

Advancing Microfinance through
Association Leadership

**BUILDING STRONG
ASSOCIATIONS**



Managing Your Association's Brand: The Strategic Importance of Integrated Marketing Communications

2010

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Managing Your Association's Brand: The Strategic Importance of Integrated Marketing Communications

The SEEP Network

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Citi Foundation



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ProDesarrollo – Mexico

Azerbaijan Microfinance Association (AMFA)

The SEEP Network

Introduction to Branding and Integrated Marketing Communications

A business plan is a critical cornerstone to any organization's success. This is generally an accepted rule of thumb. For microfinance associations, this means thoroughly understanding your market, knowing the products and services that are in demand, and having the means to deliver them.

But what happens after the business plan is drawn up? Having a product or service defined, priced, and ready for the customer is just the beginning. Understanding how to sell the product or service, manage your reputation, and strengthen relationships with your members and other stakeholders are crucial next steps.

Accomplishing these last steps takes time and starts with a strong and consistent brand, supported by an integrated marketing and communications (IMC) strategy.

"You must have mindshare before you can have marketshare."
—Anonymous

This technical note begins to explore the strategic importance of branding and marketing communications for microfinance associations. It emphasizes that a brand is more than a logo; it represents what your organization stands for. It is about how stakeholders perceive you. It is your reputation. Having a strong brand is not exclusive to the private sector. In fact, it could be argued that it is even more important in a mission-oriented sector, where organizations are not selling a single product, but rather are selling intellectual capital, leadership, and perspectives. This is particularly the case for microfinance associations, whose credibility is based not just on the quality of their services but their ability to generate and promote ideas that influence the development of the microfinance sector.

Whether your association's goals are to increase membership, shape regional policies, or facilitate sector-wide learning, a strong and consistent brand will help establish the credibility and reputation required to achieve your organization's long-term goals.

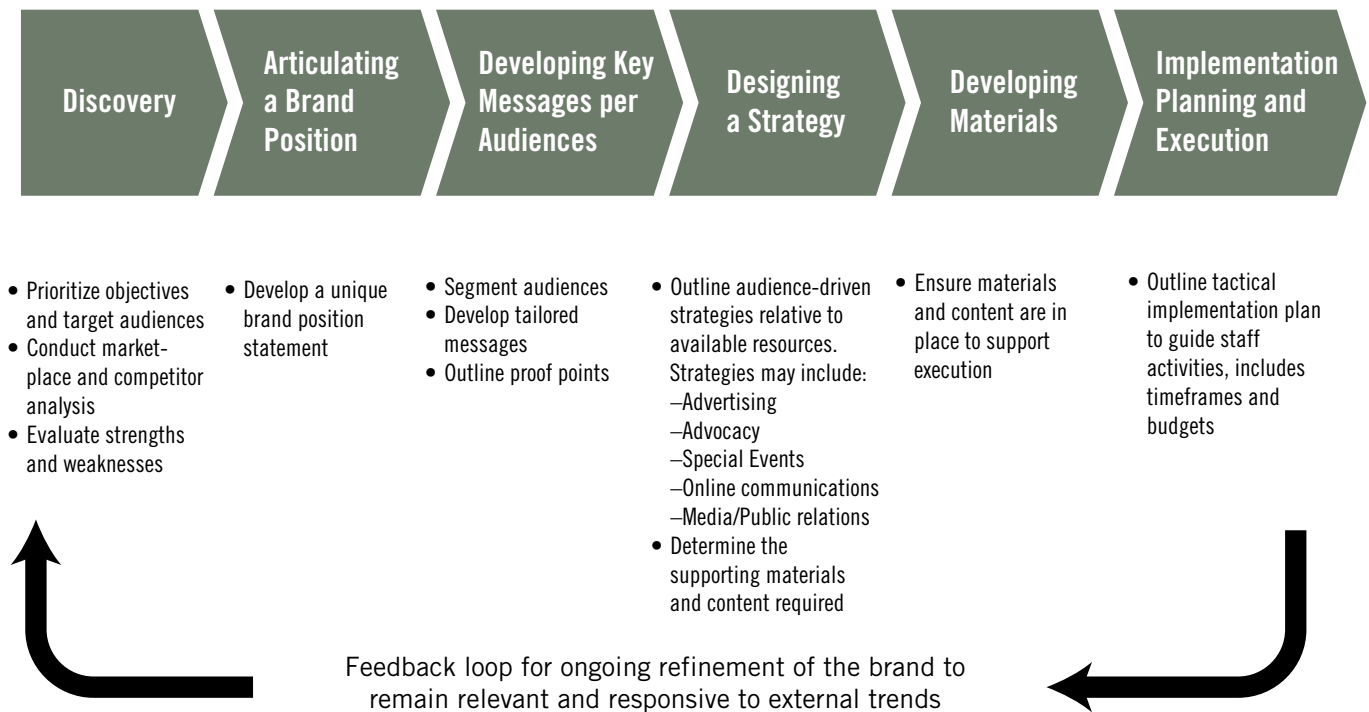
For associations ranging from start-up to mature, the following pages outline a process for establishing and managing your brand and attempt to demystify terms, such as branding, brand position, audience segmentation, and key messages. While there is no one single, globally accepted approach, this note provides a "big picture" view of what a cohesive process and strategy can look like. Peer organizations also share some of their experiences and strategies to illustrate how associations are putting their strategies into practice.

Elements of a Brand and an Integrated Marketing and Communication Strategy

In every sector, quality, convenience, and profitability are critical success factors. Equally critical, yet often overlooked, is an organization’s reputation or brand. This is especially true for mission-driven organizations, whose credibility is often their most sacred asset. If your products are great, but your credibility is questionable, your organization can only go so far. Earning credibility and trust takes time. Organizations must articulate a strong and differentiated brand position and then reinforce it through consistent marketing and communications.

You may ask what is a brand position and how do you know which marketing and communications activities should be prioritized? This technical note outlines the basic elements of, and process for, articulating your brand and the IMC strategy to support it. The following pages offer a brief overview of each element, examples, shared experiences from microfinance associations, and a toolbox of templates to get started.

Figure 1. Process Model for Developing a Strong Brand and Supportive IMC Strategy



Step 1: Discovery

The root of any good brand strategy begins with a firm understanding of the organization's goals articulated in its business plan. All too often, a marketing or communications colleague is tasked with developing a strategic marketing plan with little or no exposure to the organization's leadership or long-term goals. Your brand is more than a mission statement: it is the part of value proposition actively communicated to your target audiences and projects an advantage over competing brands.¹ In short, your brand position is what you wish your organization to stand for, in the eyes of your external audiences. Whatever you wish to stand for should be directly linked to the organization's goals, target audiences, strengths, and market.

To begin, it is useful to take a step back and begin with a review of your organization's business plan, recalling the fundamental building blocks of your long-term strategy. The following section provides an overview of the critical pieces of your business plan that inform your organization's brand position.

Organizational Objectives

What does your association wish to accomplish in the next 18 to 24 months? Examples may include:

- Be a recognized leader in the sector.
- Be a trusted resource for industry standards, market trends, and cutting edge solutions.
- Actively enable a supportive regulatory environment in partnership with policymakers.
- Be recognized for your role in advancing transparency and social impact in the sector.
- Play a valuable "connector" role in your microfinance market between key stakeholders and MFIs, between service providers and MFIs, and between providers themselves.

Target Audiences

Exactly who are your priority stakeholders or constituents? Determine who is most important to the success of your organization and prioritize them by level of importance. For instance, your members are most likely your most important audience, followed by staff. Audiences can typically be prioritized based on several factors, which may include how competitive the market is (how many others voices must your organization compete with), how dynamic the policy environment is in your region, how strong the international and/or regional media coverage is (positive, neutral, negative), etc. Sample audience groups include:

- Members
- Staff
- Central Bank
- Ministry of Finance
- Donors
- Private investors (domestic, international)
- Media

It may be important at this stage to consider how these audiences perceive your organization and how these perceptions differ from the image you wish to convey. Differ-

Box 1. Survey Techniques

A number of primary or secondary research tools can be used to understand how your organization is being perceived in the marketplace:

- Basic questionnaires administered via telephone, email, or face to face
- Focus groups discussions, particularly to test new messages or communication materials, logos, etc.
- Media audit using a purchased program, such as Lexis Nexis, or a simple news search using Google News
- Libraries, universities, and government agencies for a broader understanding of the market and your organization's reputation within it

1. Aaker, D.A., Biel, A.L. (1993), *Brand Equity and Advertising: Advertising's Role in Building Strong Brands*, Lawrence Erlbaum Associates, Hillsdale, NJ.

ent types of research tools can be used to gain concrete evidence about your public image, such as whether you have a reputation as a credible resource, whether decision-makers seek out your organization for input, how user-friendly your website and other external documents are, whether your members see your services as valuable, and so on. Perception is reality and organizations are often not sufficiently aware of how they are being perceived in the marketplace.

Marketplace Analysis

What are the current trends and where is the future of your region's sector headed? Recognizing this, both in your region and internationally, will ensure that your organization's brand position and messages are focused, relevant, and forward-looking. SEEP's *State of the Sector Analysis Guide* is a useful resource for associations conducting this type of investigation.

Media audits are another useful method for identifying marketplace trends as defined by the international and regional media. A media audit is a review of all relevant media coverage over a particular period of time, typically 6–12 months, usually with a searchable online database. The media audit will not only help identify relevant trends but also those individuals or organizations that are “influencers” or whose expertise lends them significant credibility. A strategic marketing and communications plan may include a strategy specifically designed to engage these players.

Competitor Analysis

Your brand position must be developed in relation to other organizations with whom you compete for media attention, donor support, or members. This component of your research will help you determine who your peer institutions are, how they are perceived, where they are going, what audiences they cater to, and, most importantly, what distinguishes your organization from theirs.

“Success means never letting the competition define you. Instead, you have to define yourself based on the point of view you care deeply about.”

-Tom Chappell, Entrepreneur

Intensity of competition may vary significantly from market to market. In some markets, associations may compete with a range of organizations. However, competition does not always come from other associations. In some instances, competition may come from a member. Evaluating two to four organizations can help you identify where your association can differentiate itself. Below is a short list of questions that may help you assess your peers:

- What are their goals?
- What products or services do they offer; which are unique?
- Who are their constituents?
- What are their key messages?
- How are they perceived?
- What works for them and what doesn't?
- What communications channels and tools are they employing?

Analysis of Strengths and Weaknesses

In order to know where your organization should go, you need to know where you are right now. An internal assessment of your organization's strengths and weaknesses, with a particular emphasis on member feedback, will give you concrete information on the organization's perceived strengths.

The SEEP Network has developed a number of tools to help associations perform these types of internal evaluations. The *Member Feedback Tool* is an effective method for gauging member satisfaction and for identifying the major challenges and opportunities in the coming years. In addition, the *Network Capacity Assessment Tool (NCAT)* provides a more comprehensive external analysis of the association's strengths and weaknesses that can be used to illicit information on organizational effectiveness and reputation.

Step 2: Articulating a Brand Position

Your brand position is a culmination of the value your organization brings to the marketplace, as well as what you wish to stand for in the eyes of your most important stakeholders. It is built upon the key strategic parameters defined during the business planning process outlined above (organizational objectives, target audiences, strengths, weaknesses, marketplace trends, and competitor insights). Similar to a filter, these parameters provide a useful guide to articulating a powerful and unique brand position.

No two organizations will define their position in the market exactly the same way. Strive to go beyond the generic and be specific about how and where your organization is unique. What does your organization do that no other does? What you stand for will be the focus of not just your communications and marketing efforts but your advocacy activities, member recruitment, fundraising, and capital-raising activities as well. Once you have your brand in place, you must proactively manage it with a clear message and consistent marketing and communications efforts.

A brand position statement should be roughly 200–300 words and should become an internal mantra for the organization. It should be specific about what your organization does and describe your organization's vision, personality, and unique value. It takes your mission statement a step further.

Below is an example of a brand position statement taken from SEEP's Network Development Services. In 2009, there was increased interest by international donors in the role that associations play in advancing the microfinance sector.

Box 2

Sample strengths

- Extensive credibility due to member representation (diversity, sophistication, geography, etc.)
- Trusted resource by the international media on microfinance in the region
- Responsible for the region's first social performance regulation in partnership with members

Sample weaknesses

- Weak "membership value"
- Inconsistent communications resulting in varying levels of awareness about the association's focus, value, and services
- Variable sophistication and capacity of microfinance institutions in the region, making representation of the industry evenly challenging

Figure 2. Criteria for Articulating a Brand Position



While The SEEP Network has focused on this arena for several years, it had not positioned itself as the organization *leading* this field. Several similar organizations have begun to invest in association programs and SEEP recognized that it needed to differentiate itself in the market. The statement in the example below was developed by the Network Development Services during an offsite retreat, which challenged the team to articulate a clear and unique position related to its work with microfinance associations.

Figure 3. Brand Positioning Broken Down



Step 3: Developing Key Messages

Developing key messages can be broken down into two simple steps: prioritize your audiences and tailor your organizational messages to each of them.

Remember Your Audience

Referring back to the target audiences that your organization wants to prioritize, what do you wish them to know or think about you? Segment these audience groups into specific subgroups or individuals, such as members. Further divide these audience subgroups into subcategories, such as new members, existing members, legacy members (members for 5+ years), or prospective members. This will help narrow the focus of your marketing and communications activities, and allow you to tailor messages to specific target groups.

For example, if one of your organizational goals is to increase your association’s participation in policy debate and discussion, you should consider “policymakers” as one of your target audiences. Subdividing this audience even further allows you to identify specific organizations or individuals for laser-sharp communications of a specific message. Similarly, if one of your goals is to increase donor funding to support sector-wide learning, you may wish to identify donor agencies with a particular interest in supporting the development of microfinance in your country or region.

Box 3. Perspectives from the Field

The Microfinance Centre (MFC) for Central & Eastern Europe and the New Independent States is an international grassroots network of more than 100 microfinance institutions from the region. MFC's mission is to contribute to poverty reduction and human potential development by promoting a socially oriented and sustainable microfinance sector that provides adequate financial and non-financial services to a large number of poor families and microentrepreneurs. MFC fulfills its mission by providing high-quality service and building long-term relationships with the microfinance community.

Since its inception, MFC has provided valuable microfinance expertise to industry stakeholders in the region. However, they found that, although it had been established for many years, the organization regularly encountered confusion from external stakeholders regarding its role, value, and mission. Some thought MFC was a think tank and others thought it was a consulting firm. After some internal reflection, they realized that the confusion in the marketplace was a result of inconsistent communications on their part.

Starting in early 2009, MFC Management launched an internal initiative to assess the organization's brand and determine how it could begin to reposition itself more clearly. MFC hired an outside consultant to help understand external perceptions of the organization and how it could use its core competencies, not only to provide unique value in the industry, but also to differentiate themselves.

The consultant started by conducting a thorough communications audit, including interviews with external stakeholders and reviewing the competitive landscape. "We learned a lot about what others thought of us and what the needs were in the marketplace," says Grzegorz Galusek, MFC's Executive Director. "We realized what our core strengths were and that we were in a unique position to play the role of facilitator, convener, and trendsetter in the region."

Following the audit, MFC organized an internal retreat to determine how it could reposition itself with new and compelling messages. The offsite retreat quickly refocused into a brainstorming session to develop new messaging to describe MFC, its programs, its role, and its unique value, and to triangulate that into an overall marketing and communications strategy.

Once MFC's staff had solidified its new brand positioning and messaging, its communications team developed several communications tools and began to announce this new shift proactively. An introductory email and welcome letter were sent to all its members, new fact sheets were developed, and it launched a new, improved newsletter.

Develop Your Message

Once the brand position and primary target audiences have been determined, the organization must decide what it wants others to know and say about it. Whether you are trying to educate, discuss, promote, or advocate, key messages guide the conversation. This is especially critical when working with members of the media. A common phrase, "staying on message," means staying focused on only the messages you want a reporter to take away from the conversation. (See Appendix 4 for tips on how to work with the media and stay on message.)

Key messages keep your reputation consistent and aligned with your brand, delivered through materials, content (on and offline), and spokespeople. The most important element of key messaging is consistency. Just like product-based companies, such as a car company or a beverage maker, associations must continually reinforce its messages by using the same words, tone, and style over time.

Keep in mind that key messages help tell a story, but they must be based upon real proof points or facts. A key message may be that social performance standards are a critical cornerstone of a successful MFI. You need specific facts to reinforce this statement. Quite often, internal key-message documents include proof points to accompany each message for quick reference, should a spokesperson be talking to a reporter or a regulator and need further explanation.

Table 1 below provides an example of a messaging framework. This framework can be used to outline an organization's brand and IMC strategy, and guide detailed individual and team work plans throughout the year. Keep in mind that there is no one single approach to planning, but you can begin to see how it all fits together with this model. The audience-driven framework demonstrates how all of the components of an IMC strategy support your organization's brand and message.

An organizational message guide is an incredibly valuable tool to have. This internal resource can be used as a "cheat sheet" or quick reference document when communicating with stakeholders. It may include several elements, such as key messages per target audience, proof points, frequently asked questions, etc. A message guide should be available to all staff and board members who frequently have contact with individuals outside the organization.

Box 4. Tips for Developing Key Messages

- Develop key messages, which can describe your organization overall, to any audience.
- Go a step further and develop key messages for each target audience. This ensures that your messages resonate with who they are and what is important to them.
- Avoid technical jargon. Be direct and concrete, using specific language and details.
- Use emotional and compelling stories and language to win people's hearts.
- Engage members of your staff and board to help develop key messaging, but have a clear decision-making process, so that final decisions can be made and acted on.

Table 1. Example Message Framework

Microfinance Association ABCs			
Confirmed business objectives	<ul style="list-style-type: none"> • Be a trusted resource to policymakers and increase the level of participation in policy debate and development. • Be a trusted resource for industry standards, market trends, and cutting edge solutions. • Play a valuable “connector” role in your microfinance market between influential MFIs, between service providers and MFIs, and between providers themselves. • Protect and grow member base. 		
Brand position and supporting key messages	Insert your organization’s brand position and supporting key messages. These are “corporate messages” and are generic to all audience groups.		
Target audiences	Members	Policymakers	Media
Audience-specific key messages and supportive proof points	<p><i>Key messages:</i> The microfinance association provides valuable resources to MFIs, helping them reach their potential and increase their social and financial impacts.</p> <p><i>Proof points:</i></p> <ul style="list-style-type: none"> • The microfinance association has helped leverage US\$ 3.5 million in commercial capital for its signature members since 2007. • A 2009 impact report showed that the microfinance association’s members have improved the livelihoods of 90% of their clients, as opposed to non-member institutions. 	<p><i>Key message:</i> The microfinance association believes that appropriate, transparent, and socially responsible microfinance is one of the most effective strategies to alleviating poverty in country A and is committed to ensuring that institutions act ethically and are supported by appropriate regulation.</p> <p><i>Proof points:</i></p> <ul style="list-style-type: none"> • Serving as an expert advisor, the microfinance association worked with its partners and the NGO community to research and develop best-in-industry practices for addressing transparency and social performance in microfinance. • Each year, the organization publishes bi-annual industry reports that highlight best practices and demonstrate to practitioners and policymakers that fair and ethical microfinance is possible and can make a social impact (insert supporting statistics where possible). 	<p><i>Key message:</i> The microfinance association is the “go-to” resource for trends, statistics, challenges, perspectives, and access to any industry expert.</p> <p><i>Proof points:</i></p> <ul style="list-style-type: none"> • In 2009, the microfinance association hosted a media roundtable, which connected members of the media with industry experts following the first initial public offering of an MFI in country B.
Integrated marketing and communications strategies and tactics	<ul style="list-style-type: none"> • Online content targeted to members; peer-to-peer exchange (password protected) • Member newsletters (hard copy or electronic) • Member events (closed and open) • Electronic alerts with member discounts and promotions • Awards program (e.g., innovation awards) • Event sponsorship • Topic-appropriate webinar(s) • Media placement in major trade outlets 	<ul style="list-style-type: none"> • Convene influential industry actors and play a facilitator role (keeping a neutral position) • Be a trusted resource by investing in research and publishing of industry trends • Design a branded knowledge series of events as a signature asset of the microfinance association • Publish annual or bi-annual research and/or case studies • Publish and distribute electronic newsletters with relevant information • Make media placements in major news outlets 	<ul style="list-style-type: none"> • Regularly update web content • Provide regular updates through press releases • Annual or biannual research • Host media roundtables, directly connecting reporters to experts • Invite media on field visits • Offer “meet an expert” opportunities via the association website • Hold topic-appropriate webinars

Step 4: Designing an Integrated Marketing and Communication Strategy

Once your organization’s brand position and messaging are established, identifying the appropriate communication channels is necessary. This should be an integrated mix of marketing and communications activities, which reinforce a consistent brand experience at every turn.

For organizations whose missions are complex, prioritizing activities and tactics for each target audience is useful. This audience-driven approach provides a strong focus and structure to an organization’s strategy and helps ensure that stakeholders are clear about who the microfinance association is, what value it provides, and why it is unique.

Matching the correct communications and marketing tools to the right objective and audience(s) takes careful consideration and planning. The following cost-benefit analysis chart gives some idea of the costs, reach, and best use of various media options. It should be used to identify the most effective ways of reaching your target audiences with the appropriate media for your message, within your budget.

Table 2. Costs and Benefits of Select Communications and Marketing Activities

Tactic	Audience Reach	Costs	Benefits
Annual report	Targeted	High	Stewardship and attraction of donors, foundations, partners, etc.
Membership newsletter	Targeted	Low to mid	Stewardship and attraction of members
Magazine	Targeted	High	Cultivation of a reputation as a knowledge leader and partner
Major events (fundraiser, major conference)	Targeted	High	Cultivation of a reputation as a knowledge leader, partnerships, and funding
Minor events (open house, lectures, roundtables)	Targeted or broad range of audiences	Low	Attraction of new prospects
Website	Broad range of audiences	Low to high	Promotional or informational source, reinforcement of brand and message
E-newsletter	Targeted	Low	Reinforcement of brand and message; maintenance of relationships
National media distribution	Media and broad range of audiences	Low to mid	Building of awareness; reaching new audiences
Video news release	Broad range of audiences	Mid	Building of awareness, best for mid-sized markets
Public opinion poll	Broad range of audiences, stakeholders	Mid to high	Benchmarking or testing, trend tracking
Advertising/print	Broad range of audiences (unless it is a specialty publication)	Mid to high	Promotional or informational, reinforcement of brand and message
Advertising/TV	Broad range of audiences	High	Promotional or informational, reinforcement of brand and message
Advertising/radio	Broad range of audiences (more effective with rural markets)	Mid	Promotional or informational, reinforcement of brand and message
Promotional items (pens, pads, stickers, etc.)	Broad range of audiences	Low	Reaching new supporters and reinforcement of brand and message

Source: Cause Communications. *Communications Toolkit*. Cause Communications.2005.

Once you have done this cost-benefit analysis, you can begin mapping out the marketing and communications channels you wish to consider. Below is a snapshot of some sample marketing and communication channels to consider.

Table 3. Sample Communication and Marketing Channels

Type of channel	Tactical execution
Online media and E-content	<ul style="list-style-type: none"> • E-newsletters, tailored content per audience(s), different formats vs. general • Maintenance and engagement of audiences via social networking sites • Mobile and/or E-alerts tailored to specific audiences
Advertising	<ul style="list-style-type: none"> • Sponsorship of industry events • Online advertising with the use of banner ads • Traditional print advertising in local, international, trade publications
Media/Public relations	<ul style="list-style-type: none"> • Media roundtables • 1:1 relationship building with key reporters and media outlets • Participation industry awards programs • Annual or biannual research and/or case studies for release
Special events	<ul style="list-style-type: none"> • Annual conference • Regional events • Participation in industry events • Coordination of MFI field visits for industry stakeholders • Topic-based webinars • Regional policy series

Step 5: Developing Materials

Every organization, big or small, should have a standard suite of marketing materials on hand. A typical suite of materials includes an organizational fact sheet, a corporate brochure, an annual report, a basic PowerPoint presentation, and business cards. Each product should reinforce your brand and messages, and be easily accessible to anyone wanting to learn more about your organization.

Making materials accessible to anyone is a great way of promoting your message, even when you are not doing so actively. Post materials on your website for easy downloading. Provide materials to your “brand ambassadors,” such as members, board members, and staff. Provide materials to media as soon as they call, so your organization is included in their story.

While this technical note does not examine the concept of a visual identity in depth, materials should always be designed to be consistent. This can be achieved with a good graphic designer and clear branding guidelines. A branding guideline document is an internal document, which outlines the following elements:

- Logo usage: preferred use of the logo (color, texture, background, etc.)
- Logo format: examples of how to display the logo in different contexts
- Unacceptable logo uses: examples of how *not* to use your organization’s logo
- Typography and color palette: outlines which fonts, sizes, and colors can be used. Colors usually include the exact PMS number, which is helpful when you hire an outside designer to create new materials and they need to know which colors and fonts
- Correspondence: examples of letterhead, envelopes, business cards, etc., with the logo and correct typography

See Appendix 5 to see an example of branding guidelines.

Box 5. Perspectives from the Field

ProDesarrollo, Finance and Microenterprise, A.C. is a national network of institutions in Mexico that provides financial services, seeks to contribute to economic development, and fight poverty through the efficient allocation of credit, savings, advice, and training of the population living in poverty as part of a support process for sustainable development. ProDesarrollo's membership includes 86 financial service organizations serving over 2 million people, 79 percent of whom are women.

Mexico's microfinance sector has come under intense scrutiny since BancoCompartamos, a very prominent microfinance institution in Mexico, held an IPO in 2007. The IPO was seen as controversial by many and sparked intense debate throughout the industry regarding the privatization of microfinance. As one of the leading microfinance associations in the country, ProDesarrollo had the opportunity to play an active role in the debate by having a dynamic media strategy in place.

The foundation of their media strategy is their messaging. The communications team spends a lot of time tracking trending issues and membership perspectives, so they are prepared to respond. Tracking external trends, journalist's interests, and those of their members can be time consuming, but critical to ensuring that ProDesarrollo remains relevant and active. Success has meant an increase in calls for comment and opinion, and with that has come the ongoing challenge of knowing exactly what their position is on any given day on a spectrum of topics.

In addition to having strong messages in place, ProDesarrollo employs a robust media strategy, which includes several elements:

- Conducting ongoing trend tracking in the media
- Maintaining a database of media contacts, prioritized into two tiers, primary and secondary
- Hosting an annual press conference to unveil industry benchmarking reports
- Issuing quarterly press releases which include newly updated industry statistics
- Investing time in developing supportive materials with key statistics and valuable information

Since 2008 ProDesarrollo has seen the number of calls from the media increase, looking for comments on important industry stories and trends. Because they have a relevant message and reinforce that message consistently through a variety of channels, they have established themselves as a credible resource for industry information, which helps reinforce their reputation in the market.

Step 6: Implementation Planning and Execution

An implementation plan is what turns a strategy into day-to-day action. The strategy focuses on the “what” and “why,” while the implementation focuses on “who,” “where,” “when,” and “how.” A great strategy lies in successfully implementing it.

There are many variations to implementation plans, ranging from very detailed to more high-level plans, Excel documents to PowerPoint slides, departmental work plans versus individual work plans, and so on. There is no one solution. Implementation plans should be designed in ways that are most meaningful and helpful to the staff carrying them out. No single document can capture all the details of each marketing and communication activity. For example, the staff member responsible for a nationwide advertising campaign will most likely need to develop a work plan specific to that strategy. However, it is helpful to have a master plan that outlines all the activities happening in a given year. Consider these tips for developing a long-term implementation plan:

- Develop a document that captures all of the activities planned throughout the year on a month-by-month basis in a calendar format.
- Marketing and communications are open-ended processes. There is a beginning and a middle, but never an end. The market is always changing, so remain flexible.
- While your brand position and messages may remain intact, experimenting with new technologies or marketing communications ideas helps keep your organization in the mind of key audiences.
- Capture every single idea, but prioritize activities based on resources that are realistically available.

- Give your staff and their plans time to succeed. Establish a baseline and measure the results over time. It may not work right away, but returns may show up down the road if it is a true long-term strategy. Working with the media, for instance, is a long-term commitment.
- Align your IMC strategy with the right staff. Public affairs, media relations, writing, and graphic design require different sets of skills for instance.

Below is an example of a high-level implementation plan that can be used to communicate your organization’s activities for the year to staff or other internal stakeholders, such as board members.

By outlining your organization’s activities, relative to industry events, milestones, and regularly scheduled communications, you can plan accordingly. Mapping out your plan in relation to the outside world can sometimes reveal better timing, opportunities, themes, or special topics of interest, and so forth.

Table 4. High-Level Implementation Plan by Quarter

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Industry events	Regional microfinance conference	International Development Bank conference on Global Financial Inclusion	Global finance conference	SEEP annual conference
Sector milestones	Launch of the region’s first microfinance regulation	World Microfinance Day	Potential IPO of MFI X	10-year report of Microfinance sector by MicroCredit Summit and Grameen Bank
Regularly scheduled communications	<ul style="list-style-type: none"> • Newsletter • Annual report • Update web content 	<ul style="list-style-type: none"> • Newsletter • Update web content 	<ul style="list-style-type: none"> • Newsletter • Fundraising campaign • Update web content 	<ul style="list-style-type: none"> • Newsletter • Update web content
Editorial calendar: communications themes	Each quarter or month, a new theme or focus should be enforced through your communications and marketing activities. Themes should correspond with industry trends and/or important announcements from your associations.			
Communications and marketing activities	<ul style="list-style-type: none"> • Host a quarterly policy event • Plan 3 member events • Host a bi-annual webinar 	<ul style="list-style-type: none"> • Host a quarterly policy event • Plan member events • Publish annual case studies • Host field visits/MFI media tour • Launch new brand identity 	<ul style="list-style-type: none"> • Host a quarterly policy event • Regularly update web content • Conduct media roundtables that directly connecting reporters to experts • Host a bi-annual webinar 	<ul style="list-style-type: none"> • Host a quarterly policy event • Publish a bi-annual newsletter • Plan member events • Launch a “Meet an Expert” program via the association website and press releases • Launch year-end sector report

Tactical Execution

Now that you have a broad strategy in place (confirmed objectives, target audiences, brand positioning, messages, and integrated marketing and communications channels) staff are ready to turn their attention to bringing the brand to life through the execution of activities on a weekly and monthly basis. While your annual implementation plan captures the key activities for the year, below is a snapshot of a more detailed monthly plan.

Table 5. High-Level Implementation Plan by Month

	January	February	March	April	May
Events		Annual meeting	Webinar series	Policy roundtable	Webinar series
Communications	Monthly newsletter	Monthly newsletter	Monthly newsletter	Monthly newsletter	Monthly newsletter
Media		Publish annual research and trends report		Press around impact of new trends in the sector on regulation	

Note that this calendar is based on previously determined objectives and that target audiences and activities have been prioritized based on how they support the aforementioned objectives and reinforce your organization's brand position.

A calendar like this provides a useful summary for staff to quickly reference which activities are planned and for when. There should be no surprises. Staff should know, for instance, that in February the organization will release its annual research and trends report and start preparing in advance.

An action plan will help lay out all the activities required to carry out each tactic. Each event, press conference, press release, and/or newsletter may require their own sub-plans. Some may be extensive, while others can be summarized in a one-page brief, depending on the level of effort required. It is the execution of your tactics that generates awareness of the organization's brand and strengthens its reputation.

Below is an example of how an organization can begin to think about the realistic time and resources required to fulfill one particular tactic by publishing an annual research and trends report. Many associations carry out industry research throughout the year and then publish findings via a press release and/or press conference. This can be a smart strategy for establishing or maintaining leadership in the sector.

Table 6. Sample Tactical Plan

Action Plan: Publish Annual Research and Trends Report								
	Jan 1-5	Jan 8-12	Jan 15-19	Jan 22-26	Jan 29-2	Feb 5-9	Feb 12-16	Feb 19-23
Finalize annual study results and quantify key trends.								
Identify and secure internal and external spokespersons to present findings at a press conference, including high-level stakeholders, such as policymakers, visible MFIs, etc.								
Draft content for press release, website, talking points, and fact sheets. The report and fact sheets should be available for download on your website.								
Finalize content and train spokespeople								
Develop media lists (targeted lists based on key markets, target audiences, key messages, engaged media, past reporters, etc.).								
Send out a press advisory with preliminary results and an invitation to attend the press conference.								
Follow up with priority reporters, especially those who showed interest or had outstanding questions.								
Release press announcement on wire service.								
Ensure that formal announcement is loaded to the website.								
Set up audio-visual equipment for the press conference, set up a media sign-in table, and put press kits out.								
Host press conference.								
Follow-up with journalists one-on-one.								
Conduct a media audit to determine coverage and circulate to board and staff.								

Box 6. Perspectives from the Field

The Azerbaijan Micro-finance Association (AMFA) is an organization with over 27 members, all of which are microfinance institutions across Azerbaijan. Microfinance programs started informally in the mid-1990s to help meet the economic requirements of internally displaced persons (IDPs) and began a formalized alliance of what would become the AMFA in 2001. Legally established in 2004, AMFA utilizes knowledge management, policy advocacy, and technical services to advance the interests of the microfinance community in Azerbaijan.

Although AMFA was formally launched nearly 6 years ago, it is still a young brand. AMFA’s executive director has made marketing communications a major priority for the organization over the past several years. One of its goals for next year is to continue strengthening its reputation as a credible, professional, and trusted partner in the microfinance industry. This is a critical component for achieving several of AMFA’s goals, including advocacy and membership.

Each year, AMFA’s annual planning process starts with the development of a strategic business plan approved by their board of directors in December. That strategic plan is then presented to AMFA staff to use as the basis for outlining their individual work plans. The communications team is made up of three staff members, one of which reports directly to the executive director. The team is organized around functional areas of expertise, such as public affairs, media relations, web development, special events, and annual reporting. Based on their strategic business goals this year, the following are the key strategies that they will employ to reinforce their position in the marketplace:

- Publish and promote market research (6 times/year).
- Host an annual dinner to promote networking and industry leadership.
- Tailor messages for each target audience to reinforce a consistent brand position with all its stakeholders.
- Maintain a frequently updated website to provide regular communications with stakeholders.
- Proactively communicate with stakeholders through turn-key communications tools such as the, website, online newsletters, email alerts, etc.

Evaluating Your Marketing/Communications Strategy

Quantifying the impact of your communications efforts can be challenging, but it does not have to be costly. Ongoing measurement of your work will help you make small adjustments along the way to maximize results. It will also help demonstrate to your senior leadership, board members, and donors, in tangible terms, the value of an integrated marketing communications strategy.

Begin evaluating your strategy from day one. The only way to know how far you have come is to know where you began. Before a new initiative is launched or new campaign developed, survey your target audiences to quantify their level of awareness or perceptions of the organization. After a new campaign or publication is launched, you will be able to measure the difference your communications efforts made by surveying the same group after the fact. If your marketing efforts are supporting a fundraising goal, be sure you can track all funds received. If people donate because they learned of your organization through a marketing campaign, your efforts have been successful.

There are many ways to measure the impact of marketing and communications efforts either through quantitative measures or qualitative. Below is a chart which captures a few methods for measuring different kinds of activities.

Table 7. Measuring Activities

Activity	Measurement
Media	<ul style="list-style-type: none"> • Number of impressions² • Number of placements • Number of times the same story ran or your key messages were present in a placement • Number of stories were proactively placed versus reactively placed • Number of times your organization was the lead in a story or just mentioned
Publications	<ul style="list-style-type: none"> • Circulation • Placement of the publication • Peer-reviewed publication quantified differently than open submission-based publications • Number of times a technical publication approached your organization for input versus proactively pitched them to submit content
Web	<ul style="list-style-type: none"> • Direct feedback online • Tracking online gifts • “Bounce rate,” e.g., the rate at which visitors to your site exit in relation to how many pages they visited before exiting • Number of unique visitors • High-ranking search results, e.g., search engine optimization (SEO). When conducting a search using key words, your organization’s website will appear as long as your site includes the right key words in its copy and as long as your organization is consistently producing new content on the web.
Brand awareness	<ul style="list-style-type: none"> • High-ranking search results • Perceptions and awareness qualified through direct surveys • Number of times your organization is called for a quote in the media • Number of unsolicited speaking invitations received • Number of unsolicited awards received

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 2. Media impressions are the number of people who have heard or seen your message. There are several industry methods for calculating media impressions depending on what type of media you are measuring.

Conclusion

The microfinance sector is growing rapidly. Every day a new institution, regulation, media story, or think tank emerges. As the industry continues to grow, organizations will be faced with increased competition for funding, partners, members, media exposure, and trust. For better or worse, organizations need to differentiate themselves from others. How that is accomplished depends a great deal on the savvy and sophistication of the marketing and communications teams and the commitment of senior leadership. Together, an organization can build a strong foundation of quality products and services and then prepare to tell the world about it. These two go hand-in-hand.

This technical note was designed to help marketing and communications practitioners by providing a framework to guide their work. Whether starting at the beginning or somewhere in the middle, this resource should offer valuable tips and examples for a practitioner at any stage.

Bibliography

- Aaker, D.A., Biel, A.L. (1993). *Brand Equity and Advertising: Advertising's Role in Building Strong Brands*. Lawrence Erlbaum Associates. Hilldale, NJ.
- Cause Communications. *Communications Toolkit*. Cause Communications. 2005.

Appendix 1: Practitioner Toolbox

There are several essential tools and resources that a marketing or communications professional should always have within reach.

Collateral Materials

- Organizational fact sheet
- A collection of case studies
- An annual report of milestones and impact(s) achieved
- A PowerPoint presentation overview of the organization

Message Guide

- Organizational key messages
- Messages and proof points tailored for each target audience
- FAQ (frequently asked questions)
- Words to use, words not to use
- Internal and external Q&A (questions and answers)

Brand Guidelines

- Logo overview and various versions
- Signature system
- Color palette and typography
- Examples of how or where not to use logos
- Trademarks

Organizational Website

- This is your “store front,” the most important channel of communication.
- Keep content regularly updated.
- Write content with specific search terms in mind—search engine optimization.
- Use Google analytics or another platform to track website traffic and marketing effectiveness.

Templates

- Press release
- Staff biography
- Program fact sheet
- Branded PowerPoint slides
- Newsletter (print and/or online)

CRM System

- Maintain an effective CRM (customer relationship management) system to track incoming and outgoing communications, member dues, event participation, etc.
- A CRM system can also track the progress of key relationships (e.g., media) by providing a platform to store meeting notes, relationship details, personal interests, etc.
- CRM systems range from free to very expensive. If there are multiple uses for a CRM system across the organization, a long-term investment may be necessary.
- For more expensive options, be sure to ask about nonprofit rates and discounts as they apply to your organization.

Appendix 2: Organizational Fact Sheet

A fact sheet is used to provide easy-to-read and accessible information to external stakeholders, so that they may learn about your organization, perspectives, products and services, and mission at a glance. Fact sheets should be easy to read and include compelling images and/or quotes. They are especially helpful when providing information to members of the media, policymakers, and potential members. Below are a few helpful tips:

- A fact sheet should be one or two pages (front and back).
- As budget allows, fact sheets should be full color and include compelling images.
- An organization can have many fact sheets, one per program, one per policy, per audience, etc.
- Text should be brief and/or bulleted where appropriate for easy reading
- Similar to a press release, place the most important information in the first paragraph.
- Use good design and color to organize your content.

Here is an example of a well designed and effective fact sheet from Oxfam America, a humanitarian organization focused on reducing worldwide poverty.

Bold title with organization name and logo

Snapshot of the organization's work or response to this topic

Good use of compelling image and quotes

Organizational boilerplate, or short description, and tagline

Great use of design elements to organize content effectively: white space, colors, font sizes, text boxes, etc.

Appendix 3: Press Release Guidelines

A press release should include a bold headline, proper formatting, and complete information. All information must be accurate and grammatically correct. Most importantly, the content must be newsworthy.³ Below are some helpful guidelines:

Formatting

- Use 8.5 x 11 inch paper with 1” inch margins
- Do not print double-sided copies.
- FOR IMMEDIATE RELEASE should be written at the top, along with the date.
- If you are releasing news in advance of the official announcement, indicate the release is “embargoed” until a certain date and time.
- Include complete contact information.
- List the location and date at the beginning of the first line, followed by two dashes.
- The content should include “who, what, when, where, why, and how.”
- If your release is more than one page, end the page with “more” at the bottom center of the page to indicate that there is a second page.
- Insert your “boiler plate” or standard description of your organization at the end of the release.
- To indicate the end of the release, insert date at the bottom center of the page.

Content

- A release should be written like a news story, with the most important news at the top. Most journalists and editors scan only the headline and lead paragraph; if the first 50 words do not get their attention, they will not respond.
- Some publications and websites may shorten your release to fit the available space, which is usually the last paragraph or two. Be sure that the most important information is in the first paragraph.
- If you have a spokesperson willing to provide a quote, include that as the second paragraph to add a compelling feature to the story and give the writer a quick quote to use.
- If the release is in partnership with another organization, be sure to use both organizations’ boilerplate information at the bottom of the release.

FOR IMMEDIATE RELEASE
Date

Contact:
Jane Publicist
Nonprofit ABC
(123) 456-7890

**NONPROFIT ABC RELEASES SURVEY FINDINGS FOR ARTS
FUNDING IN ABC COUNTY**

Results Underscore Vulnerability of ABC County’s Arts Community

ABC, CA, Date — “Arts in the Balance,” which summarizes the findings of the third biennial survey of corporate, foundation and government arts funding in ABC County, was released today by Nonprofit ABC. The most in-depth review of its kind to date, the ABC survey tracked arts giving from 65 grantmaking agencies to 600 nonprofit recipients in ABC County for YEAR, the funders’ most recently completed fiscal year. The results, which were compared with previous surveys conducted, dramatically underscored the vulnerability of ABC County’s arts community.

“Arts organizations contribute richly to the economic health and well being of the diverse neighborhoods that comprise the ABC County,” said the president of Nonprofit ABC. “Of particular concern are the smaller, community-based enterprises including neighborhood theaters, galleries and arts education programs which stand to suffer the most if the funding trends and habits reflect in the survey continue.”

Citing key survey findings, the president of Nonprofit ABC noted that funding for the arts, in general, has declined significantly, and that four public agencies and six private foundations accounted for 75 percent of arts funding in YEAR.

“Overall, the survey results reflect an unbalanced distribution of dollars,” added the president of ABC. “However, to foster a vital creative environment in ABC County funding must embrace a broad range of organizations and artistic disciplines.”

The survey summary, “Arts in the Balance,” may be viewed at www.nonprofitabc.org or obtained by calling Nonprofit ABC at (123) 456-7890.

Founded in YEAR, Nonprofit ABC is a nonprofit 501(c)3 committed to a strong and vibrant philanthropic community that improves the quality of life for all residents in ABC County. Nonprofit ABC’s mission is to support and advance effective and responsible philanthropy through partnerships with private-sector grantmakers.

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3. Cause Communications. Communications Toolkit. Cause Communications. 2005.

Appendix 4: Media Dos and Don'ts

Do

- Do make sure your story is newsworthy and that it is of interest and appropriate for the publication or media outlet that you are pitching. Tailor your pitch to the specific reporter and publication.
- Be sure your spokespeople receive adequate media training.
- Do develop an internal policy for how your organization responds to media inquiries.
- Do introduce yourself long before you need to pitch a big story because relationships take time to build.
- Do return phone calls in a timely manner; reporters are usually on a tight deadline.
- Do make it easy for the media to reach you.
- Be brief.
- Be on time.
- Avoid technical jargon.
- Do ask for clarification if you do not understand the question.
- Be as helpful as possible, even if you must defer to another expert. Reporters will appreciate your assistance and will be more likely to call you in the future.
- If you do not know the answer, say you will get back to them and be sure to follow up.
- Do offer feedback when appropriate. If a story contains a major error, bring it to the reporter's attention. If you like a story, send a thank you note.

Don't

- Don't ask to review or approve the story before it's published.
- Never say "no comment." It sounds as though you are hiding something.
- Don't ask to speak off the record. Presume everything you say is on the record.
- Don't ignore a reporter's request for an interview.
- Do not mislead or lie to a reporter.
- Don't contact more than one reporter or editor at the same news organization about the same story without letting them know.
- Do not have more than one person from your organization pitch to the same media outlet.
- Don't schedule a press conference unless you have news that warrants significant coverage.

Appendix 5: Branding Guideline Example

Below you will find several snapshots of the kinds of content found in an organizational brand guide.

Logo Usage

The preferred usage of the logo is in color on a solid white background. When used on a textured or color background a white or black logo should be used.

Complete consistency is crucial when using the logo. Therefore, no alterations should be made to the logo or type, including scale changes, color changes, letterspacing changes, etc. Color and typography are two of the most effective elements for ensuring a clear and consistent presentation of the SEEP brand identity and are essential to maintaining a strong brand. The logo must never be reproduced in any colors or typefaces other than those specified.

typeface: Panoptica Regular



typeface: Adobe Garamond Pro Italic

Typography

typeface: Panoptica Regular



typeface: Adobe Garamond Pro Italic



Never reproduce in any other color than black, white or the full color logo.



printing in non-designated colors



condensing the logo



printing in non-designated colors



extending the logo

Color Palette



Blue 1

PMS 302 CMYK C 100 M 25 Y 0 K50 RGB R 0 G 84 B 128



Blue 2

PMS 5415 CMYK C 42 M 8 Y 0 K40 RGB R 93 G 135 B 161



Green 1

PMS 343 CMYK C 98 M 0 Y 72 K61 RGB R 0 G 87 B 61



Green 2

PMS 5625 CMYK C 28 M 0 Y 29 K48 RGB R 110 G 136 B 120

Business Card

CARD FRONT



NAME
8.5pt Myriad Pro Bold
10pt leading
flush left, optical kerning

TITLE
8pt Myriad Pro Light Italic
10pt leading
flush left, optical kerning

ADDRESS INFORMATION
7pt Myriad Pro Light
10pt leading
flush left, optical kerning
-5 tracking

CARD BACK (color varies)



Logo Format

Complete consistency is crucial when using the logo. Therefore, no alterations should be made to the logo or type, including scale changes, color changes, letterspacing changes, etc.

Logo with Tagline



Color Logo

Use in applications when on a white background, not smaller than 1" in length.

About SEEP

The SEEP Network is a global network of microenterprise development practitioners. Its 80+ institutional members are active in 180 countries and reach over 35 million microentrepreneurs and their families.

SEEP's mission is to connect these practitioners in a global learning environment so that they may reduce poverty through the power of enterprise. For 25 years, SEEP has engaged with practitioners from all over the globe to discuss challenges and innovative approaches to microenterprise development. As a member-driven organization, our members drive our agenda while SEEP provides the neutral platform to share their experiences and engage in new learning on innovative practices. The SEEP Network helps strengthen our members collective global efforts to improve the lives of the world's most vulnerable people.



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