



# BSSEC

# resources

## Developing a Social Enterprise - a resource pack

### Part 3 - Creating a marketing strategy and plan

Marketing can play a crucial role in helping you to develop a customer base, a credible image, and long-term sustainability, but there is currently a very weak marketing culture in the social enterprise sector.

This part of the Developing a Social Enterprise resource pack aims to help you to strengthen your marketing and improve its effectiveness by outlining the key information required to put together a successful marketing strategy, which can then inform a marketing plan.

Careful planning will save you time and money in the longer term and will ensure that the marketing materials and activities you do undertake are focused, clearly targeted and appropriate for the audiences for which they are intended. This will also help ensure that marketing is part of your daily business routine and not just an infrequent optional extra.

### Introduction

A successful marketing campaign usually involves the following key stages:

**Creating a marketing strategy** - detailing the audiences you want to reach via your marketing activities (your target markets), what you want to communicate (your key messages), and what you want your marketing to achieve (your business objectives).

**Developing a marketing plan** - identifying each major marketing activity you intend to undertake with specific actions, responsibilities and timing, who will do what, how, and when.

**Delivering your plan** - carrying out the marketing activities you have planned.

**Reviewing success** - identifying what has worked and what hasn't, and taking remedial action if necessary.

This part of the Developing a Social Enterprise Resource pack looks at the first two key stages. Guidance on carrying out marketing activities and reviewing their success can be found in BSSEC's Promoting Your Enterprise resource pack at [www.bssec.org.uk/pye.html](http://www.bssec.org.uk/pye.html).

**"Careful planning will save you time and money in the longer term"**

Developing a Social Enterprise - a resource pack has been produced by Birmingham & Solihull Social Economy Consortium (BSSEC) - a practitioner-led network that supports and promotes the social enterprise sector.

The pack provides guidance and information for those that wish to set up a social enterprise, but have little or no experience of business development. It comprises:

**Part 1 - Are you ready for enterprise?**

**Part 2 - Producing a business plan**

**Part 3 - Creating a marketing strategy and plan**

**Part 4 - Balancing aims and income**

To download the full resource pack, free of charge, go to [www.bssec.org.uk](http://www.bssec.org.uk)

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# Creating a marketing strategy

## Defining your business objectives

Being clear about what you want makes it much easier to work out how to get it, so the starting point for your marketing strategy should be informed discussion about the business objectives you want your enterprise to achieve. Do you want to grow? Gain more customers? Generate more trade income? Attract bigger clients with bigger budgets? Gain sector recognition? Business objectives are rarely static. They change over time and will also differ according to the circumstances your enterprise is operating in.

For this reason a periodic examination aimed at revisiting and 'refreshing' your key business objectives is in itself good practice and can help you plan for and anticipate problems.

Try to be as specific as you can at this stage as your identified objectives will shape your marketing strategy in terms of who you deem to be your target market, what messages are important to them, and how wide a market you need to be aiming towards.

## Defining your target markets

Target markets are the groups – individuals, businesses, institutions, organisations, or communities – that are most likely to use your services or products. It's essential that your marketing activities are carefully tailored to reach, inform and persuade these groups successfully, and so your marketing strategy should outline who your target markets are.

The more you know about your target markets, the better. If you are already trading, you will already have substantial information about your customers in your in-house records, completed transactions, customer feedback forms, and enquiry records. If you are yet to begin trading, you need to find out more about your target markets – your potential customer base – and this can be achieved through initial market research.

When defining your target markets, the basic information you need to gather includes:

- What is the geographical location of your market/s – local, regional, national or international?
- What common attributes do these customers have – age, gender, ethnicity, occupation, etc?
- How does our product/service benefit these markets – what benefits will be most effective in retaining existing customers and persuading new ones that they should choose us rather than another supplier?
- What do these target markets already know about the kind of product/service we offer, and what do they need to know to persuade them to become customers?
- What do customers in our target markets expect of an enterprise offering our products/services?
- What do our customers like most about our enterprise, and what don't they like?

The purpose of collecting this information is to ensure that any marketing activities you conduct are appropriate to the people most likely to use your services and/or products. Your efforts should:

- Capture the attention of your target market
- Persuade customers that your enterprise can meet their needs

**"A periodic examination aimed at revisiting and 'refreshing' your key business objectives is in itself good practice"**

- Be appealing in terms of its style
- Speak in a tone that either reflects that of your target market or speaks to them in a voice that they prefer (eg expert, peer-to-peer, parent to child, etc)
- Be distributed through channels most likely to reach your target market
- Indicate how your target market can access your products/services in a way most convenient to them.

For more information on defining target markets, see part 2 of BSSEC's Promoting Your Enterprise resource pack.

### Clarifying your messages

Essentially marketing is about communicating messages to potential and existing customers, so you need to be clear about what you want to say.

Your strategy should outline what you want your customers to know about your social enterprise. For example, are your services more affordable than those of your competitors? Is your workforce highly experienced, with specialist skills or qualifications? Do you specialise in certain geographical areas? Do your products or services have a USP – a unique selling point that differentiates them from those of your competitors?

Draw up a list of the key messages you want your customers to 'hear' – remembering that these messages need to be relevant to both existing customers that you want to attract back to your enterprise and to new customers in the target markets you have identified. Prioritise these messages in order of those most likely to persuade customers to use your business. These statements will form your key messages, and these messages should be evident in all of your marketing efforts.

### Promoting your values

And of course, you should not forget to promote your social objectives and the social, environmental or community benefits you deliver.

Depending on the target markets you are seeking to influence, your 'added value' – the benefits you deliver as part of achieving your social objectives – can be a powerful persuader. Indeed, for some customers they may well be the determining factor that brings their business to you rather than to a competitor.

The prominence that you give to your social enterprise values needs careful consideration, however. Some markets may be interested primarily in the price, quality and accessibility of the products or services you offer, rather than their social added value. For others, the added value will be key.

But remember too that there is an increasing need to convey your 'social message' in terms that customers can understand and identify with. Avoid sector jargon ("triple bottom-line", "not-for-profit") and be prepared to support your claims of added value with evidence. Many potential customers – especially those responsible for commissioning and purchasing public services – now expect social enterprises to be able to demonstrate the additional social benefits of what they do, and many social enterprises are struggling with this.

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As yet, the use of ‘impact assessment’ techniques – such as social accounting, or Social Return on Investment – is very limited in the sector.

But even if you are not yet at the point at which you can realistically invest in adopting such techniques in your enterprise, it is nonetheless likely that your current service monitoring or reporting will offer information that can be utilised in your marketing. Many social enterprises forget to consider this information, however. You can use it to put together case studies of how and why your services deliver added social value, or to demonstrate how every pound spent with your business creates lasting change for your clients or service-users.

Such ‘social marketing’ is still in its infancy for much of the social enterprise sector but these are the skills that will determine long-term success, especially as the sector becomes more involved in delivering public services.

### **Sending out the right signals**

Once you’ve selected your marketing messages, you should try and ensure that they are reflected in all that you do. For example, if one of your messages is centred around your enterprise’s commitment to saving the environment, then it would be appropriate for you to use marketing techniques with the lowest possible environmental impact.

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## **Developing a marketing plan**

Once your marketing strategy is completed, you can then use it as the foundation of a marketing plan – a detailed description of the marketing activities you will undertake over an identified period of time – usually 12 months.

A marketing plan should also include:

- Budgets – an indication of how much you’re able to spend, in both time and money, on each activity.
- Delivery schedule – planning ahead will make it easier for you to stick to the plan.
- Roles and responsibilities – who will do what?

### **Selecting your marketing activities**

There are a wide range of marketing activities that you can undertake. The trick is to adopt those that best enable you to communicate your priority messages to the target markets you have identified. Activities can be loosely grouped in the following categories:

#### **Advertising**

Paid communication about products, services, events and ideas through non-personal media. This can include newspaper, website, TV and magazine adverts, as well as sponsorship, posters, direct mail, leaflets and brochures, and banner ads.

#### **Personal selling**

Persuasive communication - either face-to-face or via telephone - between a representative of a product and/or service and one or more prospective customers.

#### **Sales promotions**

Incentives and activities, such as competitions or discounts, designed to encourage the purchase of a product or service.

#### **Public relations (PR)**

The function of managing communication



between an enterprise and its target markets – as well as the general public - to create a positive perception of the company and its services. Commonly, PR activities seek to gain publicity in the form of unpaid communication in the media.

### **New media**

New media is the term used for interactive digital media, such as promotional websites and CD-Roms. There is also a growing number of additional new media marketing tools that social enterprises can use for free, or at relatively low-cost, to reach a much wider range of people. Social networking sites such as facebook.com, myspace.com, and twitter.com can be used to create a dialogue between your business and its customers or potential customers. Sites such as youtube.com and podcast.com enable users to share video and audio broadcasts, and simple blogging software can also be used to publish online journals with a marketing focus.

UnLtd also offers UnLtdWorld, a specialist social networking website specifically for social entrepreneurs. A West Midlands portal to the site is now available, creating new ways for social entrepreneurs to connect, share and exchange information, and inter-trade: [www.unltdworld.com](http://www.unltdworld.com).

Your marketing strategy should outline what activities you intend to undertake. Most successful marketing strategies include a mix of activities – often at least activity from each of the above categories.

When deciding on your activities, you should also look at what marketing actions your competitors use to see what works, and what doesn't. You may also see some great ideas that you can adapt.

### **Monitoring your activities**

You should also incorporate a monitoring process into the plan, so that you can record what each marketing activity is intended to achieve and the extent to which it is successful. This will help you with the final

marketing stage – reviewing success – and enable you to see how your plan is performing in practice, and help you fine-tune your future marketing.

## **Get help and support**

Remember - you don't have to do this alone. There are a number of organisations that can help you and this help and expertise is often free.

Business advisors and support agencies can help with feasibility and market research, business planning and financial projections, specialist training, and getting started.

### **The Social Enterprise Hub Birmingham**

A free support and development service specifically for social enterprises. If you plan to set up a social enterprise in Birmingham then the Social Enterprise Hub may be able to help.

It draws together expertise from a number of specialist providers to ensure that you can receive free business support of the highest quality, tailored specifically to the needs of social enterprises.

For new-start enterprises, it has a comprehensive support and development package to help you every step of the way - right from the germ of a business idea, to registering the business and starting to trade.

**Contact: David Lane, Programme Manager,  
[David.lane@i-se.co.uk](mailto:David.lane@i-se.co.uk) or call 0121 771 1411**

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### **Business Link West Midlands**

Business Link West Midlands is the business support service for the region and should be regarded as the first stop for anyone seeking social enterprise support.

The organisation offers impartial and expert information, support and advice to help individuals interested in starting their own social enterprise and established businesses looking to boost income generation.

**Contact: 0845 113 1234**  
**info@businesslinkwm.co.uk**

### **UnLtd Millennium Awards**

UnLtd is a charity which supports social entrepreneurs - people with vision, drive, commitment and passion who want to change the world for the better.

UnLtd provides a complete package of funding and support, to help these individuals make their ideas a reality. There are two award levels: level 1 - up to £5,000; and level 2 - up to £15,000. To find out if you might be eligible for UnLtd's support - which in addition to financial support also includes ongoing mentoring and business support - visit [www.unltd.org.uk](http://www.unltd.org.uk) or contact the Birmingham office: **0121 766 4570** or email **TonyClabby@unltd.org.uk**

## **Further reading**

### **Marketing Your Social Enterprise**

A guide published by Social Enterprise London that aims to give an insight into what marketing is, why it must be considered as part of organisational planning and how it can achieve maximum results for modest efforts.

**Available from [www.sel.org.uk](http://www.sel.org.uk), priced £10.00**

### **National Statistics Online**

The site features statistical information on Britain's economy, population and society at national and local level. Summaries and detailed data releases are published free of charge.

**[www.statistics.gov.uk](http://www.statistics.gov.uk)**

### **Mintel**

Mintel publishes over 45 reports each month, covering a wide range of sectors and focusing on topical marketing issues. The reports analyse market sizes and trends, market segmentation, and consumer attitudes and purchasing habits, as well as assessing the future of the market.

**[www.mintel.com](http://www.mintel.com)**

### **Birmingham Economy**

A website that provides a wide range of information covering all aspects of Birmingham's Economy including statistics and key facts on economic strategy, trends and forecasting, the local labour market and small area profiles.

**[www.birminghameconomy.org.uk](http://www.birminghameconomy.org.uk)**

### **UpMyStreet**

This website has been designed to cater to the needs of people looking to buy homes in areas which they are new to, however, by entering in the postcode of the areas in which you operate you can find out statistical information relevant to your local area.

For example, did you know that 22% of the population in Birmingham is aged between 20 and 34?

**[www.upmystreet.co.uk](http://www.upmystreet.co.uk)**