



present

Marketing Your Meeting: How the Tried and the True Complement the New

Handout One: Sample Marketing Plan

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Sample Marketing Plan for
the ABCD Association's
Annual Conference
October 1-4, 2010

I. Goal (*What do you want to achieve?*)

To position ABCD's annual meeting as the most significant gathering of professionals in the financial services industry.

II. Objectives of campaign (*What is measurable?*)

- To create unique, cost-effective and measurable communication tools that inform all target audiences about the benefits of attending
- To use strategic and complimentary communication methods that will increase attendance
- To attract at least 50 new attendees
- To attract 2009 attendees to the conference
- To demonstrate ABCD's expertise in the industry

III. Target Audiences (*Who do you want to reach?*)

Previous year data attendee profile:

2008 - member	2009 - member
CEOs: 58%	CEOs: 60%
EVP: 25%	EVP: 23%
VP: 11%	VP: 9%
Other: 6%	Other: 8%

2008 - member	2009 - member
US: 70%	US: 69%
Spain: 13%	Spain: 12%
Mexico: 10%	Mexico: 11%
Japan: 6%	Japan: 8%

2010 Target Audiences:

- US-based member CEOs
- US-based member EVPs in financial service and GR SIG
- US-based VPs in financial services and GR SIG
- Members based in Spain, Mexico and Japan

IV. Key messages (*Messages to be used as a guide only and will be personalized as per the target audience*)

ABCD's Annual Meeting:

- Combines the best and brightest in the industry to showcase what's new
- Provides insight into the latest trends
- Is the premier meeting for executives in financial services
- Features dynamic speakers with global reputations
- Features a new virtual conference option
- Benefits a cross-section of industry professionals

V. Tactics (*What will get your audience's attention? What do they read/view/relate to?*)

A. E-mail

1. Save the date and early bird registration e-mail. In 2009, 53% of attendees registered by the early bird cut-off so we will capitalize response on this in 2010.
2. Early bird registration reminder to '07, '08 and '09 attendees who are non-members. With 34% of conference attendance coming from non-members, it's important to treat these individuals as a special category, with messaging that recognizes their previous year attendance.
3. Regional e-mails. Distribute an e-mail to members in Boston and surrounding cities recognizing their close proximity to the conference and highlighting specific aspects, encouraging them to attend and to bring a colleague.
4. Listservs. Messages about the conference will be placed on all categories of the listserv in conjunction with other messaging that is being distributed at the time (such as general sessions, early bird, etc.)
5. Chapter e-mails. A series of e-mails for chapter presidents to distribute will be written.
6. Staff e-mail signature. All staff members will include the show logo and a link to the website at the end of their e-mail signatures.

B. Direct Mail

Overview: Direct mail initiatives will focus on a succession of pieces being mailed within four months to targeted audiences. This will include the save-the-date postcard, brochure, early bird registration reminder postcards, regional postcards and program reminders.

1. Save the date/early bird registration postcard. Variable fields will be included in the member and previous-attendee versions, the person's first name, organization and their profession. The postcard will drive them to the Web for more information.
2. Registration brochure. This brochure will be mailed to all domestic members and select non-members and be available for download on the website.
3. Early bird registration postcard reminder to '07, '08 and '09 attendees who are not yet registered. The messaging on this postcard will vary slightly per target audience.
4. Postcard to Boston-area financial professionals and those in surrounding cities/states. We will develop a series of postcards, using variable data for those who can drive to the meeting, highlighting the close proximity.
5. Flyers. A flyer, plus the registration brochure, will be placed in all new member packages with a specific call to action, such as "register at the early bird rate" just because they are a new member.
6. Ride-along flyer/postcard or extra brochures in all product purchases. Every time that a product is purchased and shipped, before the meeting a flyer or postcard about the event will be included in the package.

C. Website & Social Media

1. Banner ads/special messages. ABCD's home page will feature rotating messages about the conference that correlate with those being communicated in the e-mails.
2. Flickr. We will place images from last year's conference on Flickr and link it to the website so visitors have the opportunity to see what takes place.

3. Facebook & Twitter. Conference pages will be set-up on both of these sites and regularly updated with key information.

D. Additional Tools

1. Signage. Save the date signs will be created for chapters to display at events leading up to the conference date.
2. Talking points. The “About ABCD” association PowerPoint presentation will be updated to include slides and messages about the conference.
3. Telemarketing. Personal phone calls are an excellent way to communicate reminder messages about the conference to key audiences. This technique will be used around key deadlines, such as the early bird discount or the hotel cut-off date.
4. Ads – print and website. We will research the opportunity to place ads on specific Facebook pages; in addition, ads will appear in targeted magazines and journals the core audience reads.
5. Word-of-mouth ambassadors. We will identify 10-15 ambassadors for the ABCD Annual Meeting—those who have attended many years and know the value---to help drive attendance through word-of-mouth strategies. This may include:
 - Recording audio and video testimonials that can be placed on the website
 - Distributing an e-mail to their contacts on our behalf (we would write the copy)
 - Making peer-to-peer phone calls to key members who have not registered. Each ambassador would be asked to make 25 calls and a script would be provided.
 - Sharing meeting information with their peers.

We will send each ambassador an e-mail from ABCD’s CEO asking them to participate in this effort. And, for those who agree, a follow-up e-mail or script will be sent to them for distribution to their contacts.

VI. Media Relations

1. Media outreach. We will contact select reporters in advance and invite them to attend the meeting and to participate in a background briefing about the organization either onsite or prior to the meeting.

2. Calendar listings. We will identify related publications and websites where we can list the dates and location of the conference.
3. Press release and follow-up calls. As information about the conference changes (new speakers, sessions, etc.) or new research is scheduled for release at the event, we will determine if a press release needs to be issued.

VII. Timeline & Budget

Budget is estimated at \$20,000; campaign to launch February 1, 2010.

VIII. Evaluation

Success of this campaign will be measured by:

- Attendance rates by specific target audiences outlined in the plan
- Increase in registration by key dates (early bird, hotel cut-off)
- Increase in website traffic
- E-mail open rates
- Anecdotal comments received from telemarketing and peer-to-peer calls
- Media outreach success, based on number of interviews or amount of coverage.

Five Tried & True Tips for Your Marketing Effort

1. Know your audience: message, vehicles and offer
2. Integration: Make sure PR, marketing and business development teams are working together – this will maximize resources, save costs, make efforts stronger. Make sure the message is woven into marketing, PR and business development efforts – you're all speaking a consistent message to the same audience
3. Make it personal: An effective promotion often has to be personal. A PURL campaign, variable data, even something as simple as a personalized text message, coming from one of your chairs, or key influencers in the industry, will have a better response.
4. Influencers matter: Are you maximizing your influencers both internally and externally?
5. Monitor, measure, modify: Test new packages/communication tools and measure for effectiveness. Modify throughout the campaign as necessary.