

Media Trust's Digital Marketing Strategy Toolkit

We created the Digital Marketing Strategy Toolkit as part of our Digital Leadership Programme funded by the Department for Digital, Culture, Media & Sport. The four templates within the toolkit were designed to guide charities through the stages of implementing a digital marketing strategy.

It's best to work through the toolkit in this order:

1. Start by understanding your audiences through the [Audience Persona Template](#).
2. Think about the journeys that different audiences will go through when interacting with your charity. Use the [Journey Mapping Template](#) to map out each persona's interactions.
3. Set and work towards goals to help you make your digital communications more effective with the [Digital Objective Builder Template](#).
4. Bring this all together in the [Digital Marketing Strategy Template](#).

You will find details below on how to work your way through completing each template.

How to use the Audience Persona Template

A great way to start the process of audience understanding is through creating personas. Personas are fictional characters used to represent the audience groups that interact with your charity in a similar way. They help you bring your audiences to life by giving them faces and names.

Time: In a group it will take you 90 minutes to create a first set of personas (3-5). If you're flying solo it is possible to use your existing knowledge and assumptions to create a persona. Give yourself 20 minutes per persona.

Resources: Print-outs or digital copies of the Audience Persona Template; biros and coloured pens; magazines and glue sticks (optional); data on your audiences from Google Analytics and social media insights.

Team: We suggest 4-8 people who work or volunteer for your charity and have a good understanding of your beneficiaries, supporters and other stakeholders. If that is not possible completing them yourself is perfectly fine.

1. Brainstorm the audience groups that you can create personas for. Think about the roles they play for your charity, the goals they want to meet and the characteristics they share.
2. Work in pairs to fill out one Audience Persona Template for each audience group.
3. Once you have completed templates for each audience group, present them to the rest of the group and add any additional information.
4. Review your personas at least once a year and update any details that may have changed.

Template headings explained:

- **Name:** Giving each persona a name will help you personalise the character and make it easier to refer to them in the future.
- **Picture:** Find a photo in a magazine, newspaper, or online that represents the persona. Or you can draw something.
- **Role:** Capture the specific role they play for your charity.
- **Facts:** Basic demographic information — age, gender, location.
- **Relationships:** Think about family, friends and professional connections.
- **Activities:** What do they do on a day-to-day basis? Include work, hobbies and habits.
- **Digital behaviour:** Their preferred social media channels, news and shopping websites.
- **Wider world:** What positive and negative trends in society affect and/or preoccupy them?
- **Feelings:** How do they feel at this point in time?
- **Drives:** What is pushing them towards your charity?
- **Goals:** What do they want to achieve through your organisation?

How to use the Journey Mapping Template

The Journey Mapping Template will help you understand how your audiences interact with you online.

Once we've developed a set of personas, we can view them as representing audience groups at a single point in time — e.g. Michelle is looking for information on her partner's health condition; Usman hopes to run a marathon to raise money for a meaningful cause. In reality, individuals are always moving through the world and changing as they do so.

The template helps us understand how each of the audience groups we create personas for will change over time. Use what you discover through the process to make improvements to all of your digital marketing channels.

Time: 90 minutes to create journeys for all your personas (3-5).

Resources: Print-outs or digital copies of the Journey Mapping Templates; biros and coloured pens; magazines and glue sticks (optional) and data on your audiences from Google Analytics and social media insights.

Team: We suggest 4-8 people who work or volunteer for your charity and have a good understanding of your beneficiaries, supporters and other stakeholders. If that is not possible completing the template yourself is perfectly fine.

1. Work in pairs to fill out one Journey Mapping Template for each persona.
2. Once you have completed templates for each persona, present them to the rest of the group and add any additional information.
3. Review your journeys at least once a year and update any details that may have changed.

Template headings explained:

- Persona name: Bring persona names over from the [Audience Persona Template](#).
- Persona role: Also include the 'role' you gave each persona here.
- Persona thumbnail: Use a similar image from a magazine as you did on the Audience Persona Template, or draw a picture.

How to use the Digital Objective Builder Template

The Digital Objective Builder template asks you questions on your organisational and digital activity to create a Specific, Measurable, Achievable, Realistic and Time-bound (SMART) objective for you to work from.

What is a digital objective?

Digital objectives serve your organisational objectives. Your digital objective will look like this:

[Charity name] wants to [organisational objective] to do this we will [digital objective] increasing/decreasing [activity] by [x%/ actual number] on [our current baseline] by [date].

We will measure this through [measurement tool]. To do this we will set up [any systems or processes that need to be established]. [staff member name] will be responsible for this objective being met, supported by [staff or volunteers who are involved].

Time: 1-2 hours (depending on size and complexity of the organisation).

Resources: Print-outs or digital copies of the Digital Objective Builder; biros and coloured pens; post-it notes.

Team: We suggest working with at least one other member of your team to populate the template. Ideally, you would bring together the team of staff and volunteers who will be involved in the delivery of your plan so they can share their ideas. If that is not possible completing them yourself is perfectly fine.

Strategic information: What organisational objective does your digital objective sit within? e.g. increase income, develop and deliver services, raise awareness, change behaviour, work more effectively internally.

Getting it done:

- What measurement tool will you use to track this objective?
- Are there any new systems or processes that need to be established to help you meet your objective?
- Who will be responsible for the objective being met?
- Who will support this person (staff and/or volunteers)?

The most important thing is to take insight from your data to make positive improvements. You should track and report on progress against your objective regularly and take action to make sure you stay on track. You can set multiple objectives for your digital work. We'd recommend no more than five.

How to use the Digital Marketing Strategy Template

The Digital Marketing Strategy Template will help you think through your digital marketing and communications activity in a more planned way.

Below you'll find the steps to completing the template. We've also provided an example from a small arts charity called [Trajectory Theatre](#), so you can see what your completed template should look like.

Time: 1-2 hours (depending on size and complexity of the organisation).

Resources: Print-outs or digital copies of the template; biros and coloured pens; post-it notes; [Persona templates](#) (could be completed in advance).

Team: We suggest working with at least one other member of your team to populate the template. If that is not possible completing them yourself is perfectly fine.

Template headings explained

- **Responsible:** The person who will be carrying out the majority of the digital marketing activity and coordinating other staff and volunteers to contribute content for digital channels.
- **Accountable:** A senior staff member or trustee who will 'sponsor' digital marketing activity and support the responsible person, receiving reports on progress to ensure things stay on track.
- **Persona:** Your audiences should be at the heart of your digital marketing. Use the [Persona Template](#) to develop an understanding of your different audience groups.
- **Messaging:** A busy charity will have many messages to communicate. List a maximum of your five most important messages in order of priority. Think about what you want people to think, feel, say and do about your organisation. You may choose to link certain message with a certain audience.
- **Channels:** You can think about three different types of channels:
 - Owned — channels you control completely where you can provide the most value (e.g. website).
 - Earned — channels you can occupy a position on and engage people (e.g. social media).
 - Paid — channels you could pay to appear on and use to recruit people (e.g. Google Ads).
- **Landing Page:** Plan the website destination for your priority message or campaign. Send people here from social media, email and any digital advertising. As you will have multiple landing pages for different campaigns and events over the year, you can use this format again to plan important new pages on your website.
 - Location — Where the page lives online. On your website, social media, or a partner's site.
 - Title — Name of the page.
 - Call to Action — What you want people to do as a result of interacting with this content. Try to stick to one action for your audience to take.
 - Hero Content / Hub Content / Help Content — Consider content that will have an impact and content that will answer your audience's questions.

- Image / Video Assets — Plan what images or graphics you will use on the page and whether you can make a video to help communicate your message.

- **How will you measure?:** Digital marketing channels will give you plenty of data on how your content is performing. Start with the basic measurement tools, e.g. Google Analytics, Facebook Insights and the stats from your email marketing system (e.g. Mailchimp).
- **What are your goals?:** Your measurement tools will help you see whether you're on track to meet your digital marketing goals. Our [Digital Objective Builder](#) will help you set targets.
- **What will you test?:** Digital is great for testing and learning about your audiences and what types of content and communication work for them.
- **Budget:** If you find in-kind support through one of your corporate partners, register for the Google Ad Grants programme, or set aside a small budget to test out Facebook Advertising, you can record it here.
- **Risks and Mitigations:** There are risks associated with any plan, or new way of working. What things do you need to bear in mind when delivering on your strategy? What actions could help to mitigate the risks?