

STEP 5: EVALUATION/ADJUSTMENT

Time For a Tune-up? Or All Systems Go?



The next – and final! – step on your MARKETING PLAN

Your Marketing Plan Team is in the process of implementing a strong marketing plan! As you continue to implement the various tactics from your **MARKETING PLAN**, the Team will want to track and record progress, evaluate results and make adjustments as needed.

Step 5: EVALUATION/ADJUSTMENTS

Evaluation:

- The organized, intentional effort to evaluate the planning, implementation and impact of your **MARKETING PLAN**. Early on in this process your Marketing Plan Team determined specific goals and measurable objectives. Then you developed specific tactics to accomplish these goals and objectives. Now, you'll conduct evaluation to learn what happened and why.

Adjustments:

- This is what you will DO with your evaluation findings. As you evaluate and learn about successes, they should be communicated and celebrated. As you learn of challenges, they should be reviewed. As needed, alterations/revisions can be made to your **MARKETING PLAN** (for future tactics) and/or the Plan's overall objectives and goals.

This step is focused to provide ongoing tracking of your **MARKETING PLAN'S** objectives, goals and tactics – with the Marketing Plan Coordinator, Team and others communicating regularly about progress, successes and challenges.



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



How long will it take?

It's healthy to evaluate and adjust as you go and create a new marketing plan on a yearly basis.



What will I learn about Evaluating and Adjusting?

Marketing isn't a science. Evaluating the overall failure or success of marketing efforts can be difficult particularly in understanding which tactic led to what result. The purpose of evaluation is to track the measurable aspects of your tactics and progress toward overall objectives and goals.

Where to Begin

When marketing efforts are conceived and budgeted, an expected return on investment (ROI) or result should be discussed. The ROI can be set in terms of increased giving resulting from the marketing effort, new members or program enrollments gained, or whatever other measure best suits the church's marketing. After the marketing effort has been completed, the actual ROI should be compared to the expected ROI, and the difference noted.

Success or Failure

Did you achieve your goals? If yes, see if this type of effort can be repeated, either in support of the same marketing goal or another one.

Evaluating a failure is more complex. Was the expected result unrealistic and set too high? Was the marketing effort flawed in execution? Was it reasonable to expect results when you did the measurement? Did it fail to reach the selected target audience?

Only after these tactical matters have been considered should the review turn to the strategic: Was the correct program chosen for marketing? Was the correct demographic targeted? Did we understand our target market's needs? At this point you decide where you go from here with the existing objectives, goals and tactics.

Hidden Positives

Even a marketing effort that falls a bit short of its anticipated outcome can result in lasting positive impressions. If the church's identity has been communicated correctly, you're on the right path in your marketing effort.

Positive results will continue to build over time in the minds of prospective members, reinforcing the church's identity and making it more likely that subsequent marketing efforts will be able to turn seekers into members.

Review

Remember to treat your **MARKETING PLAN** as a living document. You should review your **MARKETING PLAN** on a regular basis. Marketing efforts done in the previous year should be evaluated as should the church's progress in reaching its marketing objectives. If expectations or conditions have changed dramatically since the last review, the church should adjust the marketing plan accordingly.



ACTION STEP 1: ONGOING PLAN MANAGEMENT

Overview

The Marketing Plan Coordinator, with support from the Marketing Plan Team and others, will complete the following Action Steps:

1. Ongoing management of your **MARKETING PLAN'S** overall implementation and progress.
2. Leadership to ensure the goals/measurable objectives and individual tactics are being evaluated (as identified in the Plan).
3. Communicate and celebrate successes.
4. Determine if or when adaptations need to be made to the Plan (for future tactics) and/or original goals/measurable objectives.

Remember, these Action Steps will be **ongoing** once your **MARKETING PLAN** launches.

At times all of these Action Steps may take place simultaneously as different tactics are being implemented, evaluated or modified.

As the Plan is launched and implemented for the long-term, the Marketing Plan Coordinator with support from the Marketing Plan Team and others will monitor the various tactics, upcoming key dates and deadlines, and communicate with the people/teams leading these efforts.

Process

1. Ongoing Marketing Plan Management

The Marketing Plan Coordinator (with support from others) will have his/her "eye" on the big picture as well as the details of your **MARKETING PLAN**.

2. Communications with other leaders/teams

As a larger group of people and teams are empowered to carry out the various tactics of your **MARKETING PLAN**, the Marketing Plan Coordinator (with support from others) will stay in touch with these people to ensure all tactics are ready to be implemented at the designated times.

Through regular phone calls, e-mails and/or meetings with key leaders involved with implementing the Plan and tactics, the Marketing Plan Coordinator will ensure the Plan is on track.



ACTION STEP 2: MEASURE PROGRESS: OBJECTIVES/GOALS/TACTICS

Overview

In **Step 3: Strategy**, the Marketing Plan Team developed goals/measurable objectives defining what your church hopes to achieve through these marketing efforts. **In Step 4: Implementation**, you developed tactics to support the goals/measurable objectives.

In both steps, plans detailed how you would track and evaluate the progress of these items. (For more ideas, see the Tracking & Evaluation Methods Resource at the end.)

In your **MARKETING PLAN** (from **Step 4: Implementation** and also provided at the end), these tracking and evaluation methods were documented. Now in this Action Step, the Marketing Plan Coordinator and others will ensure that each of those evaluation items is completed in a timely manner.

Process

1. Ongoing Evaluation Management

The Marketing Plan Coordinator, with support from others, will closely monitor your **MARKETING PLAN'S** Master Planning Charts to stay current on what tracking and evaluation methods need to be executed and when.

2. Communications with other leaders/teams

The Marketing Plan Coordinator will work with the other leaders/teams for the various tactics to ensure they are making plans to track and evaluate, as needed.



ACTION STEP 3: COMMUNICATE, CELEBRATE SUCCESS

Overview

You will involve many from your congregation in your **MARKETING PLAN'S** efforts. You will communicate and impact many in your community. As you complete your tactics/tools/events and make progress, the Marketing Plan Coordinator and the Team should communicate with the congregation and celebrate.

Process

1. Ongoing "ear-to-the-ground" efforts

Listen for stories about the impact you have created within your congregation and community. Use these stories continuously to keep people motivated.

2. Communicate about success

Progress, information about tactics that were implemented well, and stories about people being touched/impacted should be shared frequently with the congregation.

3. Celebrate successes

At key milestones throughout these efforts (one-year anniversary of the launch, reaching one of your measurable objectives, 1,000th volunteer-hour donated in service to the community, etc.), make a special effort to celebrate this success as a church family. Host a church picnic after Sunday services! Serve cake in the lobby! Give everyone a church T-shirt (to wear the next time they volunteer in the community)!



ACTION STEP 4: ADJUSTING YOUR PLAN

Overview

It's fun to find out about and celebrate the Plan's successes! But the Marketing Plan Coordinator and the Team also need to learn about and follow-up on challenges and barriers. These efforts will be both helpful and healthy as the church moves forward to communicate with and connect to the community.

Process

1. Communications with other leaders/teams

As the Marketing Plan Coordinator and Team continually work to support and stay in touch with the leaders/teams involved (through regular phone calls, e-mails and meetings), it's inevitable that they will learn of various challenges and barriers to this process.

2. Significant or not? And moving on ...

Depending upon how significant the challenge/barrier is, the Marketing Plan Coordinator and Team will make adjustments.

Resource: Tracking & Evaluation Methods

Here is a brief summary of a variety of ways to track and evaluate the progress of a goal, objective or tactic. These are common methods used by churches.

Specific methods include:

- Surveys:
 - [Web-based](#)
 - [E-mail](#)
 - [Telephone](#)
 - Mail
 - In-person/man-on-the-street
- Interviews:
 - Online
 - [Telephone](#)
 - [In-person/man-on-the-street](#)
- Focus groups/community forums/panels
- Media analysis: analysis of mentions about your church in the media
- [Web site analysis](#): analysis of visitors to a Web site, pages viewed, etc.
- Mail/phone/online analysis: analysis of letters, calls, online inquiries
- [Tracking attendance](#)/financial giving/other kinds of numbers
- Tracking attendance and/or comment cards (from services, events, etc.)

Tracking/evaluation tip: To determine how something has changed/progressed throughout time, you'll need to do an initial study (benchmark) and document those results. Then, at a later time (based on your goals/objectives), you'll want to go back and repeat the study and compare/contrast those results to the initial study. You'll see the change (positive or negative) and you can adjust or write new goals/objectives for the future.