



Basics of Marketing Discovery and Assessment

When an organization is faced with a new communications opportunity or a challenge/problem, the discovery and assessment process to find the proper solution is basically the same for small to large for-profit businesses, nonprofits, educational institutions and almost any organization. No matter what the communications problem is, it often comes down to reviewing basic questions when developing a solution, and many companies don't even ask them.

1. Discovery and Assessment

- a. What are we trying to do?
 - i. Inform and build awareness?
 - ii. Launch something new – a product, service, campaign, position or policy?
 - iii. Influence a recommendation or decision?
 - iv. Correct or positively impact a problem?
- b. Audience – Even though we assume we know our audience, we should review our basic assumptions about them.
 - i. Is the opportunity or challenge internal, external or both.
 - ii. Who is/are the audience/s we are trying to reach or impact?
 - iii. Are we considering that we may have multiple audiences and the messaging and outcomes for each may be different?
 - iv. Have we identified and analyzed the audience/s properly?
 1. Who are they?
 - a. External – customers, clients, general public?
 - b. Partners, alliances, funders or sponsors?
 - c. Internal, e.g., employees, board, members, vendors?
 - d. Media?
 2. Gender?
 3. Age?
 4. Education level?
 5. Work and other interests?
 6. Group or political alignment or pressures?
 7. What do they care about that will impact them receiving our message?
 8. What biases or prejudices to they have that will impact receiving our message?
 9. Where and how do they get their information and how do they filter it?
 10. Psychographic and other considerations?
- c. What response do we expect or need?
- d. How does this particular opportunity or challenge align with our organizational vision, mission, goals, strategies, brand and image?

2. Based on the above assessment, have we considered all the forces and options to impact success?

- a. What resources do we have?
 - i. Internal – staff, design and printing, distribution channels such as web or blogs, budget?

- ii. Partners – who and what can they provide in the way of support, influence, distribution channels, etc.?
 - iii. Board recommendations – contacts and influence for in-kind contributions and other support?
 - iv. External – network of approved talent and vendors?
 - b. Timely nature of opportunity/challenge and timeline?
 - c. Are there multiple audiences and messages that must be dealt with simultaneously?
 - d. Are there competing organizational challenges for time, resources, priorities and outcomes?
 - e. How does this tie into other organization communications strategies and messaging?
 - f. Who needs to be engaged in the process, solution and approval?
 - g. What are the best channels and vehicles to use?
 - h. How will you measure success and have you built the success criteria into the process?
2. The above discovery and assessment criteria can, and should, be used on all communications opportunities and challenges, for example:
- a. Opportunities include
 - i. New product or campaign launch
 - ii. Event promotion and marketing
 - iii. Image and awareness marketing
 - iv. Public relations
 - v. Community relations and public affairs
 - vi. Direct marketing
 - vii. Advertising
 - viii. Social media
 - ix. Website and eCommunications
 - x. Communications to staff, board, partners and funders
 - b. Types of challenges include
 - i. Brand and image alignment
 - ii. Communications alignment with organizational goals
 - iii. Culture change
 - iv. Change management
 - v. Downsizing and reorganization
 - vi. Crisis communications

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