

HOW TO HIRE A PARTNER AGENCY

For Nonprofit Marketing
Success

y@delpop



Presenter

Camille Winer

Co-Founder & Partner at Yodelpop

- *Yodelpop co-founder and partner*
- *Background: marketing, creative direction, web experience, strategy, sustainable business*
- *Something about me: I brew my own kombucha*



Session Agenda

Hiring An Agency Partner

- ⇒ Assessing Marketing Needs
- ⇒ Why Hire A Partner Agency?
- ⇒ Criteria for a Successful Partnership
- ⇒ What to Expect During Onboarding
- ⇒ Signs of a Successful Engagement

We Need Marketing

Help!

- Don't have a marketing strategy
- It's hard to implement strategy
- Reinventing the wheel every year / quarter / month / week / day
- Not enough capacity
- Board is skeptical...no ROI
- Not sustainable



Where.
Do.
We.
Start.



What are the organization's **objectives**
that **require marketing** in order to
achieve them?

Objectives that require marketing

- “Generate \$X from training”
- “Sell 900 training seats”
- “Expand our impact”

Take this time to translate those into specific goals.

OBJECTIVE	SPECIFICS
Revenue goal for this objective area this year >>	
Number of people (attendees, donors, etc.) >>	
Expand our impact >>	

What have
we been
doing and /
or currently
doing?



CONTENT



Start by benchmarking where you are now:



Start by benchmarking where you are now:

● Activities



Current activities

Content / SEO efforts >>	
Social media >>	
Email marketing >>	
Advertising >>	
Website user experience >>	
Conversion efforts >>	
Sales efforts >	

The background image shows a person's hands interacting with a glass wall covered in project planning materials. One hand holds a red marker, and the other holds a yellow sticky note labeled 'PLAN' with 'SEO' written next to it. The wall features a large 'BIG PROJECT' title, a pie chart with '30%' and 'MARKET SHARE', a '2 YEAR' timeline, a 'DESIGN' section with 'WEB.' and 'APP/URL', a 'DIGITAL MEDIA' section with icons for a screen, a play button, and a speech bubble, and a list of 'PRODUCT', 'SERVICE', and 'QUALITY'. There are also sticky notes for 'CONCEPTS', 'TIME LINE', and a quarterly list (Q1-Q4).

Start by benchmarking where you are now:

- Activities

- Spend

Current marketing spend

Vendors / contractors >>	
Social media advertising budget / PPC >>	
Web hosting	
CRM	
Email marketing platform	
Marketing automation	
Fundraising / membership platform	
Integrations	

The background image shows a person's hands interacting with a glass wall covered in project planning materials. One hand holds a red marker, ready to write on a yellow sticky note labeled 'CONCEPTS' with sub-points 'A' and 'B'. The other hand holds a yellow sticky note labeled 'PLAN' with a numbered list '1.', '2.', '3.'. The glass wall is also covered with other sticky notes: a large 'BIG PROJECT' note with a pie chart showing '30%' and a '2 YEAR' timeline; a 'DESIGN' note with 'WEB.' and 'APP/URL' icons; a 'DIGITAL MEDIA' note with icons for a screen, a play button, and a speech bubble; and a 'PRODUCT' note with 'SERVICE' and 'QUALITY' sub-points. A 'TIME LINE' note with a clock icon is also visible. The overall scene suggests a collaborative and dynamic planning process.

Start by benchmarking where you are now:

- Activities
- Spend
- Results

Current results

"Customers" per month >>	
Traffic per month >>	
Leads per month >>	
Visitor-to-lead conversion rate >>	
Lead-to-"customer" conversion rate >>	

The background image shows a person's hands interacting with a glass wall covered in project planning materials. One hand holds a red marker, and the other points at a yellow sticky note labeled 'PLAN' with 'SEO' written next to it. The wall is covered with various diagrams and notes: a large 'BIG PROJECT' title at the top left, a pie chart with '30%' and 'MARKET SHARE' nearby, a '2 YEAR' timeline, a 'DESIGN' section with 'WEB.' and 'APP/URL' icons, a 'DIGITAL MEDIA' section with icons for a screen, a play button, and a speech bubble, and a list of 'PRODUCT', 'SERVICE', and 'QUALITY'. There are also notes for 'CONCEPTS' and 'TIME LINE'.

Start by benchmarking where you are now:

- Activities
- Spend
- Results
- Needs

What we'll need to to achieve our goals

Equivalent of X marketing people >>	
Social media advertising budget / PPC >>	
Web hosting	
CRM	
Marketing & sales automation	
Fundraising / membership platform	
Integrations	

Assessing Marketing Needs

Poll

Assessing marketing needs:



Assessing marketing needs:

● Goals



Goals require scaling marketing efforts

- Revenue budget expectations
- Increase numbers of people to be served
 - Fee-for-service training
 - Consulting
 - Membership
 - Events
 - Donations
- Other organizational targets that require marketing in order for them to be achieved



Assessing marketing needs:

- Goals
- Timeline



Specific
timeline
needs to
meet org
goals

How does achieving or not achieving goals affect the organization?



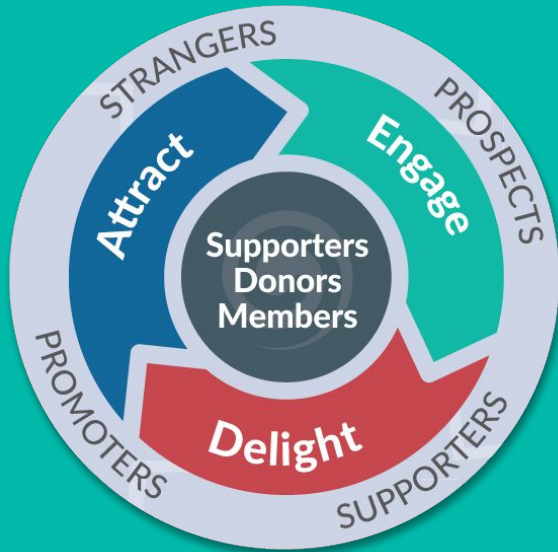
What if ... we do NOT achieve our goals?
What if ... we DO achieve our goals?

Assessing marketing needs:

- Goals
- Timeline
- ROI



What does success look like?



- We're meeting (or exceeding our goals)
- Creating alignment among internal stakeholders
- Building a scalable strategy
- Create a seamless experience across the entire customer experience
- Program that is sustainable
- Demonstrate marketing effectiveness (ROI)

Assessing marketing needs:

- Goals
- Timeline
- ROI
- Capacity



Build marketing and sales capacity

- Branding
- Web UX / UI
- Content / SEO
- Social Media
- Email Marketing
- Advertising
- Sales Alignment
- Processes / Systems

UM...about
capacity...



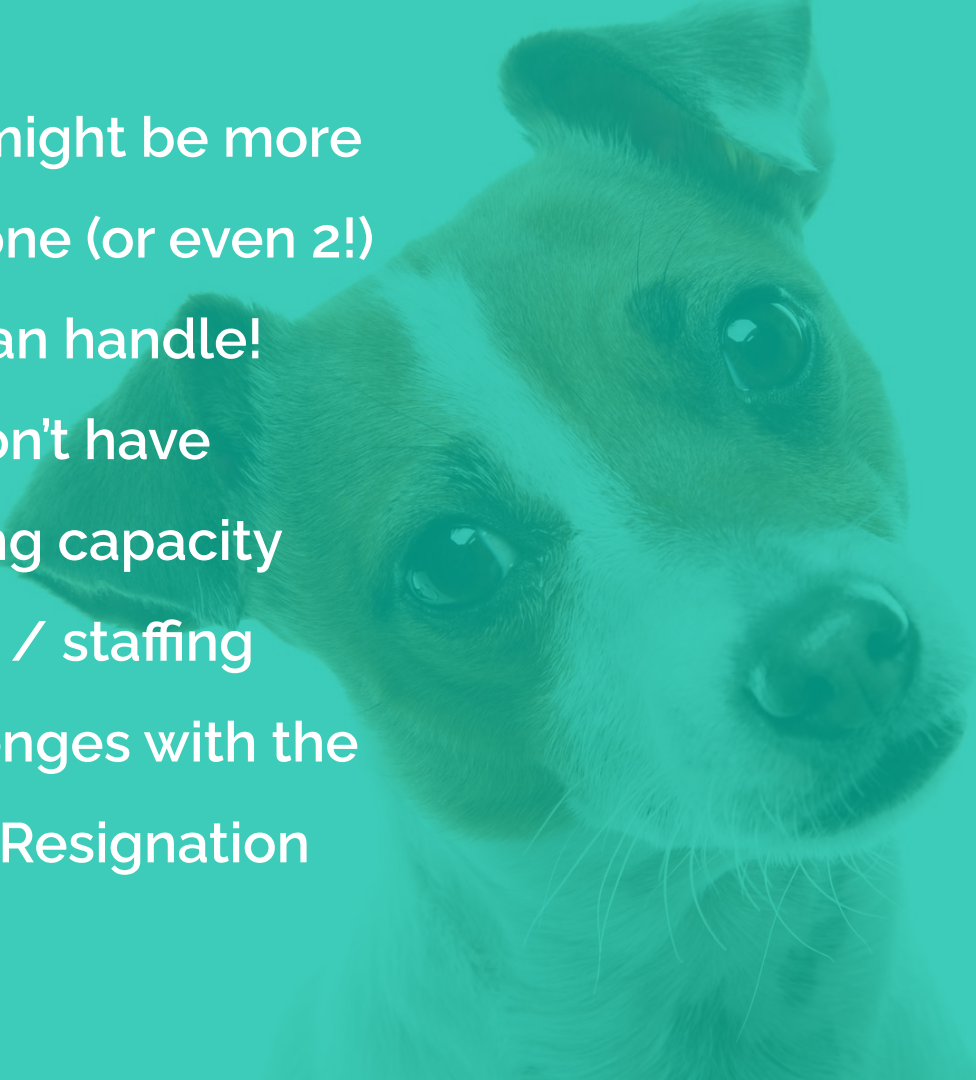
- That might be more than one (or even 2!) FTE can handle!



- That might be more than one (or even 2!) FTE can handle!
- We don't have existing capacity



- That might be more than one (or even 2!) FTE can handle!
- We don't have existing capacity
- Hiring / staffing challenges with the Great Resignation



Hiring A Partner Agency



Hiring FTE:

Digital marketing manager*

- \$83,250

Social media manager*

- \$60,250

SEO/SEM specialist*

- \$65,750

Marketing automation specialist*

- \$61,250

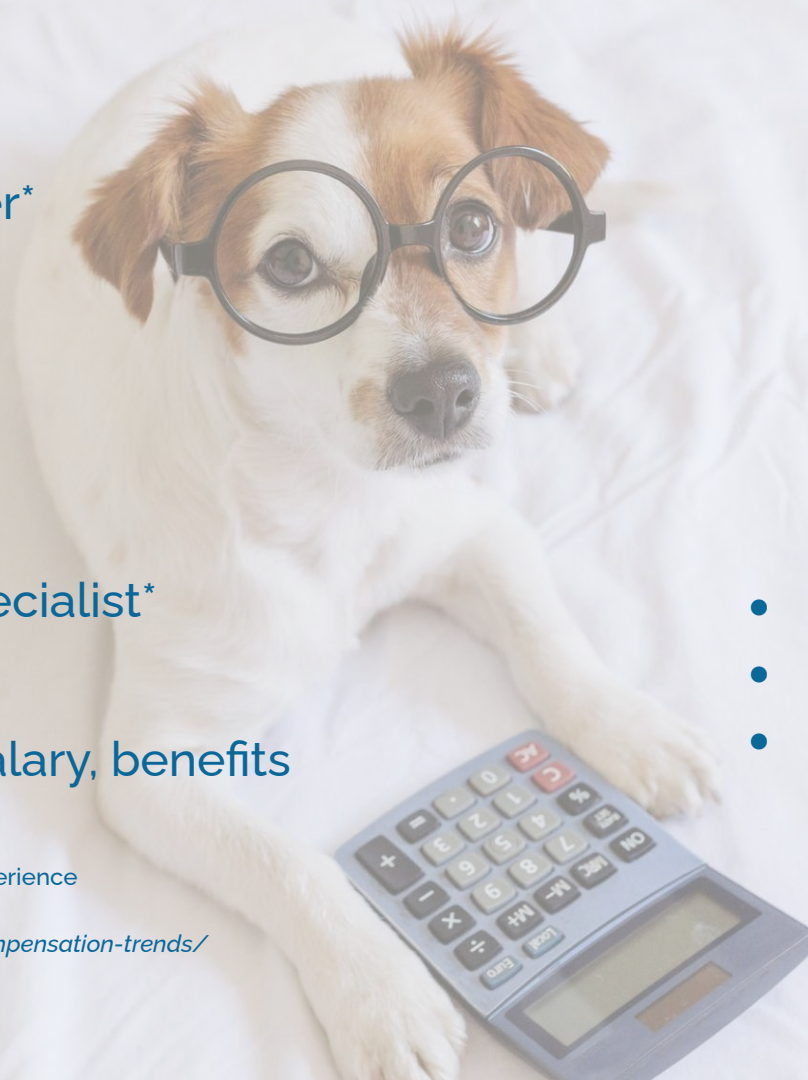
Total - \$270,500** + salary, benefits

- Copywriters
- Designers
- Web developers

*For people in moderate demand with average experience

**Robert Half's The Creative Group 2021 Salary Guide

<https://www.ama.org/marketing-news/2021-us-compensation-trends/>



Benefits to hiring a partner agency:

- Full stack team



Full spectrum of agency's specialists working together

- Strategy
- Content creation
- Web UI / UX
- SEO
- Social media
- Email Marketing
- Advertising
- Sales Alignment
- Technology / Integrations

Benefits to hiring a partner agency:

- Full stack team
- Strategy



Proven methodologies and processes

This flywheel illustrates the phases of the supporter journey:

1. Attract
2. Engage
3. Delight

And shows the stages of a supporter:

1. Strangers
2. Prospects
3. Supporters
4. Promoters



**Keep the wheel
spinning to advance
your mission!**

The inbound marketing flywheel is about:

- **Attracting** your ideal supporter / donor / member
- **Engaging** them, converting them into leads and nurturing those leads into engaged contacts
- **Delighting** stakeholders so they share their positive experiences with others, and continue to engage with your organization

Benefits to hiring a partner agency:

- Full stack team
- Strategy
- Experience

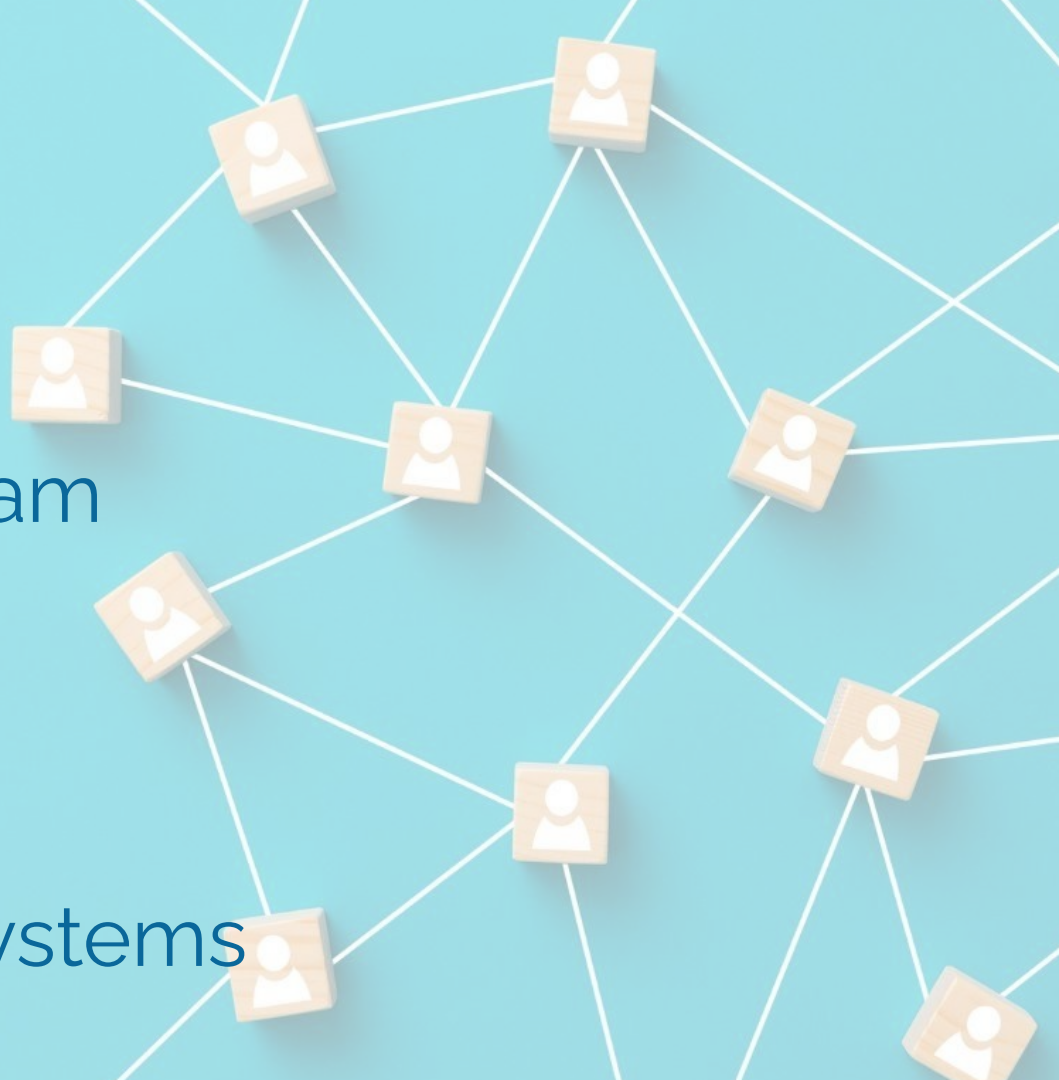


Full spectrum of agency's experience & perspective

- Niche
- Best practices
- Research
- Industry standards
- Repeated experiences
- Industry perspective
- Efficiency
- Sales & marketing alignment
- ROI

Benefits to hiring a partner agency:

- Full stack team
- Strategy
- Experience
- Process & Systems



Processes, tools & systems

- Account management
- Project Management
- Automation / Software
- Tools
- Software expertise
- Integration expertise

Big wins!



Big wins!

Example: Medical research foundation*



Big wins!

Example: Medical research foundation*

- Website Traffic: +75% mo increase
- Leads: +55% mo increase
- Donors: +2,000 increase

*<https://www.yodelpop.com/case-studies/rare-disease-foundation-grows-donor-base-with-inbound-marketing>



Marketing automation specialist*

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Social media manager*

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SEO/SEM specialist*

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Agency team 1 year:

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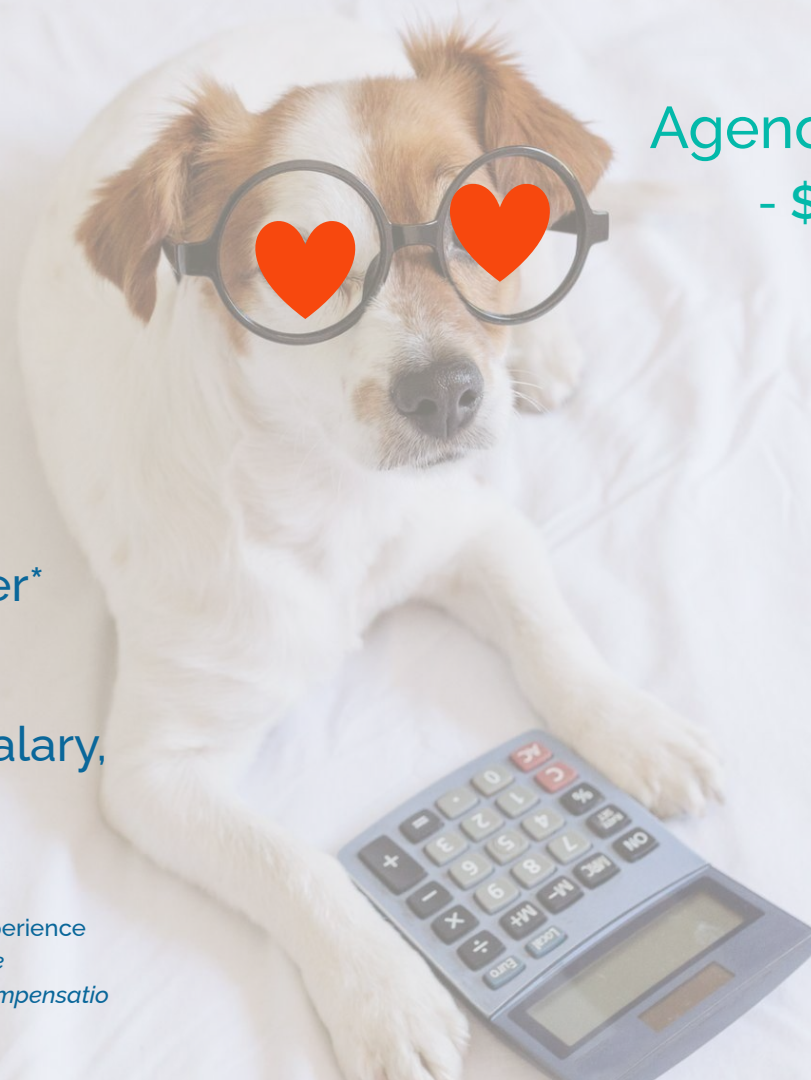
Agency team 1 year:

- \$70K - 80K

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...z^z

How to hire a partner agency

Steps toward finding the right agency

- Ask for referrals
 - Colleagues / other organizations
 - Social media pages
- Internet search
- Marketing software partner agency network
- RFP....


.....wait

NO!

NO!

NO!

ROP



Requests for proposals are ineffective

- Wastes hours and hours of time – for all stakeholders involved
- Pages and pages of rigid, cumbersome specs
- One-way dialogue
- Skips goal-oriented sales process
- Skips crucial discovery
- Missing valuable perspective & analysis
- Assessing rapport / good fit
- Underestimated / incomplete scopes

Steps toward finding the right agency

- Ask for referrals
 - Colleagues / other organizations
 - Social media
- Internet search
- Marketing software partner agency network
- ~~RFP~~...**Request 15 minute connect calls (vs. 15 hours putting together the 35 page RFP)**
- ~~Freelance directories~~

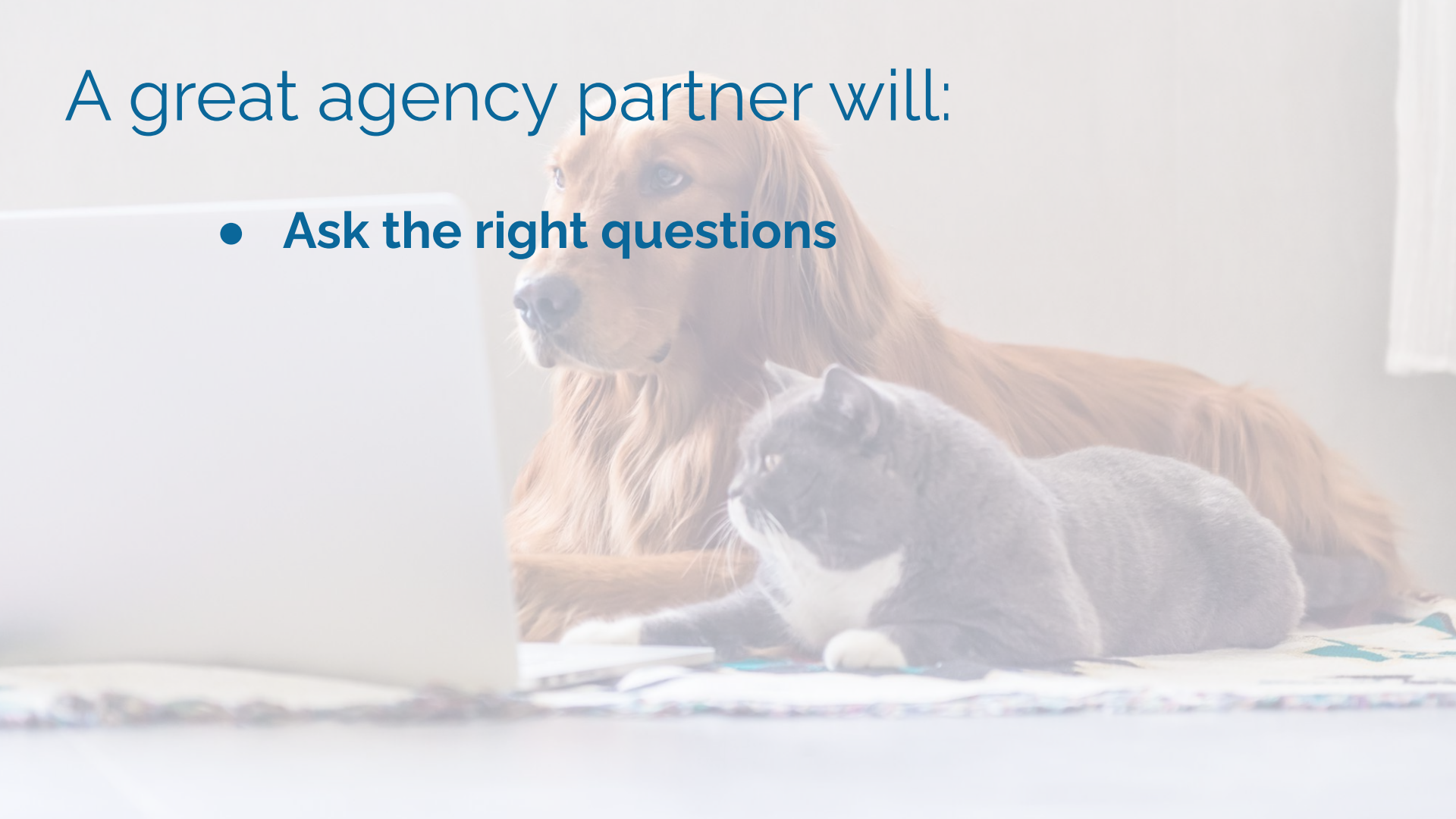
What to look for in a partner agency

A great agency partner will:



A great agency partner will:

- **Ask the right questions**

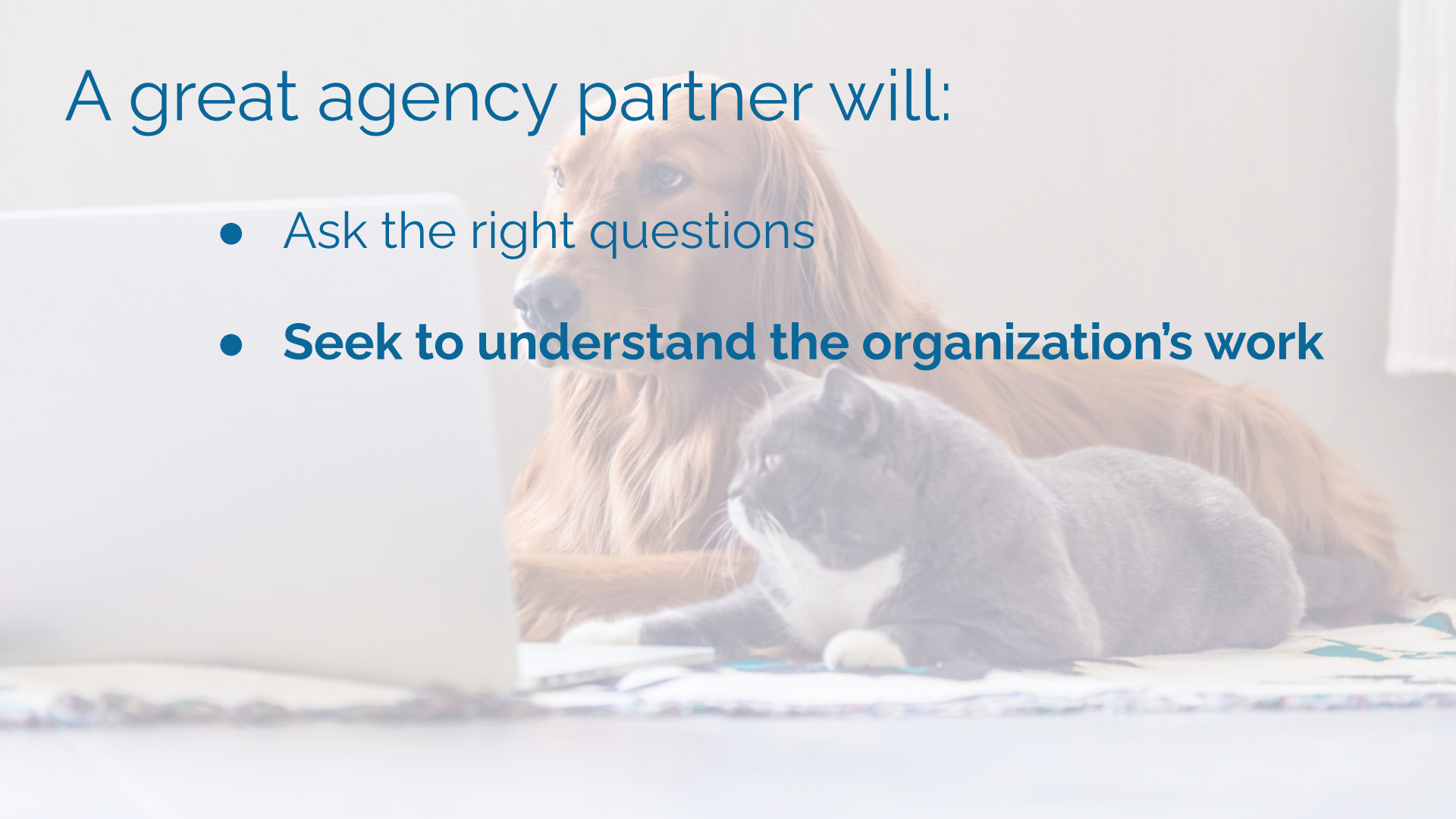


Discovery questions

- What are your goals?
- What are your current efforts toward goals?
- What's working?
- What are your challenges?
- What's your timeline?
- What is your internal capacity?

A great agency partner will:

- Ask the right questions
- **Seek to understand the organization's work**



Understand the organization's work

- Can discuss your mission
- Understanding of stakeholder value
- Knows your “product” or “service” and how it serves community / society
- Get's the audience

A great agency partner will:

- Ask the right questions
- Seek to understand the organization's work
- **Speak your language**



Speaks your language

- Understanding of nonprofit space
- Understanding of internal and external stakeholders
- Understanding the needs of the audience
- Has a handle on how marketing and sales applies to the nonprofit sector
- Experience working with a board
- Experience creating nonprofit content

A great agency partner will:

- Ask the right questions
- Seek to understand the organization's work
- Speak your language
- **Have what it takes to help meet the needs**



Has capacity and competency

- What is their marketing approach?
- Are they current within the marketing landscape (inbound? flywheel? sustainable?)
- What experience do they have working with nonprofit organizations?
- What is their specific skill set and experience?
- What is their level of expertise with marketing technology?
- What is the reputation of the agency?
- Do they have case studies and testimonials?
- Can they provide references?
- Do they provide data to demonstrate results / ROI?

A great agency partner will:

- Ask the right questions
- Understanding of the organization
- Speaks your language
- Have what it takes to help meet the needs
- **Be a good fit for your organization's culture**

Good fit for culture

- Do they share in a vision to build a better world?
- What is their approach to working with clients?
- What's their own culture like?
- How do other organizations describe them?
- What is their methodology?
- What is their communication style?
- How to they present themselves in their own branding and marketing

What to Expect During the Onboarding Process



Activities that set the stage for a successful engagement

- Warm welcome!
- Thorough discovery
 - Personas / audience = #1!
 - Alignment on sales & marketing goals
 - Content audit
- Present a clearly defined strategy
- Systems assimilation
- Developing rapport
- Collaboration
- Clear delivery plan
- Quick wins!
- Execution



Signs of success

You'll know
you made the
right decision
when there's...

- Regular & effective communication
- Execution of marketing assets
- Ongoing collaboration
- Trust building
- Balance of consistency & flexibility
- Shared ownership



Recap - Hiring to fill capacity for marketing

1. Alignment on organization's objectives and the need for a marketing strategy
2. Benchmark where your marketing program is now
3. Assess your goals and what marketing activities are needed to meet those goals
4. Assess capacity
5. Assess hiring needs
6. If considering an agency, take time to work through a sales process with them
7. Take the time to fulfill capacity needs sustainably



The way **TO ACHIEVE
GOALS** is to take one step
at a time.

NONPROFIT MARKETING PLAN WORKSHOP

With Our Proven Gameplan Process

Register for a Session



Create a scalable
marketing plan
that you can
begin to carry out
right away

yodelpop.com/nonprofit-marketing-plan-workshop



Questions?
Comments?

Contact
camille@yodelpop.com