

Membership Marketing Plan Template
Organization Name
Date
Created by: [Include Name]

A. Plan Objective

Include a description of your organization's mission, your primary target market, and the overall objective of your plan.

B. Background/Situation Analysis

This section should include background that helps the reader understand the current situation, include the results of any market research and a strengths, weaknesses, opportunities, and threats (SWOT) analysis.

C. Recruitment Objectives

What are you hoping to achieve through your recruitment campaigns? Goals should be S.M.A.R.T. (specific, measurable, actional, relevant, time-bound).

D. Recruitment Strategy

Remember, a strategy is different from tactics. This section should include your overarching plan or set of goals. Tactics are the specific actions or steps you undertake to accomplish your strategy (those should be listed down in the Specific and Actionable Recommendations section).

E. Retention Objectives

What are you hoping to achieve through your retention campaigns? Goals should be S.M.A.R.T. (specific, measurable, actional, relevant, time-bound).

F. Retention Strategy

Remember, a strategy is different from tactics. This section should include your overarching plan or set of goals. Tactics are the specific actions or steps you undertake to accomplish your strategy.

G. Audiences

Which audience segments will you reach with your recruitment and retention campaigns? Who do you want to reach? Be specific about audience segments and the source of the prospect lists. Remember, some your best prospects are your current customers (e.g., people who have attended an event, purchased a product or service; etc.).

H. Recruitment Campaign Messaging

What is the value proposition of your organization? Why should prospects join? Why should members stay? Define core messaging for campaigns around that value proposition and include those succinct messages here.

I. Specific and Actionable Recommendations

Tactics are the specific actions or steps you will undertake to accomplish your strategies. Describe them in detail here.

J. Evaluation

How will your campaign success be determined? Things like prospect-to-member and prospect-to-customer conversion rates, email opens and click throughs, visits to landing pages; etc. are some of the metrics you will consider to create campaign benchmarks and measure success.

K. Timeline and Budget

Include proposed (general) timelines for campaigns and budgets for your campaigns. You may not be sure about the best timeframe to deploy campaigns – but that’s where testing comes in. Don’t be afraid to try different timeframes and note which works best for your organization.