

STEP 4: IMPLEMENTATION

Choosing a Happy Trail



The next step on your MARKETING PLAN

Now that Your Marketing Plan Team has:

- Completed **Step 1: Values & Vision** and has identified your church's:
 - Values
 - Demographics
 - Vision
 - Key Messaging/Elevator Statement
- Completed **Step 2: Perception & Needs** and has identified:
 - Perception
 - Needs
- Completed **Step 3: Strategy** and has identified:
 - S.W.O.T.
 - Target Audience
 - Strategic Objective
 - Goals
 - Resources

It's time to take the fourth step to focus on implementation. This step will help your Marketing Team:

- Brainstorm, plan and implement the specific tactics and tools that will support your church's goals and measurable objectives to reach its target audience.

Step 4: Implementation

Homework

- **Homework 1: Tactics**

Action Steps

- **Action Step 1: Tactics Brainstorming & Prioritizing Session**
- **Action Step 2: Marketing Plan Development & Review**
- **Action Step 3: Marketing Plan Approval & Implementation**

Marketing Plan Deliverables

- Goals/measurable objectives with supporting tactics
- Timing/deadlines
- Person/team coordinating
- Budget information



HOMEWORK *(each Marketing Team member should complete before beginning Action Step)*



How long will it take?

One to 1.5 hours (longer if you chose to do further study).



What will I learn?

During this step, your team will participate in sessions to plan the tactics you will use to meet your **MARKETING PLAN** goals.

Reading through this section and reflecting on work accomplished so far will help you:

- Focus on what the group will be discussing and trying to accomplish during the Tactics Brainstorming and Prioritizing Session.
- Think and be ready to share about potential tactics. As the group comes together there will be “real” ideas to share, and the momentum will build for even more ideas to be discussed.



HOMEWORK: TACTICS

What are tactics?

Tactics are the specific activities, events and/or communications tools your church will organize or create to connect with your target audience(s) and reach the goals you've identified.



Examples of tactics include:

- Sending letters to inactive members
- Launching new e-newsletter to improve communication with members
- Sponsoring youth sports leagues
- Partnering with Meals on Wheels to provide elder care
- Conducting a direct mail campaign with postcards to your local community
- Advertising in your local newspaper
- Hosting a free concert open to the community
- Strengthening your church's welcoming ministries (greeters, ushers, etc.)
- Developing a new brochure and gift for first-time guests to your church
- Updating the church's Web site with specific info for the community/first-time guests
- Joining the local Chamber of Commerce
- Volunteering/serving at a local school

Read/Pray/Brainstorm

- Read the **agenda** for the Team Brainstorming and Prioritizing Session. (You'll receive this from the Marketing Plan Coordinator.)
- Pray for this session.
- Review **your marketing goals and target audience** that you identified in **Step 3: Strategy**.
- Using the list below as a starting point for ideas, brainstorm about tactics and tools your church could use to meet your marketing goals. Write your ideas on the lines below.



Free or inexpensive communications tactics to implement (Less than \$300)

- Web site home page/supporting pages with community friendly and/or first-time guest information
- Other e-communications (blogs, Facebook sites, Twitter, etc.)
- Event- or program-specific e-invite (for church members to send to friends)
- Radio/TV/Internet community calendar announcements (free spots, used at the discretion of the media outlet's decision makers)
- Newspaper/magazine community calendar announcements (free spots, used at the discretion of the media outlet's decision makers)
- Radio/TV/newspaper/magazine/Internet media relations efforts for story/article placements: news releases/story ideas provided to media outlets (used at the discretion of the media outlet's editors/writers)
- Article or ad in church newsletter, if this is sent to an external audience
- Article or ad in church e-newsletter, if this is sent to an external audience
- Church serving opportunities for/in the community (at local schools, hospitals, nursing homes, parks, food pantries, homeless shelters, etc.)
- Word-of-mouth campaign with church members to their friends, neighbors, etc.



Communications tactics within \$300 - \$1,000

- Community newspaper/magazine advertisements – in a small media market
- Grocery carts advertisements
- Exterior signage
- Exterior banners
- Yard signs
- Posters
- Door hangers
- Flyers (distributed by hand)
- Event invite postcards (distributed by hand)
- Car magnets/static clings
- Church events for/in the community
- Church sportswear/apparel/giveaway items (for members to wear/use/give out in the community)
- Church-sponsorship and involvement opportunities at the local school (sporting events, choir concerts, etc.), neighborhood association groups, fairs/festivals, etc.
- Church-membership opportunities at local Chamber of Commerce, Kiwanis, etc.



Communications tactics over \$1,000

- Mass mailing/direct mail into community (postcards)
- Radio/TV/Internet advertisements (small series of ads)
- Newspaper/magazine advertisements – in a medium or large media market
- Billboards
- Significant church events for/in the community (hosting a large community festival, concert, etc.)

To learn more about external tactics – what they are, how to develop them, what you can expect for a return on investment and more – consider the following resources:

- Support/consulting from [United Methodist Communications](#)
- [Rethink Church materials](#)
- [The Blogging Church](#), by Brian Bailey & Terry Storch
- [Church Marketing 101](#), by Richard L. Reising
- [The Public Relations Writer's Handbook](#), by Merry Aronson & Don Spetner



ACTION STEP 1: TACTICS BRAINSTORMING & PRIORITIZING

Overview

In this session, the team will come together to focus on the opportunity and brainstorm a lengthy list of potential tactics/tools/ideas. All ideas and suggestions will be valued in this session! There are no bad or wrong ideas in brainstorming.

Once all possible ideas have been considered, the team will prioritize those ideas into the top priorities and begin defining details for implementation.



How long will it take?

Three to four hours



Why?

- This session will allow the group to develop a lengthy list of potential tactics/tools/ideas to be considered to support the church's efforts to reach its target audience and goals/measurable objectives. Then they'll prioritize that list for implementation.
- The Marketing Plan Team will be more likely to develop strong and strategic tactics because the entire group contributed to the brainstorming and planning process.
- The session will provide significant information to be included in your **MARKETING PLAN**, which will be written/finalized soon after this session.

Preparation

The Marketing Plan Coordinator will:

- Plan the agenda, discussion questions and brainstorming activities for **Action Step 1: Tactics Team Brainstorming Session** and distribute it to each team member for their homework.
- Pray for each team member involved and the brainstorming session
- Confirm each team member's participation and homework prep for the session
- Ensure appropriate space is reserved for the session and planning what supplies are needed: self-stick easel pads, laptop (with Internet access for viewing the Rethink Church info), food/drinks, creative toys like modeling clay and crayons, etc. (see NOTE).
- Reviewing the agenda and making detailed notes about what information he/she wants to share
- Having a plan for the specific brainstorming exercises he/she plans to lead

NOTE to the Marketing Plan Coordinator: *To learn more about planning for this brainstorming session, hosting it in the right space and making it "creative," and conducting brainstorming exercises, see "Brainstorming Resources #1 and #2" at the end of this document. You may decide to provide the brainstorming "rules"/guidelines from Resource #1 to the Marketing Team as they prepare for this session.*

Process

- **Open in prayer (5 min.):** Pray for creativity and fresh ideas that will allow your church to connect with its target audience in strong ways so that more people can know about your church and your Savior.
- **Focus the team (10 min.):** On how you got to this meeting (your **MARKETING PLAN** process), what you have learned/know (our target audience, goals/measurable objectives, etc.), and the opportunity you have (to come up with new or enhanced tactics for connecting with our target audience).
- **Review the Objectives, Goals and Target Audience (5 min.):** Reacquaint yourselves with your Objectives, Goals and Target Audience (identified in **Step 3: Strategy**). As you're brainstorming tactics, continually review this "strategy" and "profile" to help you consider ideas that are relevant to your target audience members.
- **Rethink Church (15 min.):** The United Methodist Church launched this national communications campaign in April 2009. The campaign's messaging and supporting tactics/tools can be viewed at <http://www.rethinkchurch.org/>. As part of this session, discuss if this national campaign – and specifically the "Rethink Church" communications tools – could help raise awareness in our local community about your church and support your own local marketing efforts.

Note to the Marketing Plan Coordinator: *As part of this session, you may want to have a laptop (with Internet access) ready so that you can give a quick preview of the Rethink Church campaign/materials that are available.*

- **Brainstorm/Discussion (30-40 min.):** Facilitator focuses the group on the task at hand. Share something like the following:

"As we brainstorm, think very specifically about objectives and goals and who our target audience is, what keeps them busy, what they are focused on, what they do in their free time, etc. Brainstorm tactics that take these details into account. For example, if we're trying to reach out to families with children, should we consider what we can do in our community to support the organizations where families/kids spend a lot of their time, like Moms Morning Out or Boy Scouts? Let's brainstorm what our church could do to support our local schools, parks/recreation programs or library (and reach the families through these interactions)?"

Facilitator asks participants to refer to their homework. Each person shares their response to the question: What are the tactics/tools/ideas we should consider to meet our objectives/goals and reach our 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.)

- **Additional Ideas (45-60 min.):** Building on the creativity sparked in the last activity, bring the group together (or continue to work in small groups) to discuss additional tactics/tools/ideas. You may consider a role play setting to further spur ideas. Divide the group between people who play your target audience and those who play your church marketing team. Ask the marketing team to interview the target audience to understand



- **Prioritize (30-45 min.):** Facilitator brings the larger group (if applicable) together to report on their ideas.

Facilitator then works to find consensus among the group to prioritize the tactics into the "top 10" (based on which tactics can have the most impact in helping reach the goals/objectives and connecting with the target audience and are in line with the resources your church has available).

Once the group has found consensus around the "top 10" discuss the following:

- **What items must/should we focus on for the short-term (for the next 6 months)?** (Get as specific as possible with the timeline for each item. Consider the church calendar/holidays/major events of the year as you're planning. You'll want to take advantage of both the busy times and quieter times in the life of your church as you're formulating the Marketing Plan.)
- **What might be implemented longer-term (6 mon. to 18 mon. out)?** (Get as specific as possible with the timeline for each item. Again, consider the church calendar/holidays/major events of the year as you're planning.)
- **What are strong ideas we will hold onto for the future (beyond 18 months)?**



STOP & PRIORITIZE!

REALITY CHECK! It would be tempting for the Marketing Plan Team to want to move forward with many of the tactics/tools recently brainstormed. (Why not? They came up with many great ideas throughout this brainstorming process! Right?)

However, the Marketing Plan Coordinator will want to emphasize the importance of prioritizing with this group. Start with a realistic number of tactics (probably about a handful of tactics) that you'll identify as your short-term priorities as part of this process. Focus on those for the coming six months.

Then, move to your longer-term tactics for the next six to 12 or 18 months, as determined through this process. If you move more quickly, the Team can update the Plan and take on more tactics.

This realistic approach will make success more likely and give your Team – and your entire congregation with the community – reasons to celebrate!

- **Launching and communications to the congregation (30 min.):** Discuss as a team when the Marketing Plan efforts should be launched and communicated about to the congregation.

Note to the Marketing Plan Coordinator: To learn more about launching and communicating to the congregation, see the "Launching and Communicating to the Congregation" Resource at the end. You may decide to provide this resource to the Marketing Team before or during this session.



ACTION STEP 2: MARKETING PLAN DEVELOPMENT & REVIEW

Overview

This **Action Step** is the culmination of everything that your team has been working toward. It takes the outcomes from the Tactics session and organizes them into the detailed, ready to implement portion of your **MARKETING PLAN**. The team will have one more opportunity to review and make any final modifications.

Your **MARKETING PLAN** – a living, continually evolving document – will serve as your church’s roadmap both now and into the future to organize, guide and monitor/track your efforts to connect and communicate with your target audience and community.



How long will it take?

- Three to eight hours for the Marketing Plan Coordinator to prepare the chart.
- One to two hours for the team review session.



Why?

- To build a strong **MARKETING PLAN** tool that will be referenced for months/years to come.
- To unify the Marketing Plan Team around a final version of your **MARKETING PLAN** and confirm some details about who will lead the effort to launch the first **MARKETING PLAN** tactics and communicate with the congregation.
- To reinforce each Marketing Plan Team member's understanding of the depth of this work and understand what the church will be involved with moving forward.

Process

Your **MARKETING PLAN Master Planning Chart**

The Marketing Plan Coordinator will review the Goals and Objectives and match each tactic to the goal it is purposed to accomplish.

He/she will then prepare the marketing plan Master Planning Chart (see sample on next page). The chart will include every detail needed to implement the plan, including:

- Objectives
- Target Audience
- The Goal the tactic is working toward.
- The Tactic/Tool/Event
- Timing (key dates/deadlines)
- Lead person or team (Who will implement the tactic?)
- Budget
- Tactic Tracking/Evaluation

NOTE: *Try to organize the information in this chart in order by the date each tactic is due. Then you can follow the chart like a calendar.*

Your MARKETING PLAN Master Planning Chart
Sample 1: Goals/Measurable Objectives/Tactics Chart

Objective	Target Audience	Measureable Objective(s) (supported by this tactic)	Tactic/Tool/Event	Timing (Key dates/deadlines)	Lead person or team	Budget info	Tactic Tracking/Evaluation
Objective 1	Audience 1	Goal	Tactics	Date	Team	Budget	Tracking
Example: Increase church visibility.	Example: Young families in our community	Example: To increase by 30% our church's visibility (awareness) with young families in our community throughout the next 12 months.	Example: Tactic 1 host a booth at the fall festival Tactic 2: Set up mothers' morning out Tactic 3: Provide after school tutoring program Tactic 4: Have UMYF members invite a friend to a pool party	Example: Festival is in Oct. Set up by Labor Day Setup By Aug. 15 th Event date July 15 th	Example: Joe Smith Elaine Wojciekowski Dick Harrison Melissa Honors	Example: \$1,500: \$2,400 \$0 \$100	Example: Track the # of booth visitors # of families served # of students helped # of guests at the party and the # of new enrollees for UMYF

Your MARKETING PLAN Master Planning Chart
Sample 2: Goals/Measurable Objectives/Tactics Chart

Objective	Target Audience	Measureable Objective(s)	Tactic/Tool/Event	Timing (Key dates/	Lead person or team	Budget info	Tactic Tracking/Evaluation
Objective 2	Audience 1	Goal	Tactics	Date	Team	Budget	Tracking
Example: Increase teen participation in UMYF	Example: Teenagers	Example: Increase the number of teenager participation in various activities by 25%	Example: Tactic 1: Launch an internet café lounge Tactic 2: Sponsor teen basketball team Tactic 3: Establish a teen Facebook group Tactic 4: Organize a teen mission trip Tactic 5: Organize evening music coffee house	Example: By the end of Nov. Start in Dec. After completion of 1 st teen oriented event Within 3-4 months Oct.2010	Example: Elliot Nielson Myles Jackson Pearl Smith Claudia Smith Jack Myers	Example: \$500 \$200 \$0 \$1500 (will require fund raising efforts) \$400	Example: # of users # of teens involved # of members #of teens participated, #of people impacted by mission and # of people donated # of attendees

Team Review

The Marketing Coordinator will distribute this chart to every team member, asking him/her to review and make notes for implementation.

The team will then come together for a one to two hour review session to walk through the chart and give final review/consideration for each tactic:

- Potential for impact.
- Feasibility within resources and timeline.



Step 4: Deliverable

The Marketing Plan Coordinator will revise the tactics chart based on the team's feedback, then attach it to your **MARKETING PLAN**



ACTION STEP 3: MARKETING PLAN APPROVAL & IMPLEMENTATION

Overview

It's time to begin using the strong plan you've developed!

It's your church's roadmap both now and into the future to organize, guide and monitor/track your efforts to connect and communicate with your target audience and community.

The Marketing Plan Team has worked hard! And God is going to bless these efforts!

Process

The process for implementing your **MARKETING PLAN** will depend on your church's unique organization and culture. The steps are outlined below. You need to decide who will carry out those steps based on leadership, decision making and staff/laity roles and responsibilities.

Approval/Endorsement

Your **MARKETING PLAN** needs to be approved and official endorsed by church leaders. This process will affirm the Marketing Plan Team's "labor of love" and ensure that the plan is valued and implemented.

Accountable Responsibility

Each person responsible for implementing the plan needs to hear from his/her staff or volunteer "supervisor" that the plan is important and necessary for the church to make an impact. If applicable, accountability for implementation should be included as part of staff members' job descriptions and annual reviews.

Communication

The success of your **MARKETING PLAN** begins with the lead Pastor endorsing it. He/she in association with the marketing coordinator should present it to the congregation. He/she should also share enthusiasm about the plan and anticipation for the impact it will make with the entire congregation.

Implement

Use your **MARKETING PLAN** as a working document. Continually visit the timelines/measurements, evaluating and adapting for ongoing success. (See **Step 5: Evaluation** for more information about evaluation.)

Additional Reading & Resources

Resource: Brainstorming #1

What is brainstorming? What are some tips and guidelines for effective brainstorming?

The brainstorming and creative thinking that you and your team will be encouraged to do in **Action Step 1: Tactics Team Brainstorming Session** can be fun and energizing.

Brainstorming is an individual or group idea-generating activity where people are encouraged to think in a more free and creative manner to come up with solutions to a challenge or opportunity.

Tips and guidelines for effective brainstorming

- **Ideal group size:** A small group of 4-8 people is ideal for a brainstorming session. In this case, you'll be involving your Marketing Plan Team members.
- **Facilitation/capturing all the notes:** The Marketing Coordinator (or someone else designated in the group) should facilitate the Team Brainstorming Time, gently enforce the guidelines listed below, and write down all of the ideas shared. Ideally, self-stick easel pad sheets could be used for writing down all the ideas, so that when a sheet is filled it could be hung in the room for later reference throughout the brainstorming session.
- **Make it comfortable and fun:** As you're planning this session, consider where you'll be brainstorming (a relaxed, comfortable and quiet space is ideal), what food/drinks you may want to offer, and what "creative toys" you want to have on hand. Some items to consider might be modeling clay, paper/crayons/markers, yo-yos, a slinky, etc.
- **Make it purposeful:** Focus the brainstorming team before and/or at the beginning of the session by communicating about the purpose of the brainstorming session and clearly state what the opportunity is (reaching our target audience through new tactics).
- **Brainstorming "rules":** Throughout the brainstorming time, gently, but confidently, enforce these guidelines:
 - Encourage everyone to share all throughout the session. Intentionally ask anyone who is more quiet or reserved to share his/her ideas. (You can even go around the room in a more organized manner to allow everyone to share.)
 - Keep the team positive and focused on generating fresh ideas, as many as possible.
 - Avoid criticizing any ideas, asking questions about how that idea might be accomplished or other negative comments. There are no bad or wrong ideas in brainstorming! If people start to criticize the comments, it puts a significant damper on the session. You want everyone to freely offer their ideas. There's no telling how when a variety of ideas are discussed, more and new ideas are developed.

- Encourage participants to listen to one another and “piggy back” (or add on to) other ideas offered.
- Keep the brainstorming focused on the specific opportunity and purpose for today’s session. (Your session doesn’t need to discuss the church’s leaky roof or the need for a different color of carpet throughout the facility!)
- The brainstorming discussion shouldn’t go too deep into discussing any details. Once an idea is presented, the group doesn’t need to figure out who, what or when this idea would be implemented. That is planning for another time.

Resource: Brainstorming #2

What are some brainstorming activities our Marketing Plan Team can use?

Here are several brainstorming exercises to consider. Plan ahead to use two or maybe three techniques (if time permits and you want to generate more discussion) in the **Action Step**

1: Tactics Team Brainstorming Session.

- **Let's Draw It:** First, ask each person to draw a picture of the opportunity (helping the church connect to your target audience & welcoming more people to your church and Christ) and how this opportunity makes you feel. Then, have each person draw a second picture about how they would feel if this opportunity was met with success. Third, have each person draw how to get from picture #1 to picture #2. After these drawings are complete, go around the room and have every person share about their drawings. What ideas/tactics are shared? Write them down and discuss.
- **Best Practices:** Have each person consider (on their own) how other companies and organizations communicate with them and which of those tactics are really noticeable/motivating/touching, etc. Have team members share. Look for ideas discussed that your church could modify in some way and implement. (You could also mention this Action Step ahead of time and ask group members to bring "show and tell" items (other company's brochures, Web sites, giveaway items, etc.) that would help depict the impact of how these companies communicate.)
- **Yes, and:** Each person brainstorms by adding to what another team member has already said. There is never a "Yes, but this is what I was thinking ..." said during this brainstorming Action Step. Only "Yes, and here is what I would add ..." is allowed. This allows the ideas to keep building on one another.
- **Get Fired:** You ask the group to brainstorm the most outrageous/most noticeable/most expensive tactics they can think of. (Ideas that would get the team "fired" if they were actually implemented.) Then you'll spend some time considering how you could scale down these ideas into strong, doable options.
- **Pass It Around:** Get each person to write a new idea at the top of a piece of paper (or this could be done on self-stick easel pad sheets and hung around the room), and then hand it to the next person to build on (by writing things down). You continue building on the ideas as the papers make their way around the room. Then stop the activity and discuss each sheet of ideas as a group.
- **Small Groups:** The group divides into pairs (or groups of 3). Individuals in each group write down their ideas on index cards or post-it notes. Each pair or threesome organizes/groups these ideas, adds new ones, and then shares with the group.
- **180-degree Thinking:** The team brainstorms the complete opposite of what you would want to accomplish; then you discuss and brainstorm around those "bad" ideas to come up with new thinking and strong tactics.

Resource: Launching and Communicating to the Congregation

Consider conducting a three-week launch within the church. The goal will be to educate and energize members, giving them buy-in and ownership of this new marketing effort and the purpose behind it (to communicate and connect with more people in your community).

Launching & Communications Recommendations:

1. **Staff/Ministry Leaders Communications/Celebration:** As you prepare to go “public” to the congregation about these marketing efforts, be sure all staff and key ministry leaders are aware of this work (and the many ways you’ll need their support to communicate internally and then begin tactics to reach the community). Consider hosting an upbeat/fun lunch, dinner or dessert reception to provide them this information and to celebrate how God is at work in your congregation and community.
2. **Sermon series:** Encourage your lead pastor to conduct a three-week sermon series. The series could explain the need and vision for this new effort, God’s calling for all of us to love our neighbors/reach out, and specific ways that the congregation can get involved and support the effort.
3. **“Unveil” key components from the Marketing Plan to your church (in worship services, in written communications, on the pastor’s blog, etc.):** Communicate to members about your church’s values/vision (“elevator” statement) and highlight exciting tactics from The Plan for reaching out to the community in new and fresh ways. These communications efforts should be done as part of the launch and ongoing for the months/years to come.
4. **Adults:** Build momentum and support throughout Sunday school classes and small groups by providing study materials/lessons that support the sermon series and vision for the Marketing Plan. Have pastors and other key leaders from the Marketing Plan Team visit the various classes and small groups to lead some of these discussions and help answer questions about the church’s new “marketing” effort.
5. **Kids/youth:** Build excitement with the children in your church by including them in this discussion about loving our neighbors and reaching out. During their classes/small groups at church, teach the kids and youth lessons and lead discussions about why we want people to know who we are as a church, why we want to invite friends to church and more.
6. **Families:** Provide families with study materials and discussion questions related to this outreach focus for them to discuss in the car (on the way home from church) or at meal times throughout the week.
7. **Over-communicate about the church’s outreach efforts:** Throughout the launch of these marketing efforts and as the various tactics are being implemented, do your best to over-communicate to the congregation about the church’s efforts. Ask people to get involved and share the results. Give updates in the bulletin, newsletter/e-newsletter, in worship services, your pastor’s preaching/teaching times, on your Web site/blogs and more.
8. **Tell stories:** Keep your ears to the ground. As you hear about success from these efforts (church members being touched in significant ways, community members being reached, etc.), document and tell these stories. Telling stories through video, which can be shown in worship services and then available on the church’s Web site, can be very powerful!

9. **Take time to celebrate:** As the church rallies to support these outreach efforts and as more and more lives are touched, take time to celebrate as a congregation! Host a special celebratory event or serve cake on a Sunday morning. Whatever would be special to your congregation – do it as a means of celebrating, affirming and encouraging for the future!

Additional Resources

- [Rethink Church materials](#)
- [The Blogging Church](#), by Brian Bailey & Terry Storch
- [Church Marketing 101](#), by Richard L. Reising
- [The Public Relations Writer's Handbook](#), by Merry Aronson & Don Spetner