

GRAPHIC MARKS

Nonprofit Marketing Planning Checklist

A simple planning framework for connecting mission, audiences, campaigns, content, channels, budget, and measurement.

Built for small teams that need clear, practical marketing decisions without unnecessary complexity.

Use this at the beginning of the year, before a major campaign, or when your communications calendar has become a collection of disconnected requests.

1. Define the Outcomes

- [] **Primary goal** - What must marketing help the organization accomplish?
- [] **Audience action** - What should people do: donate, join, register, volunteer, apply, share, or contact?
- [] **Success measure** - Choose 1-3 measures that indicate meaningful progress.
- [] **Deadline** - Identify the dates that genuinely affect the campaign.

2. Prioritize Audiences

- [] **Primary audience** - Who matters most for this effort?
- [] **Secondary audience** - Who can influence or support the primary audience?
- [] **Audience insight** - What does each group care about, need, fear, or misunderstand?
- [] **Message difference** - How should the value proposition change by audience?

3. Build the Campaign System

- [] **Landing page** - One clear destination explains the action and value.
- [] **Email sequence** - Plan launch, proof, reminder, deadline, and follow-up messages.
- [] **Social content** - Use channel-specific posts instead of copying email text.
- [] **Partner toolkit** - Provide share-ready language and graphics where relevant.
- [] **Leadership voice** - Identify where executives or subject-matter experts should add perspective.
- [] **Offline needs** - Include print, signage, event, or direct-mail materials if they support the audience.

4. Content Sources

- [] **Program stories** - Real examples show what the mission looks like in practice.
- [] **Impact data** - Use verified numbers and explain why they matter.
- [] **Research + reports** - Turn long-form work into useful smaller pieces.
- [] **Expertise** - Capture staff, board, partner, and community knowledge.
- [] **FAQs** - Answer the questions that repeatedly slow decisions.

5. Capacity + Ownership

- [] **Campaign owner** - One person coordinates the work.
- [] **Approvers** - Limit unnecessary approval layers.
- [] **Internal capacity** - Be realistic about writing, design, web, and email time.
- [] **Outside support** - Identify specialist work before the deadline becomes urgent.
- [] **Automation opportunities** - Automate reminders, routing, reporting, and repeatable handoffs.

6. Budget

Area	Planned	Actual
Staff / contractor time	\$	\$
Creative + production	\$	\$
Website / landing pages	\$	\$
Email / CRM / tools	\$	\$
Paid media	\$	\$
Print / signage / direct mail	\$	\$
Events / partnerships	\$	\$
Contingency	\$	\$

7. Measurement + Review

- [] **Baseline** - Record current performance before launch.
- [] **Conversions** - Track the meaningful action, not only clicks.
- [] **Channel performance** - Identify what actually drives qualified action.
- [] **Monthly review** - Adjust messaging, spend, or content based on results.
- [] **Post-campaign learning** - Document what should be repeated, changed, or stopped.

Need more marketing capacity?

Graphic Marks works with nonprofits as an extension of the team across websites, campaigns, content, search, creative, and automation.

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