



Optimist International STRATEGIC MARKETING PLAN

Optimist International Strategic Plan Annex A

December 6, 2008



Goals – Framework of Plan:

- # Goal 1: Define scope of “**marketing**”
 - # Goal 2: Define Optimist **customers**
 - # Goal 3: Define the Optimist **product** to be marketed
 - # Goal 4: Define the Optimist **delivery system** i.e. how do we take our “product” to market
 - # Goal 5: Develop a pragmatic approach to successfully build **new Optimist Clubs**
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Goals (continued)

- # Goal 6: Implement system to retain and grow **membership**
 - # Goal 7: Develop a comprehensive **promotional program** for Optimist Clubs, Districts and the International organization
 - # Goal 8: Develop, promote and support Club, Regional and International **marketing initiatives**
 - # Goal 9: Develop and implement targeted marketing plan to gain support from **corporate sponsors**
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Goal 1: Define scope of “Marketing”

Objectives:

- a. Define and develop key marketing considerations for the International organization and Optimist Clubs at the local level.
 - b. Recognize that **marketing is the unifying umbrella** inclusive of defining customers, products/services, promotional strategies and connecting to various growth initiatives for the organization.
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Goal 2: Define Optimist Customers

Objectives:

- a. Specify potential Optimist “**customers**”
- b. Develop a **unique selling proposition/** value proposition for each of the organization’s “customers”
- c. Determine a **promotional and marketing strategy** for each customer segment * (assigned)



Goal 2, Objectives A and B

Customers and Unique Selling Props

- # 1. Existing Members
- # 2. Potential Members
- # 3. New Communities – New Club Opportunities
- # 4. Corporate Sponsors
- # 5. Endorsed Organizations
- # 6. College Clubs (existing and new)
- # 7. JOOI Clubs (target for future adult Members)
- # 8. Other Civic Organizations

➤ Note: The **ultimate “customer” = the children**
as the beneficiary of our products / services

Goal 2, Objective C *

Marketing Strategy for Each Customer

Staff and Committees to Develop Promotional and Marketing Strategies as follows:

1. Existing Members -- *Membership / Leadership Development / Programs*
2. Potential Members – *Membership / Programs*
 - Members in Optimist Clubs
 - Friends of Optimist / At-Large Members
3. New Clubs / New Communities – *NCB / Programs*
4. Corporate Sponsors – *Marketing / Finance / Programs / Convention / OIJGC*
5. Endorsed Organizations - *Programs*
6. College Clubs – *College Clubs / New Club Building / Membership / JOOI*
7. JOOI Clubs – *JOOI / College Clubs / New Club Building / Membership*
8. Other Civic organizations (i.e. Lions, Rotary, Kiwanis, Jaycees) – *Marketing / Programs / Membership*

Notes:

- *Consider connections / cross-sharing and “exit surveys” for JOOI and College Clubs to transition to “next level” of club membership.*
- *Leverage potential of new programs to drive growth (i.e. iKeepSafe).*

Existing Members - Unique Selling Proposition:

- # Your Optimist Club provides you the opportunity to:
 - Make a difference in a child's life and your community
 - Make new friends
 - Develop networks
 - Feel good about the difference you make
 - Grow personally through local Optimist programs and projects
 - Have involvement and leadership beyond your local Club



Potential Members – Unique Selling Proposition:

- # Optimist Clubs can provide you:
 - Opportunity to make a difference in a child's life and in your community
 - Chance to be involved/ associated with a group (cause/project) with common interests/values/purpose
 - Opportunity to network
 - Chance for personal / leadership development
 - Ability to volunteer in projects tailored to the unique needs of the local community, and covered by liability insurance provided by the International organization



New Communities/New Clubs – Unique Selling Proposition:

Target both to the “community” level and to the 25+ individual members. A new Optimist club can:

- Address a need for young people in your community
- Utilize a number of existing assets, like programs
- Be covered by liability insurance for program participation
- Take advantage of support provided at the Zone, District and International levels
- See USP for “potential members”



Corporate Sponsors – Unique Selling Proposition:



- # Benefits to association with Optimist International:
 - Allows them to reach their target market (which is either a match or not with our membership)
 - Allows them to satisfy community service / corporate social responsibility requirements
 - Allows them the opportunity to sell their product or service
 - Provides name recognition to a wider market
- # Optimist Clubs and OI can deliver the _____ you are looking for.
- # This “blank” could be a membership base (adult Clubs or JOOI/College Clubs) as potential customers (demographics), an image you want to be associated with, reach, or an affinity with Optimist programs/projects.

Endorsed Organizations – Unique Selling Proposition:

Benefits to partnering with Optimist International:

- Opportunity to reach their target market
- Name recognition
- Access to a broader audience
- Share “like” culture/objectives
- Promotion for the organization –
ex. convention booth and workshop



Optimist Clubs and OI can offer:

- Membership base and demographics (adult Clubs or JOOI/College Clubs) that can provide manpower and numbers,
- Image you want to be associated with
- Projects and programs that align to goals similar to those of your organization



College Clubs – existing and new - Unique Selling Proposition:

- # A College Optimist Club can provide:
 - Opportunity for networking and socialization
 - Chance to make a difference and participate in hands-on kid-focused activities
 - Significant opportunities to develop leadership skills (and resume).



JOOI Members – Unique Selling Proposition

JOOI clubs provide :

- Opportunities for networking and socialization as well as a sense of belonging
- Chance to fulfill community service requirement in school curriculum
- Leadership development opportunities – local, District and International
- Clubs from Alpha to Junior Optimists to Octagon, allowing students of varying ages to interact with their peers (and allow “growth path” for individuals)
- Scholarship opportunities
- Organization endorsed by NASSP

A unique and significant opportunity to develop youth leadership skills while providing community service focused on kids with nonrestrictive membership



Other Civic Organizations – Unique Selling Proposition

Partnership with Optimist Clubs can provide:

- Opportunities for mutual benefit in community impact, publicity, sponsorship and membership (internationally and locally)
 - Examples: Lions, Rotary, Kiwanis, Jaycees
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Goal 3: Define the Optimist Product to be marketed

■ Objectives:

- a. Develop profile and positioning of “**who we are**” - our Optimist membership base (inclusive of adult Clubs, **College Clubs** and JOOI Clubs) *

■ Strategies: *

1. Conduct Research & Development Committee Optimist Member and Leader surveys and compile results into demographic profiles. (July – December 2008). Develop profile and trend analysis for adult Optimist Club membership (1988-1998-2008).
2. Compile information regarding College Optimist Club membership and demographics.
3. Compile information about JOOI membership and demographics.
4. Utilizing Member data, develop a demographic profile for adult, **College** and JOOI membership bases and position relative to Optimist “customers.”
5. Conduct ongoing research via demographics in President’s Pride report.



Goal 3: Define the Optimist Product to be marketed (cont'd)

■ Objectives:

- b. Develop a profile of our product defined as **“what we do”**



- Strategies:

1. Develop statistical analysis of the participation by Clubs and Districts in the Optimist programs and community activities (President's Pride Report, surveys, testimonials, etc).
2. Utilize data to develop key positioning statements, re: what we do for various Optimist “customers.”

- c. Determine and develop a “niche, impactful project” to unify and identify Optimist Clubs and assist in marketing to potential members, partners, sponsors and new Club opportunities.



- d. Evaluate current Optimist values, mission, purposes and logo

Goal 4: Define the Optimist **Delivery System** i.e. how we take our product to market

Objectives:

- a. Determine the current Optimist delivery system (i.e. Optimist Clubs).
- b. Refine and recommend changes as needed.
 - Strategies:
 - 1. Evaluate and make recommendations in collaboration with the Membership, NCB, Activities and Governance Committees.
 - Utilize the Research & Development Committee to compile market insights (external trends and data) and Member and Leaders surveys to inform recommendations.



Goal 5: Develop a **proactive, systematic *** approach to successfully build **New Optimist Clubs**

Objectives:

- a. Develop profile for key target demographics as foundation for New Club building strategy

Strategies:

1. Utilize Optimist Club demographics and secondary research to profile candidates for growth / new clubs around “traditional Optimist Club model” and typical demographics (age 45+)
2. Identify and profile potential Optimist Clubs built around a single project or focus (i.e. sports clubs)
3. Utilize research and input from College Clubs and JOOI to profile prospects and possible new club models targeted to younger prospects (age 25-45)
4. In addition to secondary research, conduct primary research via online survey / focus groups targeting college club members

- b. Develop targeting and New Club lead generation plan for each audience based on research and profile

Strategies:

1. Traditional clubs / age 45+ - potential targets for lead generation:
 - AARP – convention, magazine, member list/database
 - Retirement communities – identify locations
 - Associations / memberships – identify candidates
 - School related contacts (school administrators, etc)
2. Project/single-focus clubs – opportunities to convert to Optimist Clubs (i.e. sports clubs attracted by value of liability insurance)
 - Pop Warner leagues
 - Others?
3. Younger target audience (25-45 age) – need to define targeting / lead generation strategy based on research yet to be done

Goal 5: Develop a **proactive, systematic *** approach to successfully build **New Optimist Clubs**

Objectives: (cont'd)

C. Develop lead follow-up plan and network of “sellers” (“swat team”) for the New Club Building prospects

Strategies:

1. Leads from Optimist website and other lead generation efforts go to NCB staff for distribution to Optimist “sellers” / swat team
2. Optimist NCB “swat team” follows up on leads
 - Traditional clubs – CCB / BOE
 - Single project clubs – specialized CCB / BOE
 - Younger club prospects – To be determined
3. Ensure follow-up to NCB team for prospects – staff, Governors, District NCB Chair
4. Closed loop process... outcome on leads to be managed by staff and NCB Committee with NCB “sellers” and Districts.
- d. Develop and distribute to Governors-Elect NCB data and insights on current club locations and opportunities for new clubs, as well as history of club sponsors and BOEs in the District as network of builders. Determine locations where Optimist Clubs are needed to meet the needs of the community.

Goal 6: Implement system to retain and grow **Membership**

Objectives:

- a. Develop strategies for successful Club **recruitment**

- **Strategies: ***

1. **Develop and provide “best practices” to clubs for effective targeting and recruitment of new members**
2. Encourage use of Just Ask program by Clubs and Districts.
3. Encourage use of Guest Registry at all Club events and follow-up by Club Membership Chair.
4. Encourage use of NOW events by Clubs
5. Encourage use of Friend of Optimism program
6. Leverage use of Club Marketing/PR Kit for recruitment.



Goal 6 – Retain & grow membership (continued)

- B. Develop strategies for **minimizing loss** of membership.

- Strategies: *

- 1. Provide and encourage use of Club survey to ensure Members' needs are being met. Ex. Club rejuvenation survey
- 2. Train Club Presidents in Member participation. Ex. give them tools to engage Members

- * Note: Deleted idea of exit interviews upon deletion due to practicality.



C. Provide models and best practices for effective internal and external Club **communications** (e.g. newsletters, websites, e-mails).

Goal 7: Develop a comprehensive **Promotional Program** for Clubs, Districts and the International organization

Objectives:

- a. Provide “**how-to**” **education** to help Clubs utilize promotional materials effectively.

- Strategies:



- 1. Develop Club Marketing/PR Kit to provide Clubs with available marketing materials and “how-to” instructions.
 - 2. Provide training and workshops on marketing at the International convention.
 - 3. Include marketing in the Governor-Elect training session.
 - 4. Identify alternate means of educational delivery. Ex. webcasts, new software tools
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Goal 7 – Promotional program (continued)

- **b. Improve awareness** of existing resources and materials.

- Strategies:

- 1. Utilize all available awareness vehicles, including the magazine, website, Executive Update, District PR Chairs.
- 2. Define available Spanish-language materials and promote where appropriate. Ex. Spanish website



Goal 7 – Promotional program (continued)

- c. Develop **additional marketing materials and initiatives** for use in increasing awareness of Optimist Clubs, activities and the Optimist International organization.

- Strategies:

- 1. Marketing materials will be developed and included on Optimist website and in the Club Marketing/PR kit.
- 2. Develop and communicate “how to” and importance of maintaining a Optimist Club website. *
- 3. Increase profile of marketing on the Optimist website.
 - A. Highlight marketing materials and improve navigation to increase visibility and encourage use.
 - B. Better leverage Optimist website as a marketing tool/vehicle to perspective Members.



Goal 7 – Promotional program (continued)

- 4. Explore possibility of Optimist musical image (jingle).
Consider a “contest” promoted via the Web.
- 5. Promote Optimist through partnerships with **Endorsed Organizations, with Programs Committee.**
 - Strategies:
 - Announce partnership through press releases to major media.
 - Encourage Endorsed Organizations to issue press releases.
 - Submit articles for inclusion in Endorsed Organizations’ publications.
 - Request inclusion on the Endorsed Organizations’ website or in promotional materials.
 - Investigate opportunities of displaying at Endorsed Organizations’ national meetings or conventions.



Goal 7 – Promotional program (continued)

- 6. Develop a **recognition program for non-Optimist(s)** that have achieved world-class performance.

- Strategies / Considerations:

- Develop criteria and process
- Determine funding for award program
- Evaluate potential role of Clubs / Districts / International organization (i.e. **Committee recommends ability for clubs to nominate individual, organizations or business which represents and exemplifies the Optimist mission, and ideally, may even have some Optimist connection.**)
- Determine judging committee
- Consider potential role for corporate sponsors and other recognition.



- **Note: Committee deleted Goal previously in OI Strategic Plan and Strategic Marketing Plan regarding “Establish a **celebrity spokesperson** for Optimist International.” Rationale:**

- Committee does not recommend celebrity spokesperson (difficulty of finding high-profile celebrity who fits desired profile and sees mutual benefit vs risks to align / equate ourselves with an individual)
- **Alternative “new” Strategy 7:** Secure “**testimonials**” and **references** from celebrities who have participated in Optimist projects over the years (i.e. OIJGC, Oratorical contests, etc). – using archived photos, quotes, as well as any new reference quotes we can attain. Focus on celebrities as “testimonials” rather than as “spokesperson.” Greater feasibility and potentially broader appeal.

Goal 8: Develop, promote and support Club, Regional and International marketing initiatives.

Strategies:

- 1. Research grants available from outside sponsors and organizations.
- 2. Research development of grant program for Club marketing.
- 3. Note: Additional strategies to consider adopting / executing from OI Strategic Plan:
 - Establish a grant program to enable grassroots Club marketing participation utilizing local clubs with pre-existing plans.
 - Continue and enhance a resource library on the web of “Best Practices” marketing programs of both Clubs and Districts.
 - Conduct training on marketing. (Completed July 08 and on-going).
 - Optimist International to foster planning and strategy of a youth event to draw world attention and global participation through JOOI.
 - Districts may assist Clubs in developing marketing initiatives.



Goal 9 – Corporate Sponsors

- # Develop and implement targeted marketing plan to gain support from corporate sponsors.



Call to Action

- # Motion: Approve revised Strategic Marketing Plan, as presented.
 - # Shift to additional Board Motions and Information
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