

MARKETING FOR CONSERVATION SUCCESS

**AN EASY-TO-USE-WORKBOOK
FOR MARKETING
CONSERVATION SERVICES**

PRODUCED BY

NATIONAL ASSOCIATION OF CONSERVATION DISTRICTS

**IN COOPERATION WITH
NATIONAL ASSOCIATION OF STATE CONSERVATION AGENCIES
USDA NATURAL RESOURCES CONSERVATION SERVICE**

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All programs and services of these groups are offered on a non-discriminatory basis without regard to race, color, national origin, religion, sex, age, marital status, or handicap.

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INTRODUCTION TO MARKETING

More than ever, our communities, state leaders and national leaders look to the partnership of conservation districts, state conservation agencies and the Natural Resources Conservation Service for help. They understand that our technology and conservation programs offer practical, proven solutions for resolving environmental issues in today's dynamic world.

But today's world of tight budgets and a wider diversity of people who are interested in our work, requires more creativity in how we work with people—our customers—to meet their needs.

The benefits of our technology and programs, and how they help solve environmental issues, must be stressed in different ways with many types of customers—agricultural, environmental, legislative, business and others who can benefit by working with us.

This *Easy-to-Use Workbook for Marketing Conservation Services* will help the conservation partnership meet customer needs through "marketing."

OBJECTIVES OF THIS WORKBOOK

The purpose of this workbook is to provide the members of the conservation partnership at the local level with the tools needed to:

1. Understand and use the marketing process
2. Develop or improve marketing skills and techniques through case study examples
3. Develop marketing plans for promoting our technology and conservation programs to help solve environmental issues

The real-life case study examples from conservation partnerships throughout the U.S. in this workbook will help local conservation district officials and employees, state conservation agency employees, state conservation district association leaders and employees from the Natural Resources Conservation Service (NRCS) at all levels. Other partners can also benefit from this workbook.

WHAT IS MARKETING?

Mention the work "marketing" and some people immediately see smooth-talking salesmen in plaid sport coats persuading customers to buy a used car with slick high-pressure pitches.

Many others think of marketing as a complicated and confusing mixture of mind reading and magic wand waving to come up with an arbitrary plan of action.

Marketing, however, has nothing to do with these old cliché images. Marketing is NOT forcing unwanted products on wary customers. *Instead, marketing involves asking customers what they need and providing products or services which meet those needs.*

Marketing doesn't have to be a complicated procedure. *Marketing is a straightforward step-by-step process which anyone can learn and use.*

HOW CAN MARKETING CONSERVATION HELP THE PARTNERSHIP?

Marketing will help us:

- Meet customer needs
- Strengthen the capacity of the conservation district, state conservation agency, and NRCS partnership at the local level
- Expand our conservation partnership to be more effective by forming alliances with groups who share our issues
- Anticipate and address conservation issues at the local, state and national level
- Deliver the right service to the right customer
- Increase public support

The sample worksheets with case study examples will guide you through a seven-phase process to develop an effective marketing plan. The blank worksheets in Appendix B are for you to photocopy and use as you develop your own plan.

A thought: Marketing is a team effort. To get everyone involved, consider having a different member of the team lead each phase.

PHASE 1– IDENTIFY CRITICAL ISSUES

Conservation programs developed in the past may not address all of the environmental issues your partnership deals with today. Therefore, determining your critical issues is the first step in effective marketing.

This phase of marketing will help you identify critical issues for your partnership and how you might respond to them.

WHAT IS AN ISSUE?

A conservation issue is any topic related to the conservation of natural resources that can affect land users or other customers of the partnership. The variety of customers your partnership serves will be specifically identified in Phase 3, so for now consider customers in a broad sense.

The issues your office deals with may likely relate to:

- A community issue such as how to improve water quality in a watershed.
- The partnership's voice on national/state/county issues relating to natural resource

conservation, such as addressing the issue of voluntary versus mandatory conservation.

- A Food and Agricultural Council's goal or priority, such as providing convenient one-stop shopping for farmers and ranchers.
- Pending national legislation that affects your customers, such as the rewrite of the Endangered Species Act.

Examples of possible responses may include:

- Educating interest groups concerned about water quality and securing their commitment to support your position on the issue.
- Bringing together agricultural, business and environmental groups to demonstrate the success of voluntary conservation programs.
- Focusing public attention on developing a proactive ecosystem management plan that restores a critical species through managing natural resources rather than eliminating the use of natural resources.

PRIORITIZE AND FOCUS ON ISSUES

Time and resources may not allow you to address all the critical issues you identify. Prioritize them. Select the most important issue first and develop a marketing plan focused on it. Then apply this same marketing process to your other priority issues.

TASK

Stop now and review the case study in Sample Worksheet 1. This case study illustrates the steps used to create a working list of the critical issues and possible responses to those issues. It features the activities of the Clallam County Conservation District of Puget Sound in Washington state and its efforts to improve water quality and habitat for fish.

SAMPLE WORKSHEET 1

CRITICAL ISSUES–CASE STUDY

1. Select the most critical ongoing or emerging conservation issues in your community that you want to address.

Issue:



Improve the quality of water entering Sequim Bay to:

1. Return production of oysters and clams in the bay to historic levels; and
2. Improve habitat in rivers so that coho salmon production in the watershed returns to historic levels.

We need to:

1. Decrease the amount of fecal coliform entering Sequim Bay from agricultural waste and failing septic systems.
2. Provide spawning habitat for coho salmon by:
 - Creating deep pools and riffles
 - Changing straightened streams to meandering streams
 - Planting vegetation in riparian (streamside) areas
 - Developing alternative livestock water to reduce riparian grazing

Issue:

Logging small parcels of privately-owned land with improper techniques due to rapidly rising timber prices, putting harvest pressure on small acreages and causing accelerated soil erosion.

We need to:

Find alliance members that will add to our expertise, and help us work with timber owners and loggers to promote use of proper harvest techniques.

Issue:

Excessive irrigation on cropland causing deep percolation of agrichemicals and fertilizer, creating elevated nitrate levels in groundwater.

We need to:

Work with producers to reduce water usage through proper application tied to crop needs.

2. Check your highest priority issue, or combine related issues into a single issue, for which you will develop a marketing plan.

PHASE 2– DEVELOP ALLIANCES AND DETERMINE YOUR ROLE

This phase identifies other organizations that might also be involved with your critical issues and willing to contribute resources. It also helps you define your role in working with other groups.

- State fish and game wanting to improve fisheries
- Livestock groups representing ranchers and their efforts to be economically sustainable and environmentally responsible

ADD TO THE PARTNERSHIP – DEVELOP ALLIANCES

The partnership of conservation districts, state conservation agencies and the Natural Resources Conservation Service can benefit by forming alliances with other groups to tackle a common issue. For example, if the issue is water quality, these may be good groups with which to form an alliance:

- Trout Unlimited or the Sierra Club involved in streamside improvements on grazing lands
- A sustainable farming group interested in legume crops

GET INPUT FROM MANY GROUPS

The more ideas generated the better the chance for success, so include as many groups as reasonable and productive in an alliance. Share with them your response to the critical issue. What is their reaction?

INVOLVE INTEREST GROUPS

Special interest groups are a fact of life. Many groups exercise influence to accomplish their goals. Working together may help you both accomplish common goals.

TIPS FOR DEVELOPING AN EFFECTIVE ALLIANCE

- Talk with community opinion leaders and get them involved.
- Find out their views about your issues.
- Talk to community groups which have political influence. Learn their “hot buttons” and positions on key issues.
- Create a list of key contacts. This list may include organization leaders, media personnel, etc.

BUILD RELATIONSHIPS

In order to work effectively with the groups in your alliance you must be able to see the issue from their vantage point, and to describe benefits from their perspective.

How can you do this? When possible, work with groups on their issues, and support their projects. This requires an investment of time, but can yield large profits in the form of mutual understanding and cooperation.

It's important to know how the critical issues affect a potential alliance member in order to determine if they should be involved with you on an issue. Every member should have a stake in the outcome.

SHARE RESOURCES

New partners can promote your common goals, and also allow you to pool resources, which benefits everyone involved.

Think of community organizations, individuals or other groups that can contribute resources to resolving your issues. Resources can range from providing meeting space, to producing a video or publication, to providing funding for projects.

DETERMINE YOUR ROLE IN THE ALLIANCE

After identifying new alliance members, it's important to determine your role in this expanded effort to deal with your issue. This step will guide you in writing a role statement. It may be a good idea to have each of your alliance members write a role statement for this issue, too.

WRITING A ROLE STATEMENT

A role statement is a type of mission statement specific to your issue. It explains your purpose, and defines who you are and what you will do regarding this issue. Your role statement should make it easy for people to quickly grasp what unique conservation role you play.

When writing a role statement, be sure to:

- Be realistic—Consider your resources and capabilities. You want to ensure success, so keep your limitations in mind.
- Be specific—Keep role statements concise and explicit.

A good role statement should:

- Be short and to the point
- Use everyday language (no jargon or technical terms)
- Portray the character of your organization
- Use action verbs

Following is an example of a role statement:

“We provide farmers with access to voluntary, affordable technology which can help them improve water quality.”

TASK

Review Sample Worksheet 2. In this case study, agricultural producers in the watershed from which New York City draws its drinking water embarked on a bold new effort to reduce water pollution. Producers faced difficult choices. Strict regulations developed by the city and EPA; having the city buy farms and take them out of production; or forming an alliance with the city, environmental groups and many others concerned about the watershed to develop a voluntary approach to solving the problem.

The latter option was chosen. With conservation district leadership, 22 farm groups formed the Watershed Ag Council and began identifying other groups to join this alliance. The sample worksheet shows just a few of the potential alliance members.

TIPS FOR ESTABLISHING YOUR ROLE

- Be inclusive. The entire staff, board and volunteers should be able to communicate about your role statement and what it means to the conservation partnership.
- Refer to the role statement over and over again. It’s a good tool for communicating clear and consistent messages to your customers.
- Be visible. Get involved and stay active in professional networks, clubs and trade associations in your field. Tell these peers about your important conservation role.
- Know the issues and take a stand. You are a leader and an authority in your area on conservation. Be out front.
- Deliver what you promise. Consistent and reliable delivery of your conservation partnership’s services is the most crucial part in establishing your role.

SAMPLE WORKSHEET 2

FORM AN ALLIANCE/IDENTIFY YOUR ROLE—CASE STUDY

1. For the issue you circled in Worksheet 1, list other groups in your community who are also addressing this issue. What can this group provide? How will this group benefit from cooperating with us?

<u>Group</u>	<u>What they can provide</u>	<u>How alliance benefits them</u>
NYC Department of Environmental Protection	Funding & political clout for rural issues	Watershed protected—avoid having to purchase ag land
Natural Resources Conservation Service	Technical knowledge, assistance and a close working relationship with farming community	Fulfillment of mission
Upstate/Downstate Partnership	Coordination of diverse interested parties and access to their many members	Their issues and concerns will be addressed in the development of the Whole Farm Program
Watershed Ag Council	Consists of 22 farmer/agribusiness watershed leaders who can make the program work	Preserve rural way of life for agriculture and farm businesses and economic survival

2. For the issue you selected, complete the following phrases in as many ways as you can think:

a. We're the people who... can bring together ag groups, technical agencies and others to form an alliance for developing a voluntary Whole Farm Program funded by the City of New York that will protect water quality, provide viability for agriculture, and prevent stringent regulations imposed by the Federal Safe Drinking Water Act.

b. No one, but no one, can _____ as well as we do. ...support a voluntary, locally-controlled program to protect water quality and economic viability of agriculture in the New York City Watershed by getting 85 percent of the farmers living in the watershed signed up to develop a Whole Farm Program plan and implement best management practices to protect water quality.

c. We want to be seen as... a national model for developing an interagency alliance approach to protect water quality and agriculture in watersheds through a voluntary incentive-based program.

3. Now go back and circle the phrases that most strongly convey who you are and what unique role you want to play.

4. Based on the circled phrases in #2 above, and applying the four criteria for good role statements (short and to the point, use everyday language, convey character, and use action verbs), write your role statement here: We are the ones to encourage farmer participation in an interagency, voluntary Whole Farm Program with financial incentives to protect water quality and the economic viability of agriculture in the New York City Watershed, which will be seen as a national role model.

5. Test this with alliance members. Revise statement if necessary. This statement will change over time as you learn more about your alliance, customer needs or as the issue changes.

PHASE 3 – DEFINE CUSTOMERS

After identifying the critical issues, finding new partners, and determining your role in the expanded partnership, it's time to zero in on the customers who may use the services you and members of your alliance provide. Phase 3 will help you do this.

WHO ARE OUR CUSTOMERS?

A customer is any individual or group that can benefit from the services your partnership has to offer.

You may be asking, “Are they a customer or a partner?” The distinction between the two is not always clear, but if their participation results primarily in benefiting from the services of the partnership, consider them a customer.

You may tend to lump customers into categories—farmers, ranchers, environmental group members, etc. But a good marketing plan gets even more specific about customers. For a watershed where water quality is a priority issue, you may have these customers:

- Dryland small-grain farmers
- Irrigated beet growers
- Sustainable farmers using legume crops in cereal grain rotations
- Landowners with small acreages used primarily for grazing horses
- Wool producers
- Homeowners who install septic systems close to creeks
- The local Audubon chapter concerned about habitat enhancement
- A local native plant group wanting to establish natural areas
- Communities who store their water in reservoirs

Specific methods of customer “information gathering” will be covered in Phase 4 of this text, “Identify Customer Needs.”

For now, just concentrate on how background information can help you to understand and work with your customers.

TASK

Each of these customers has different needs. Talking with each is important. Remember that marketing *encourages us to talk with others outside the partnership—especially customers.*

Stop and review the case study in Sample Worksheet 3. It shows that some conservation districts have unique issues. Such is the case of the Santa Cruz County Resource Conservation District and its urban environment. There, improper road building techniques in mountainous, geologically unstable areas can cause fatal landslides and encourage the spread of wildfires.

SAMPLE WORKSHEET 3

CATEGORIES OF CUSTOMERS—CASE STUDY

1. Make a complete list of your customers for the issue you have selected.

<u>Who</u>	<u>What we want them to do for this issue</u>	<u>Benefit to them</u>
Landowners -Homeowners -Renters -Road & homeowner associations	Use technically sound road stabilization practices and revegetation techniques to prevent erosion, landslides, spread of wildfire, poor water quality and, in extreme cases, fatalities due to fire and landslides.	Creates safe environment, enhances property value, provides peace of mind.
County Planning & Public Works Dept.	Adopt our sound technical standards for revegetating road cuts as well as other erosion sediment control practices.	Assurance that they are using technically proven conservation practices that are research based.
Local water & fire districts/ California Department of Forestry	Encourage use of fire retardant and drought-tolerant vegetation near and around homes.	Greater chance that homes will not suffer damage in wildfires. Conservation of limited water supplies.
Private contractors that do road related work & suppliers of erosion control products and services.	Use technically sound erosion control techniques.	Provides homeowner or road association the best information and service.

PHASE 4 – IDENTIFY CUSTOMER NEEDS

In this phase, customers tell you about their needs concerning the issue. They provide information that will allow you to test your response to the issue, if you have the right members in the alliance, if your role statement is on target, and what service you need to provide.

GOOD SERVICE MEANS MEETING CUSTOMER NEEDS

Marketing isn't just for selling products in the business and manufacturing industries anymore. It's a way of providing service based on customer requirements.

For each issue, you need to ask customers:

- What do they need to deal with this issue?
- Do we have a service that addresses their need?
-

If we do have this service, why aren't they using it as we want them to?

- How can we make this service more accessible and convenient for them?
- How can we make them more aware of this service?

Table 4 on the next page gives you methods for obtaining answers to your questions.

REVISIT PARTNERS

After gathering information from customers and identifying their needs, ask yourselves and your partners these questions.

- Do we have services that address customer needs?

- Do others have these services? If so, are they willing to form an alliance to serve mutual customers?
- Does our conservation district/state conservation agency/NRCS partnership need to develop these services? Should the alliance develop these services? How can we gather enough resources to provide this service?
- Is the possible response we wrote for this issue in Phase 1 still on target? Do we need to revise it to reflect customer needs?

TABLE 4

INFORMATION GATHERING METHODS	
Information Gathering Method	Explanation
<input type="checkbox"/> Personal Interviews	One-to-one interviews need to be conducted. A loose series of question are asked and listening skills are used.
<input type="checkbox"/> Focus Group	Assemble seven to nine people in small groups. A preset list of questions are asked. Quick method to explore attitudes and needs of people.
<input type="checkbox"/> Survey	Question a sample of people in order to generalize responses to a larger population. There are many different types of surveys.
<input type="checkbox"/> Personal Observations	You continually make observations. If you attempt to be unbiased during these observations, they can be a valid method of gathering information. Written notes are a way of documenting your observations.
<input type="checkbox"/> Direct Mail	NRCS's Field Office Computer System (FOCS) enables use of a customer data base to pinpoint targeted group. Enables you to: ask for a particular action from the person, establish a dialogue by asking for a response, and offer satisfaction of previously stated need.
<input type="checkbox"/> Printed Materials	Publications, library documents, census data, published data bases, personal accounts, journals, magazines, newspapers, etc. can all provide valuable information about your local area.
<input type="checkbox"/> Advisory Committee	Composed of three to six individuals who are knowledgeable members of the community. These committee members are likely to have a sense of community needs, attitudes, resources, and desired services.
<input type="checkbox"/> Key Informants	Interview community members individually who have exceptional knowledge of community needs, attitudes and resources. These interviews are not conducted with a formal list of questions. They are unstructured.

TASK

- How does our role statement in Phase 2 for this issue match our customers' expectations? How do we need to revise the role statement?
- If we have a service that meets customer needs, can the alliance help us expand or improve this service?
- Can the alliance help us make this service more accessible and convenient?
- Did our customers identify other possible partners for us?
- From what your customers told you, can you combine some customer groups?
- Do you need to split other customer groups into smaller segments?

Review the case study example in sample Worksheet 4. This example illustrates the steps used to identify customer needs.

The small rural town of Holly Grove, Arkansas, developed a community improvement plan to deal with flooding from a nearby creek. This flooding hinders economic development for the community, and many residents – especially younger ones – are moving away.

Residents and community leaders in Holly Grove met in a focus group setting with the conservation partnership to outline possible solutions to these two interconnected issues.

Spending the necessary time up-front to gather customer needs will pay off big in the long run by ensuring a project's success. This type of research is what separates a complete and successful marketing plan from a haphazardly thought-out and ineffective one!

SAMPLE WORKSHEET 4A

IDENTIFY CUSTOMER NEEDS—CASE STUDY

1. For your critical issue, use information gathering techniques to answer the following questions for each customer group identified in Worksheet 2. Complete this worksheet for *each* customer category.

Customer: Residents of Holly Grove who are concerned about regular flooding, and its impact on economic and social stability of their community.

What does your customer need to deal with this issue?

- Complete the Holly Grove Floodplain Management Study and implement it this year
- Promote leadership development
- Provide employment and business opportunities in the community
- Provide affordable housing that is safe from flooding
- Develop a niche for Holly Grove, such as a regional center for outdoor recreation

What services do you offer to help customers deal with this issue?

The conservation partnership can help develop a Floodplain Management Study and provide assistance from the Resource Conservation and Development Program to address economic stability.

Why are customers not using the service as much as you like? What can you do to make this service more convenient and accessible to meet customer needs?

People are taking an active role in their community's future, but they are hindered by unnecessary red tape and community out-migration due to lack of business and employment opportunities.

What services need to be developed to meet customer needs?

To promote leadership development, the partnership will help create a Holly Grove Community Development Committee to cultivate tourism and recreational interests, and assist in grant writing training to obtain funds for community development.

Where do customers get information about this issue and the service you or your partners provide?

Through six ad hoc committees established to meet goals.

What characteristics of customers (age, income, education, etc.) will affect how you provide services regarding this issue?

Younger people, upon completing their education, are leaving for better employment opportunities. As the community development activities progress and more economic, educational and social opportunities are improved or created, young people will stay or return to the community.

2. How will you get information about customer needs? Check all that apply.

- Existing information that you already have
- Existing information that your partners already have
- Printed information from previous studies, newspaper articles, etc.
- Gather information yourself with your partners through methods on Table 4
- Hire a consultant or use a volunteer who is a professional

SAMPLE WORKSHEET 4B

IDENTIFY ALLIANCE MEMBER NEEDS-CASE STUDY

For each customer group, visit your partners to get their perspective of customers needs and how they are dealing with them. Also visit any potentially new partners/customers suggested in Worksheet 4A.

Customer: Holly Grove residents

Alliance Member(s): Holly Grove Town Council & community leaders

How do we share this customer?

Our customer looks to these partners for leadership in addressing flooding and the economic stability of Holly Grove.

What does this alliance member(s) tell you the customer needs to deal with this issue?

The community leaders say customers want flooding controlled. Possible solutions they suggested are dredging of the upstream water bodies, or relocating houses to non-flood areas.

What service(s) does this alliance member(s) offer to help your customer with this issue?

The Town Council can provide leadership in pulling the community together to find consensus on how to solve flooding problem and how to promote economic growth. The Council can formally request funding from state and federal programs to address these issues.

For this issue, how can we work together to meet customer needs and achieve this alliance member(s) goals?

The flooding problem represents just one of a host of issues the community is attempting to solve. The conservation partnership can provide technical assistance.

Housing, employment, and business and youth out-migration, are all issues that a variety of public and private organizations need to collectively address. We can join the effort to promote economic stability by exploring the Resource Conservation and Development program. The Town council is interested in learning more about RC&D.

PHASE 5 – SET A STRATEGY AND ACTION GOALS

After you have gathered and analyzed information about customer needs for your issue, you are ready to identify a marketing strategy and set action goals.

Phase 5 explains how to:

- Develop a broad marketing strategy
- Set action goals that can be measured for what you want to accomplish
- Consider factors which might impact these goals
- Adjust the goals to account for these factors

WHAT IS A MARKETING STRATEGY?

A strategy is an approach you will use to satisfy customer needs. For example, if customers who own small parcels of land in suburban areas need assistance at times other than your normal office hours, a broad strategy might be to develop videos and other informational materials they can use at their own convenience, or make your service available during evenings and/or on weekends.

Another example might be a group of irrigating farmers who want to experiment with innovative irrigation technology, but are hesitant to do it on their own for fear of economic loss. A broad strategy might be forming a local support network for those willing to experiment with new practices with minimal risk.

WHAT ARE ACTION GOALS?

Action goals state what you want to achieve and how you will define success in your marketing program. To do this, write goals that are:

Specific:

The goal is expressed in explicit, detailed terms, not general ones.

Measurable:

The goal must be measured to determine the success of your marketing effort. There are many kinds of measurements.

Some examples are in the table on the next page.

EXAMPLES OF ACTION GOALS:

“To enlist and train 30 volunteers to help small acreage owners improve 3500 acres of pasture land.”

“To reduce irrigation water waste by 25% by the end of the year.”

Your action goals are linked to your critical issue and the needs of your customers—needs which you determined in Phase 4. You will likely have multiple goals as they relate to a critical issue and different types of customer who have different needs.

SETTING ACTION GOALS

■ Start by setting your sights high

Think about the best possible results, or the ideal success, to these items. This is your initial goal. (Don't worry if this goal seems unrealistic, we'll adjust later.)

■ Consider outside factors

Now consider the outside factors (both good and bad) which could affect your ability to reach this goal, and decide how you will adjust for these factors. Examples of outside factors might include the economy, pending legislation, high turnover of properties, trends, attitudes, etc.

■ Consider your own resources

Next take a look at the resources you have (budget, staff, partner resources, volunteer time, etc.). How do these limitations affect the best possible goal you identified above?

EXAMPLES OF MEASURES:

Following are some examples of each type of measure. To explain each measure, refer to our example goal of: "To enlist and train 30 volunteers to help small acreage owners improve 3500 acres of pastureland."

Physical: Physical measures refer to acres of land improved, acre-feet of water conserved, tons of soil saved, etc. In the above example, the physical measure is the 3500 acres which would be improved.

Psychological: Psychological measures refer to customer satisfaction. In the example, the psychological measure is the satisfaction of the landowners whose land is improved, and the conservation ethic instilled in those landowners.

Awareness: Measured by the increased awareness among people in the community about a resource problem or solution. In our example, the measure is the increased awareness in our 30 volunteers, and in the landowners who participated.

Participation: Measured by the level of participation in a partnership project. In the example, the participation could be measured by the 30 volunteers and the small acreage owners.

Adoption: Measured by how many people adopt a conservation practice. In this case, the measure is by the number of landowners who adopt the training practices to improve the pastureland.

TASK

■ Formulate a realistic goal

After considering outside factors and your limitations that might affect your ability to reach the initial goal, adjust for these and come up with a realistic goal. Include time frames for accomplishing this goal.

Review Sample Worksheet 5. The case study features the broad strategy and action goals of the Montana Farm and Ranch Improvement Club alliance. The alliance consists of conservation and agricultural agencies, agricultural groups, the state's sustainable farming organization, farm media and research institutions to promote conservation technology. This worksheet should be completed for each customer group for your issue.

SAMPLE WORKSHEET 5

ACTION GOALS—CASE STUDY

1. Customer:

Farmers/ranchers wanting to try new conservation technology at minimum financial risk

2. Based on the information you've gathered from customers and alliance members, what broad strategy will you use to address this critical issue based on customer needs?

Form a network of producers who are willing to try innovative conservation practices, and provide technical assistance and incentive funding to offset seed, equipment or other costs associated with trying new technology.

3. Considering factors that may work for or against you, what is the best possible goal you can achieve in addressing this issue?

Goal: Create a network of Farm and Ranch Improvement Clubs to test new innovative technology and provide a forum for members to support each other in their experimentation—at least one club per county.

By When: January 1996

Goal: Secure at least \$100,000 of funding from a private foundation to hire a Farm and Ranch Improvement Club Coordinator

By When: March 1993

Goal: Through promotion by clubs, increase by 200 percent the amount of legume crops being used as soil-building green fallow among Montana small-grain producers.

By When: March 1996

PHASE 6 – DEVELOP AND ACTIVATE THE MARKETING PLAN

In this phase, you develop your action-oriented marketing plan taking into account all of the information you've gathered from partners and customers in previous phases.

CONSTRUCT A MARKETING PLAN

A marketing plan is the blueprint. It identifies appropriate marketing actions you and your partners will take based on the needs of your customers, partnership resources, your broad marketing strategy and action goals.

Worksheet 6 is your blueprint for your marketing plan. You will need to complete this worksheet for each customer group that you identified for your critical issue. Keep in mind that partnerships may vary with each customer group. So might your strategy.

As you develop action items, ask yourself if these actions will satisfy customer needs? Will these actions help the partnership resolve your critical issue? Do these actions effectively use the resources of the partnership?

TASK

In the case study example on Worksheet 6, the Iowa conservation partnership expanded. The partnership enlisted the support of agribusiness and conservation producers to help other farmers apply conservation on highly erodible land.

TIPS FOR DEVELOPING A MARKETING PLAN

- Assign a marketing coordinator to oversee the plan.
- Include members of the alliance/coalition in the planning process (if appropriate).

SAMPLE WORKSHEET 6

DEVELOP THE MARKETING PLAN-CASE STUDY

Critical Issue: Accelerate protection of highly erodible land

Customer: Iowa producers of corn and soybeans who are farming highly erodible land

Customer Need(s): Consistent information and assistance about crop residue management from credible sources, especially ag supply dealers and conservation farmers

Identify Partners and Alliance Members: Iowa Association of Soil and Water Conservation Districts; Iowa Department of Agriculture and Land Stewardship; Extension; agribusiness representatives; farm organizations and commodity groups; conservation groups and farm media.

Broad strategy you will use to meet this customer's needs: Form a conservation team (coalition) of people at the state and local levels to cooperatively give producers the help they need to practice crop residue management.

Action Goal(s):

- Have crop residue management used on 6-million acres of HEL by 1995
- Garner active support and promotion of soil conservation measures by agribusiness and farm organizations through establishing a cooperative team approach
- On a county-by-county basis, increase participation in farmer-to-farmer information exchange activities regarding conservation issues

<u>Activity*</u>	<u>Who</u>	<u>Cost</u>	<u>Start</u>	<u>End</u>
•Develop and promote voluntary statewide farmer-to-farmer information exchange program aimed at farming economically and environmentally	NRCS/IASWCD/ Iowa Dept of Ag and Land Stew- ardship	\$40,000/yr	1991	Jan 1995 or when assumed by other groups
•Form a conservation team (coalition) of people at the state and local levels to cooperatively give producers the help they need to adopt conservation practices	NRCS is facilitator	—	Oct 1991	To continue as long as group is productive
•Cross-train agribusiness and conser- vation employees so that a consistent conservation message is given to producers	NRCS/ Agribusiness	Estimate \$10,000*	Oct 1991	Jan 94 for primary work, but to continue as appropriate
*Note: Actual plan had many more activities		*Estimate for materials and expenses for both SCS and agribusiness		

Evaluation: No-till farming tripled in two years since the marketing plan was implemented; crop residue use up 50 percent; being used in 75 percent of HEL plans; more than 1000 farmers participated in economic exchange program; alliance led to other cooperative projects; partners financed and distributed thousands of NRCS-developed information products.

PHASE 7– EVALUATE YOUR MARKETING EFFORT

After you have begun using your marketing plan to accomplish your goals, it's time to step back and evaluate to see what changes might be needed to make your marketing plan more successful.

QUESTIONS TO ASK

As with any new activity, you learn from experience. There are many questions you could ask to evaluate your effort. Here are a few:

- 1) Did you meet your action goals?
- 2) What worked well?
- 3) What didn't work?
- 4) What would you do differently next time?
- 5) What would you repeat?
- 6) Were your customers satisfied and their needs met effectively?

There is an evaluation section at the bottom of Worksheet 6 to record answers to your questions.

WHEN DO YOU CONDUCT EVALUATIONS?

There are two times when you should conduct an evaluation of your marketing effort. "During"—this allows for mid-course adjustments. "After"—this evaluation measures how well you achieved your goal after the marketing effort.

You might want to consider doing a "Before" evaluation to provide baseline or benchmark data before you implement your plan. You could also do an "Impact" evaluation. This evaluation measures long-term impact of marketing, and determines if the program's effects continue months or years after completion. This evaluation can be complex and should be conducted by a trained professional.

TASK

Review the case study examples for the evaluation part of Worksheet 6 on the previous page.

*"Even if you're on the right track,
you'll get run over if you just sit there."*

Mark Twain

APPENDIX A: MARKETING GUIDEBOOKS

Partnership Guide to Marketing

Provides detailed information about the marketing process, and explains why this process can be useful for promoting conservation services. This guide is useful for all phases discussed in the workbook.

Leadership Identification and Group Dynamics

Provides information about identifying and communicating with community leaders, and includes tips on holding more effective meetings. This guide is especially useful when applying Phases 1 and 2 of the marketing process as explained in this workbook.

Alliance/Partnership Building

Discusses methods for building effective alliances and partnerships to promote conservation goals. This guide is especially useful when applying Phase 2 of the marketing process as explained in this workbook.

Legislative Affairs

Provides an overview of how the legislative process works. This guide is especially useful when applying Phase 2 of the marketing process as explained in this workbook.

Conflict Management

Explains techniques for managing and resolving conflict situations. This guide is especially useful when applying Phases 2, 3 and 4 of the marketing process as explained in this workbook.

Information Gathering Techniques

Explains methods of collecting information from customers and other groups. This guide is especially useful when applying Phases 3 and 4 of the marketing process as explained in this workbook.

Reaching Out to Minority Groups

Covers various aspects of working with customers of different ethnic and racial background. This guide is especially useful when applying Phases 3 and 4 of the marketing process as explained in this workbook.

Guide to Direct Mail

Explains how to produce a direct mail campaign which reaches customers and gets responses. This guide is especially useful when applying Phase 4 of the marketing process as explained in this workbook.

Media Relations

Provides instructions for utilizing the media to promote conservation programs. This guide is especially useful when applying Phases 4, 6 and 7 of the workbook.

How to Obtain These Materials

Request these guidebooks from the NACD Service Center, P.O. Box 855, League City, Texas 77574. The phone number is 1-800-825-5547.

**APPENDIX B:
BLANK WORKSHEETS**

WORKSHEET 1

CRITICAL ISSUES

1. Select the most critical ongoing or emerging conservation issues in your community that you want to address.

Issue:

We need to:

Issue:

We need to:

Issue:

We need to:

Issue:

We need to:

2. Check your highest priority issue, or combine related issues into a single issue, for which you will develop a marketing plan.

WORKSHEET 2

FORM AN ALLIANCE/IDENTIFY YOUR ROLE

1. For the issue you circled in Worksheet 1, list other groups in your community who are also addressing this issue. What can this group provide? How will this group benefit from cooperating with us?

Group

What they can provide

How alliance benefits them

2. For the issue you selected, complete the following phrases in as many ways as you can think.

a. We're the people who ...

b. No one, but no one, can _____ as well as we do.

c. We want to be seen as ...

3. Now go back and circle the phrases that most strongly convey who you are and what unique role you want to play

4. Based on the circled phrases in #2 above, and applying the four criteria for good role statements (short and to the point, use everyday language, convey character, and use action verbs), write your role statement here:

5. Test this with alliance members. Revise statement if necessary. This statement will change over time as you learn more about your alliance, customers or as the issue changes.

WORKSHEET 3

CATEGORIES OF CUSTOMERS

1. Make a complete list of your customers for the issue you have selected.

Who

What we want them to do

Benefit to them

WORKSHEET 4A

IDENTIFY CUSTOMER NEEDS

1. For your critical issue, use information gathering techniques to answer the following questions for each customer group identified in Worksheet 2. Complete this worksheet for *each* customer group.

What does your customer need to deal with this issue?

What services do you offer to help customers deal with this issue?

Why are customers not using the service as much as you like? What can you do to make this service more convenient and accessible to meet customer needs?

What services need to be developed to meet customer needs?

Where do customers get information about this issue and the service you or your partners provide?

What characteristics of customers (age, income, education, etc.) will affect how you provide services regarding this issue?

2. How will you get information about customer needs? Check all that apply.

- Existing information that you already have
- Existing information that your partners already have
- Printed information from previous studies, newspaper articles, etc.
- Gather information yourself with your partners through methods checked on Table 4
- Hire a consultant or use a volunteer who is a professional

WORKSHEET 4B

IDENTIFY ALLIANCE MEMBER NEEDS

For each customer group, visit with alliance members to get their perspective of customer needs and how they are dealing with them. Also visit with any potentially new alliance member/customers suggested in Worksheet 4A.

Customer:

Alliance Member(s):

How do we share this customer?

What does this alliance member(s) tell you the customer needs to deal with this issue?

What service(s) does this alliance member(s) offer to help your customers deal with this issue?

For this issue, how can we work together to meet customer needs and achieve this alliance member(s) goals?

WORKSHEET 5

ACTION GOALS

1. Customer:
2. Based on the information you've gathered from customers and alliance members, what broad strategy will you use to address this critical issue?
3. Considering outside factors that may work for or against you, what is the best possible goal you can achieve in addressing this issue?

Goal:

By When:

Goal:

By When:

Goal:

By When:

WORKSHEET 6

DEVELOP THE MARKETING PLAN

Critical Issue:

Customer:

Customer Needs:

Identify Partners and Alliance Members:

Broad strategy you will use to meet customer needs:

Action Goal(s):

Activity

Who

Cost

Start

End

Evaluation:

SEVEN PHASES OF MARKETING

PHASE 1

Identify Critical Issues

PHASE 2

Develop Alliances and Determine Your Role

PHASE 3

Define Customers

PHASE 4

Identify Customer Needs

PHASE 5

Set a Strategy and Action Goals

PHASE 6

Develop and Activate the Marketing Plan

PHASE 7

Evaluate Your Marketing Effort