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Membership Marketing Campaign Template

**Project Name:**

**Date:**

# Planning Overview and Definitions

Prior to the start of any campaign, it’s important to sit with all project stakeholders and agree on the items below. This will be the baseline for the membership marketing campaign plan.

*[Items in brackets are for example purposes only]*

## Goal

Why are we doing this? There should be only one primary goal.   
*[Ex. "We need to increase member retention by 5%."]*

## Audiences

Who are we trying to reach with this campaign? Include demographic information, how they typically interact with our association, what they care about, what challenges they face, etc.   
*[Ex. Current members. Tend to be 40 - 75. Primarily female. Care about our continuing education opportunities. They are primarily online via their phones. They do not watch much TV.]*

## Strategies

What will we do to reach the goal and audience? There can be multiple strategies focused on the same goal.   
*[Ex: We will implement a Get to Know Us series (with emails, direct mail, and outbound calls) for new members and maintain an editorial calendar for current members.]*

## Metrics

How will we know we have succeeded? Define what success means in terms of numbers, engagement, and/or data.   
*[Ex: The "Get to Know Us" series for new members will have a 50% open rate and a 25% click-through rate. Our member retention rate will be measured by the % of members who renew within 30 days of their renewal date.]*

## Risk

What risks are associated with our objectives, both internal and external?  
*[Ex. We may see our unsubscribe rate increase for certain types of outreach if we email people more often.]*

## Timeframe

How long is the campaign expected to last?  
*[Ex. The "Get to Know Us" series will run for one month on an automated schedule as new members sign up. The editorial calendar will be built out for a year at the start of each calendar year.]*

## Opportunities

What new ideas haven’t been tried in the past?  
*[Ex. We have never tried using animated gifs in our emails.]*

# Campaign Plan Logistics

What—and how much—we will create to reach our audience(s) via each channel.

Email Communication:

Website:

Social Media:

Direct Mail/Print Media:

Additional Communication Channels:

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# Schedule

Create a communications schedule that gives all stakeholders insight into the plan and keeps the association top of mind for your membership. Here’s what a communications schedule might look like.

**Week 1, Month, Year**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Monday | Tuesday | Wed. | Thurs. | Friday | Saturday | Sunday |
| Email #1  Time  Audience |  | Social (AM) |  | Social (PM) |  | Social (AM) |

**Week 2, Month, Year**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Monday | Tuesday | Wed. | Thurs. | Friday | Saturday | Sunday |
|  | Email #2  Time  Audience | Social (PM) | Newsletter |  | Social (AM) |  |

**Week 3, Month, Year**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Monday | Tuesday | Wed. | Thurs. | Friday | Saturday | Sunday |
| Social (PM) |  | Social (AM) | Email #3  Time  Audience | Social (AM) |  |  |

