals –	Method(s): How would you gather initial and then follow-up information?	Person/team responsible for gathering this information	Timing: When will it be completed?
Goal 1	Method(s)	Team(s)	Date(s)
<p>Example #1:</p> <p>To increase our church's attendance of young families in our community by 15% over the next 6 months.</p>	<p>Example #1:</p> <p><u>Initial</u>: Conduct surveys, interviews and gatherings outlined in Step 2: Perceptions and Needs.</p> <p><u>Follow-up</u>: Repeat another local telephone survey or man-on-the-street interviews. (When compared to the initial research conducted, you'll see what change with awareness has occurred.)</p>	<p>Example #1:</p> <p>Marketing Plan Coordinator/Marketing Plan Team (in partnership with a research professional)</p>	<p>Example #1:</p> <p><u>Initial</u>: Before the Marketing Plan launches</p> <p><u>Follow-up</u>: Repeat at the 6-month point</p>

- **Resources:** *(Depending on the size of the group, break the group down into smaller groups of 5 to 8 or conduct it with the entire group.)* The Marketing Plan Coordinator will reiterate the points about Resources in the homework. He/she will ask the group to discuss how resources need to be reorganized or developed in order to achieve the goals. He/she will instruct everyone to refer to the process they worked through in their homework, encouraging them to share premeditated insights as well as ones that are sparked by the discussion. At the end, he/she will work toward consensus to create an agreed-upon allocation of resources.



Step 3: Deliverable

Resources Deliverable

Financial Resources

Overall funds available for the new marketing plan:

\$ _____

Human Resources

Personnel responsible for coordination and execution of your **MARKETING PLAN**:

Facilities

How will you use your facilities to carry out your **MARKETING PLAN**?
