

<b>STATEMENT of POLICY and PROCEDURE</b>			
Manual:	O'Keefe Ranch and Interior Heritage Society	OKR No.	<b>6.01</b>
Section:	Marketing	Approved	June 14, 2018
Subject:	<b>Marketing Strategy, Planning and Tools</b>	Amended:	
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## **1 POLICY**

- 1.01 O'Keefe Ranch and Interior Heritage Society will develop strategies and a plan for the marketing of the organization and any products or events we choose to offer for sale.

To the extent possible, marketing strategy and plans will be supported by market research. All research data will be collected, compiled and stored in a manner that is consistent with national and provincial privacy legislation.

## **2 PURPOSE**

- 2.01 The purpose of this Statement of Policy and Procedure is to ensure that the overall business strategy is effectively supported by marketing activities.

## **3 SCOPE**

- 3.01 This policy applies to membership services, communications, fund development and any products and services distributed by the organization.

## **4 RESPONSIBILITY**

- 4.01 Operations Director is responsible for:
- Identifying the types and extent of research required that supports the business strategy
  - Reviewing and approving marketing plans
- 4.02 Finance Director in collaboration with the Events staff and Committee are responsible for:
- Obtaining relevant research information
  - Tracking and reporting progress against marketing objectives
  - Ensuring that changes to the business environment are reflected in revised plans

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## **5      DEFINANCE DIRECTORITIONS**

- 5.01      **"Business strategy"** means an overall direction for the organization designed to enhance its success.
- 5.02      **"Market Research"** means the planning, collection and analysis of data relevant to marketing decision-making.
- 5.03      **"Marketing"** means the process of planning and executing the development, pricing, promotion and distribution of goods, services, social causes, programs or the organization itself, as appropriate, to help the organization achieve its objectives.

## **6      REFERENCES and RELATED STATEMENTS of POLICY and PROCEDURE**

- OKR 1.05 – Legal and Regulatory
- OKR 1.08 – Confidentiality and Privacy
- OKR 2.01 – Board of Directors
- OKR 2.06 – Strategic and Business Planning
- OKR 6.02 – Social Marketing
- OKR 6.03 – Fund Development
- OKR 6.04 – Membership
- OKR 6.05 – Marketing Compliance
- OKR 6.06 – Websites and Social Media

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## **7 PROCEDURES**

### **7.01 Marketing Plan**

- (a) The marketing plan, based upon the overall business strategy, will be developed and updated annually.
- (b) The marketing plan shall be developed collaboratively for each major target market by the department heads involved in donor, member and public relations, fund development, member services, product sales and communications. It will address the following topics:
  - (i) Identification of the needs and desires of present and potential donors.
  - (ii) Identification of the needs and desires of present and potential members.
  - (iii) Identification of the needs and desires of present and potential clients.
  - (iv) Articulation of the desired actions the organization wishes to elicit from each major target market.
  - (v) Articulation of the measurable objectives (key dates, milestones and tasks required) the organization will adopt to elicit the desired actions from each target market.
  - (vi) Details of the main distribution and communications channels that will be used to reach each target market [and where applicable, pricing tactics].
  - (vii) Details of the pricing strategies and structures that will be used for memberships, donations, services and product sales.
  - (viii) Articulation of tracking mechanisms that will be used to measure success against the plan.
  - (ix) Budget and resources required to deliver the marketing plan, and in which departments these resources should reside.
- (c) In preparation for each planning cycle,
  - (i) Overall business strategies will be reviewed for marketing implications.
  - (ii) Required research about the characteristics of each target market will be identified.
  - (iii) Success rates and tracking data from previous marketing plans will be reviewed and discussed for continued applicability.
- (d) The marketing plan shall be reviewed and approved by [the CEO].
- (e) Upon approval, the marketing plan shall be communicated to the involved staff within the organization and folded into their performance objectives.

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**7.02 Research**

- (a) Required market research data shall be collected and analyzed as required to support the plan and strategy.
- (b) All customer data collected shall be in accordance with national and provincial privacy legislation.

**7.03 Corporate Image Strategy**

- (a) The Marketing Plan will identify and articulate the overall corporate image the organization wishes to maintain, ensuring that the image is consistent with the characteristics of each target market and developing tactics where any potential dissonance is identified.

**7.04 Pricing Strategy**

- (a) Where it is expected that donations, membership fees, participant fees or payment for products or fees for services will be transacted, pricing strategy and structures will be articulated and approved as part of the Marketing Strategy. The strategy should identify the following:
  - (i) A sense of what the market will bear and what effect changes in pricing will have on participation or demand.
  - (ii) Segmented pricing or fee structures where the target market will be segmented (e.g., platinum donors, full-service membership, user-pay services).
  - (iii) Product and service pricing, mark-ups, volume discounts, returns/exchange policy.