



**CharityWise.**  
BY FRESH EGG

# How to create a digital marketing strategy

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David Somerville - September 2024

# About David Somerville

David Somerville is a digital marketing consultant, having nearly 30 years' worth of marketing experience, which means he was involved in using the Internet before Google was launched.

For the past 12 years he has worked for a digital agency and has supported numerous charities and non-profits with their strategic challenges and created digital strategies for the likes of the RSPCA, NHS Charities Together and Christians Against Poverty.

David has delivered numerous training sessions, as well as run workshops and presented at events, including the CharityComms Digital Conference. He's also written for the likes of Econsultancy and Smart Insights. He's also a CharityComms mentor. David has recently set-out as an independent marketing consultant, using his experience to help several different businesses achieve their goals.

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# Today we'll talk about the following topics

- Setting the scene
- Strategy fundamentals
- How to create a digital marketing strategy
- A simple digital marketing framework
- What comes next?
- Summary

# Setting the scene

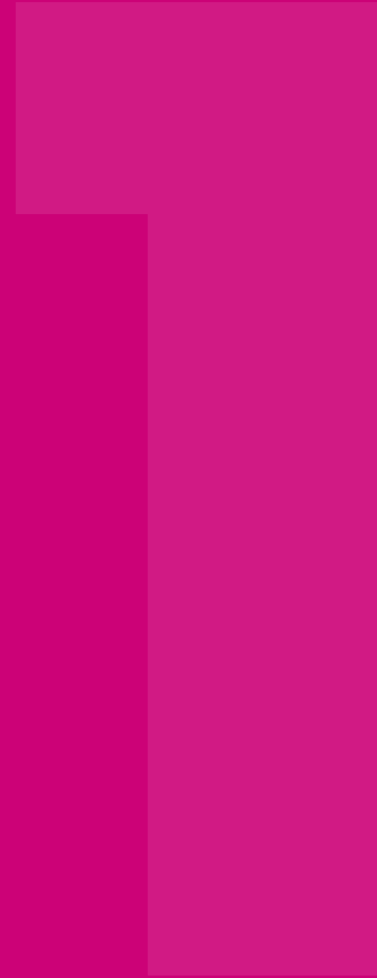
According to the Charity Digital Skills Report (2024), 54% of charities see building online presence and social media as vital.

And 76% feel they have made digital progress in the past year.

However, only 50% of charities were found to have a digital strategy in place.

Today we'll be looking at the fundamentals of strategy, look at a framework for a digital marketing strategy and understand how you can best approach creating one.

# **Strategy fundamentals**



# What is a strategy?

## A definition:

“A careful plan or method for achieving a particular goal (or goals), usually over a long period of time.”

# Strategy vs Tactics

## Strategy

This is the big picture, high-level view.

A strategic plan tells you where you are, what you want to achieve, how will you do this and how you will know what has been achieved.

# Strategy vs Tactics

## Strategy

This is the big picture, high-level view.

A strategic plan tells you where you are, what you want to achieve, how will you do this and how you will know what has been achieved.

## Tactics

These are the things that you will implement specifically as part of the strategy.

This is the 'doing' part.

Tactics should be prioritised and measurable.



# Digital marketing strategy or digital strategy?

## Digital Marketing Strategy

The use of digital channels to reach and engage your target audiences.

or

## Digital Strategy

An even wider piece that also considers the technological architecture (IT, software etc) that is required to fulfil your charity objectives.

Both can be used interchangeably too!

We will focus on a '**Digital Marketing Strategy**' today...

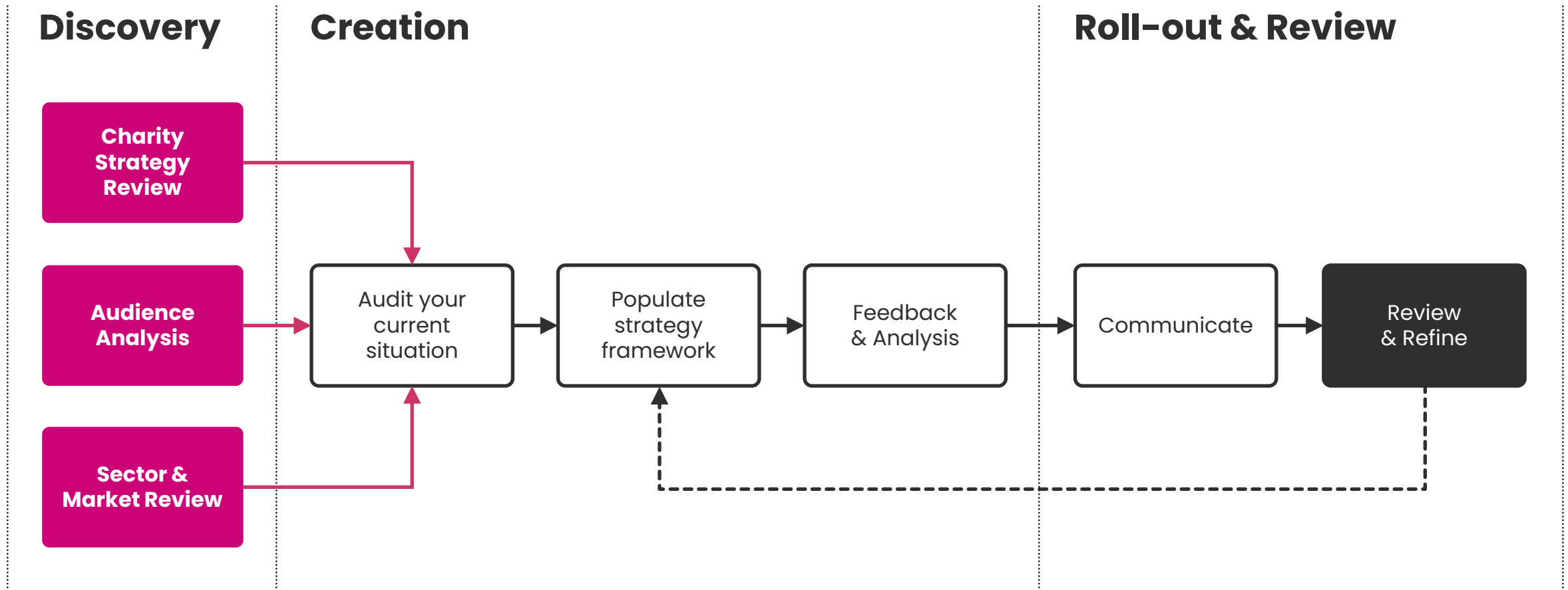
# 6 benefits of having a digital marketing strategy

- 1** It gives you a clear and documented plan – what needs to be achieved, how you will do that and how will you measure that.
- 2** It helps you to understand your audiences more.
- 3** It will help give confidence and buy-in for digital activity with internal people, including trustees.
- 4** Avoids time-wasting and duplication.
- 5** It can help to justify time, resources and budgets.
- 6** It helps you track the impact of your efforts.

# How to create a digital marketing strategy



# A typical process



# Discovery

1. Review your charity strategy
2. Map out your audience insights – do more research if required
3. Look at the space you operate in, plus the wider sector
4. Assess your current digital marketing activity

## **Outputs:**

- Produce a SWOT – listing your Strengths, Weaknesses, Opportunities and Threats
- Audits of your channels
- Audience empathy maps, journey maps and insights

# Creation

- Use your Discovery learnings and other knowledge to populate the strategy framework
- Get feedback from relevant people, then make any amends

# Roll-out and review

- When it's ready, communicate it out to anyone who needs to be made aware within the charity
- If you work with third parties (freelancers, agencies) then share with them too
- Set in place points to measure your activity and decide on what reporting you will do and when
- If you feel that things need to change after a period of time (i.e. after year 1), then refine and update the strategy

# **A simple digital marketing strategy framework**

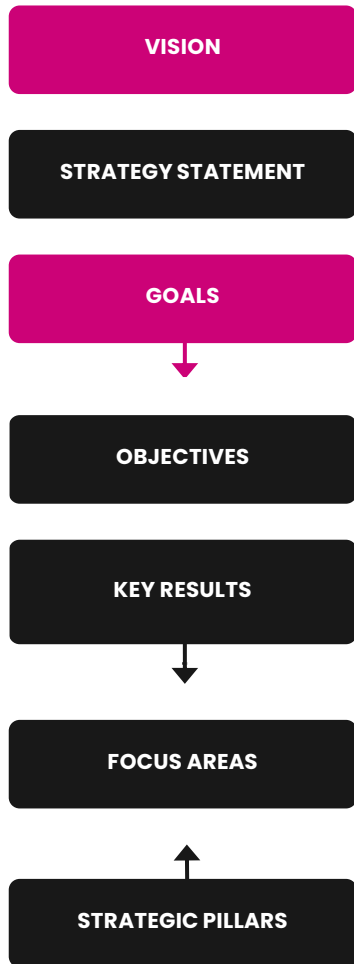




# Key components

- Vision
- Strategy statement
- Goals
- Objectives
- Key Results
- Focus areas
- Strategic pillars

# Strategy on a page



# Vision

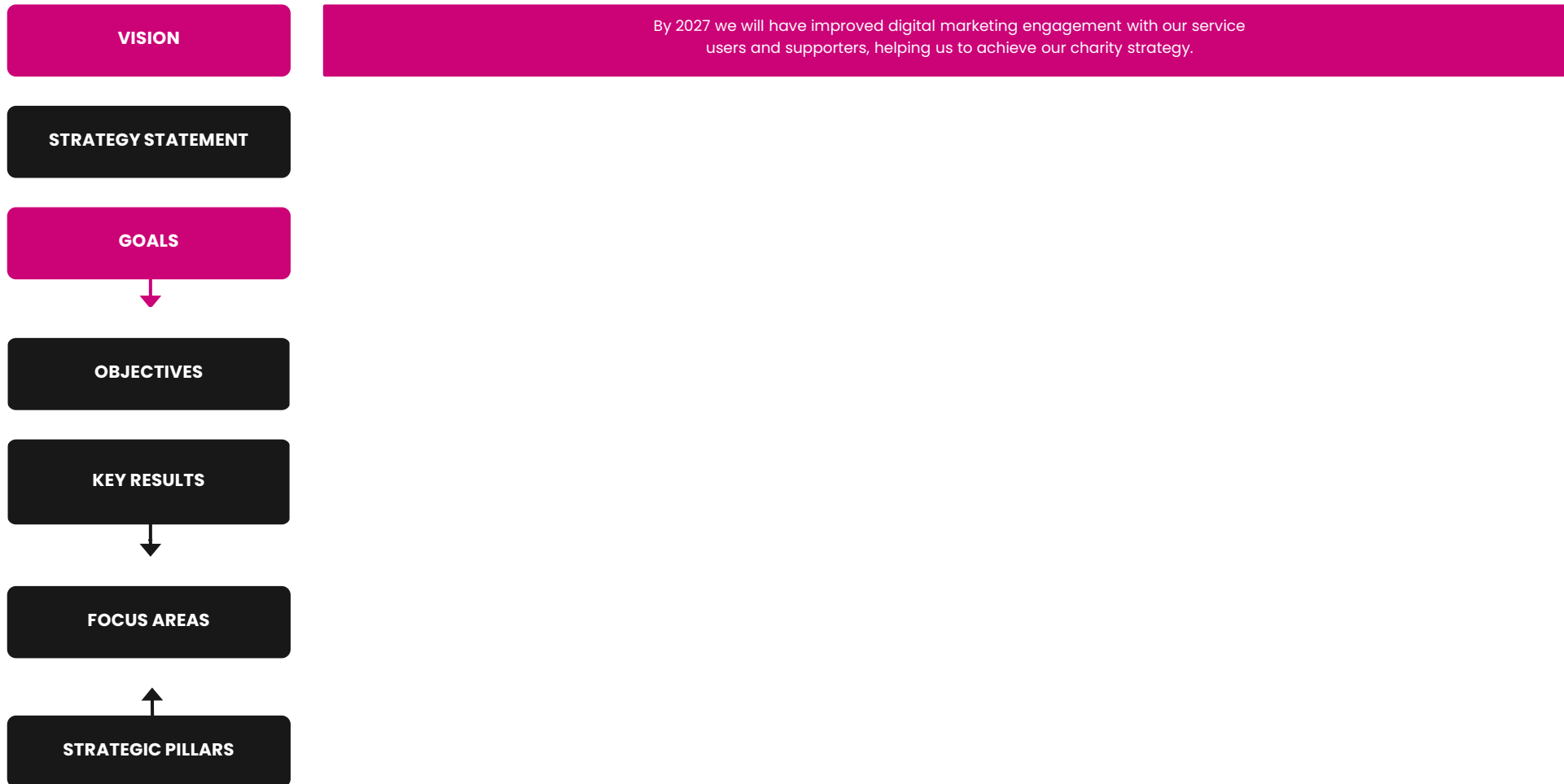
## **Where will you digital marketing be in X years?**

This should be a forward-thinking statement about where you are aiming to get to in your future...it's your North Star.

Describes where you see digital marketing for your charity being in the future.

Good for everyone to see what you are looking to achieve in the long-term.

# Strategy on a page – Vision



# Strategy statement

## **What is your strategy looking to do and how?**

Describes what the digital marketing aims to do on a day-to-day basis.

Good for people to see what this means right now.

Helpful for those implementing it, to keep them on the right course.

# Strategy on a page – Strategy statement

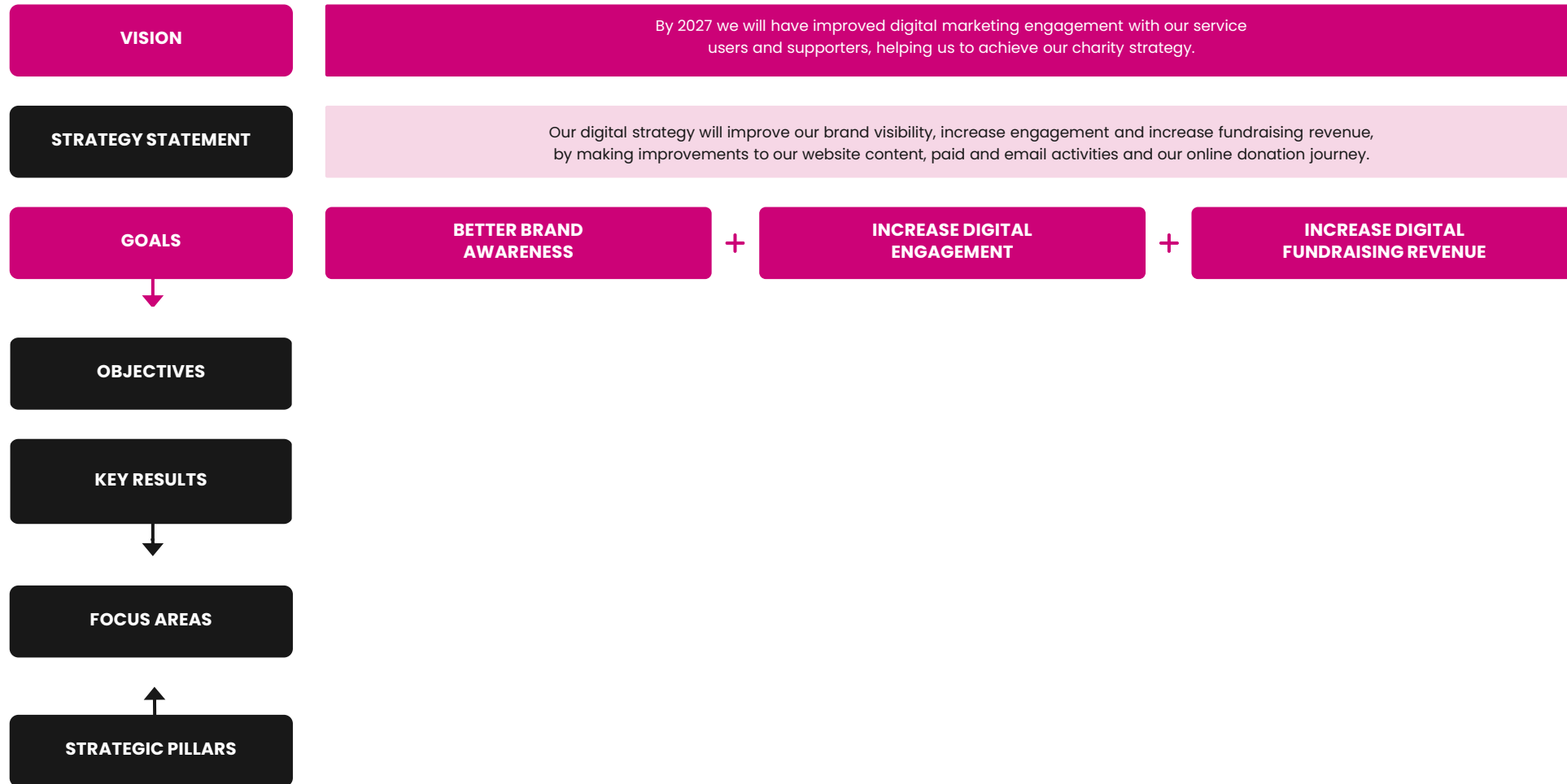


# Goals

**What are the broad things you want the strategy to achieve?**

These should be quite top-level and feel 'big'.

# Strategy on a page – Goals





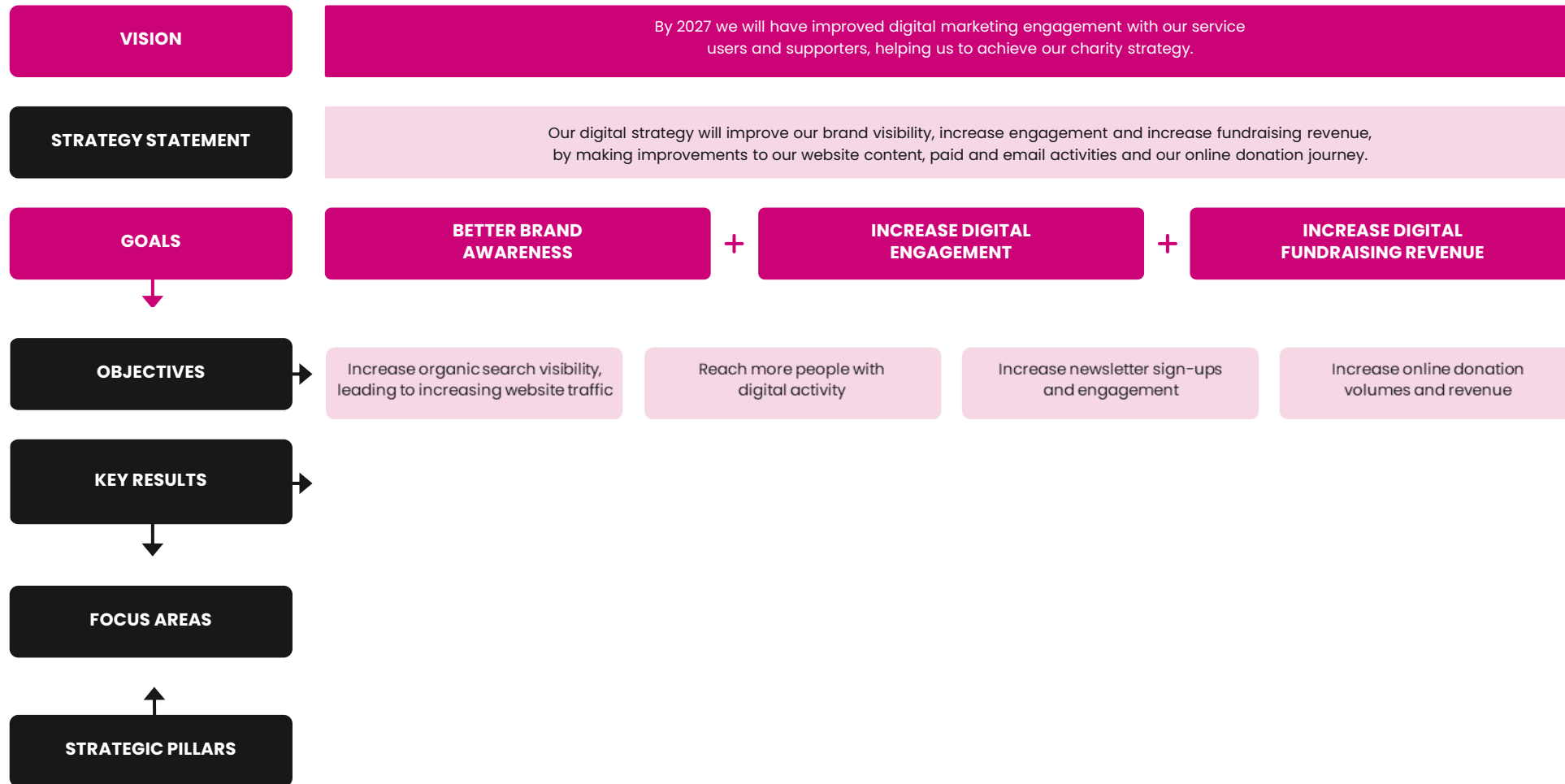
# Objectives

## **What are the specific things the strategy will achieve?**

Against each goal you then set one or more objectives.

These are more detailed and can often contain specific numbers or targets, e.g. “Increase website traffic by 100% in the next 12 months”.

# Strategy on a page – Objectives



# Key results

## How will you measure progress and achievement?

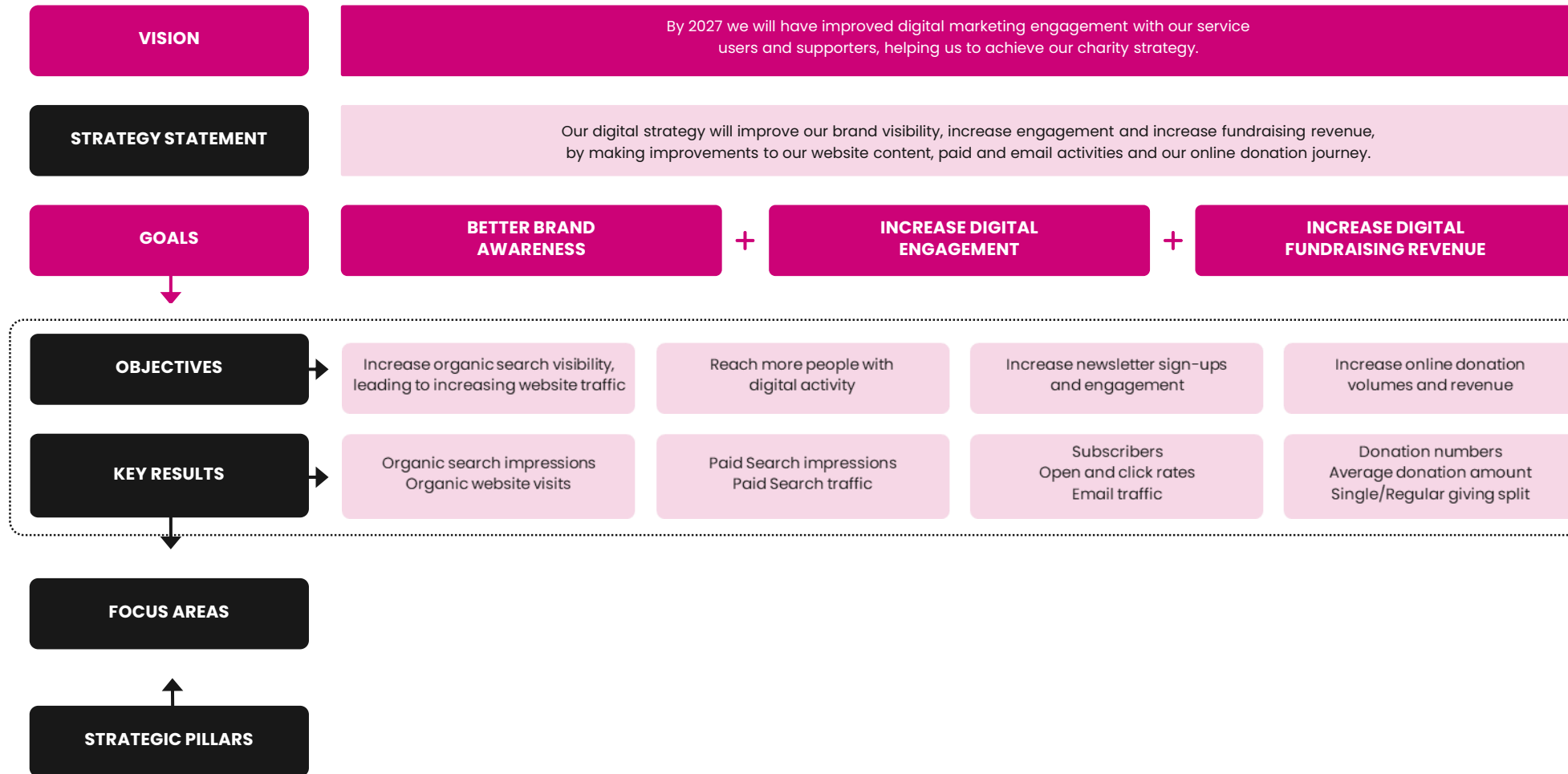
Each objective then needs at least one measure against it – these are typically Key Performance Indicators (KPIs) and help you to track your performance.

The measures would usually be numerical, however you could use ‘soft metrics’ (e.g. *‘better brand reputation’*).

Now you have created a set of ‘Objectives and Key Result’ (OKRs).

OKRs are a recognised strategy model.

# Strategy on a page – Key results



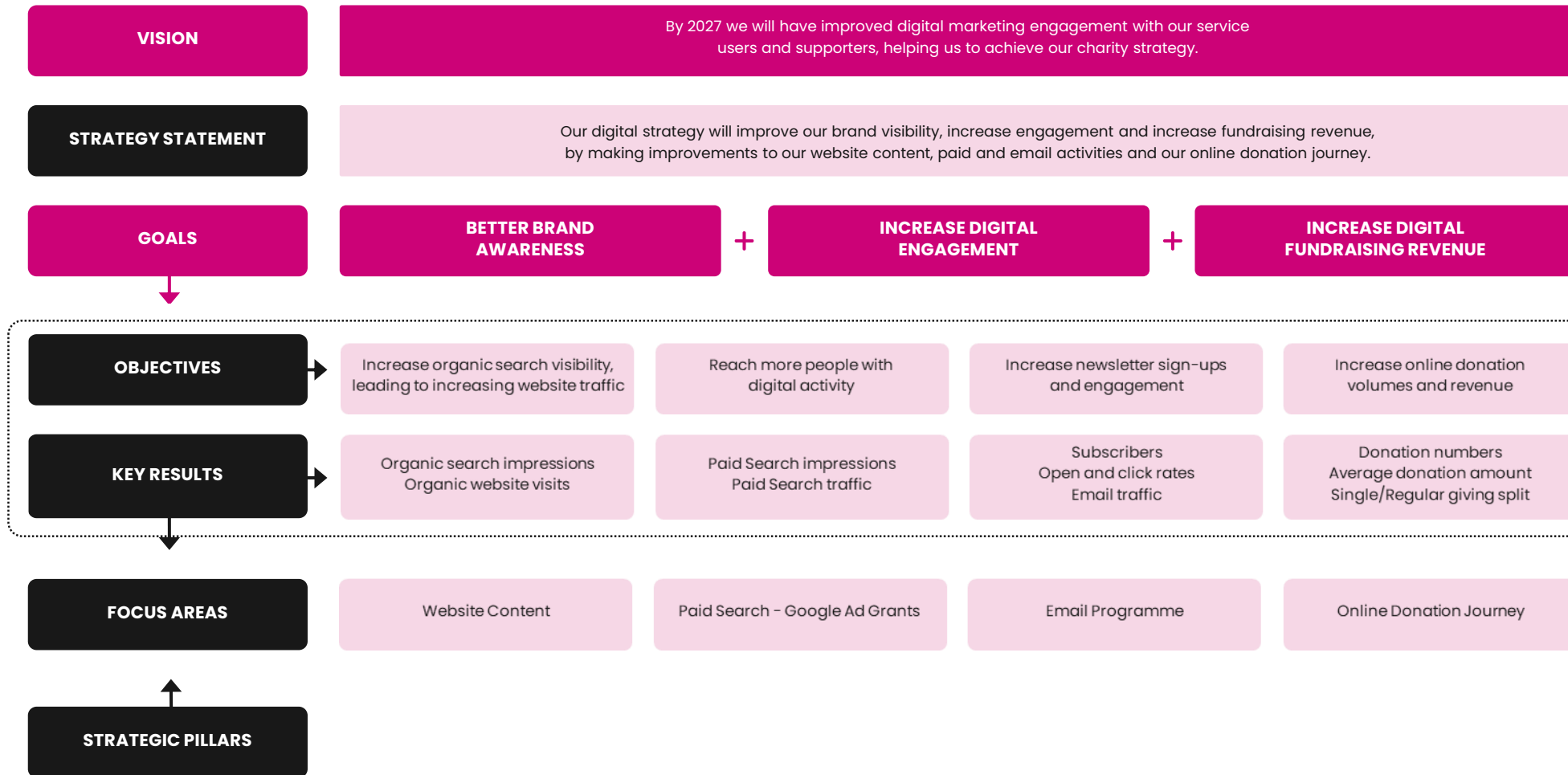
# Focus areas

## What will the strategy and tactics be focusing on?

These help to show at a top-level where you should be focusing most of your efforts (time/budgets) against.

You may also be needing to do 'business as usual' activity on a day-to-day basis.

# Strategy on a page – Focus areas



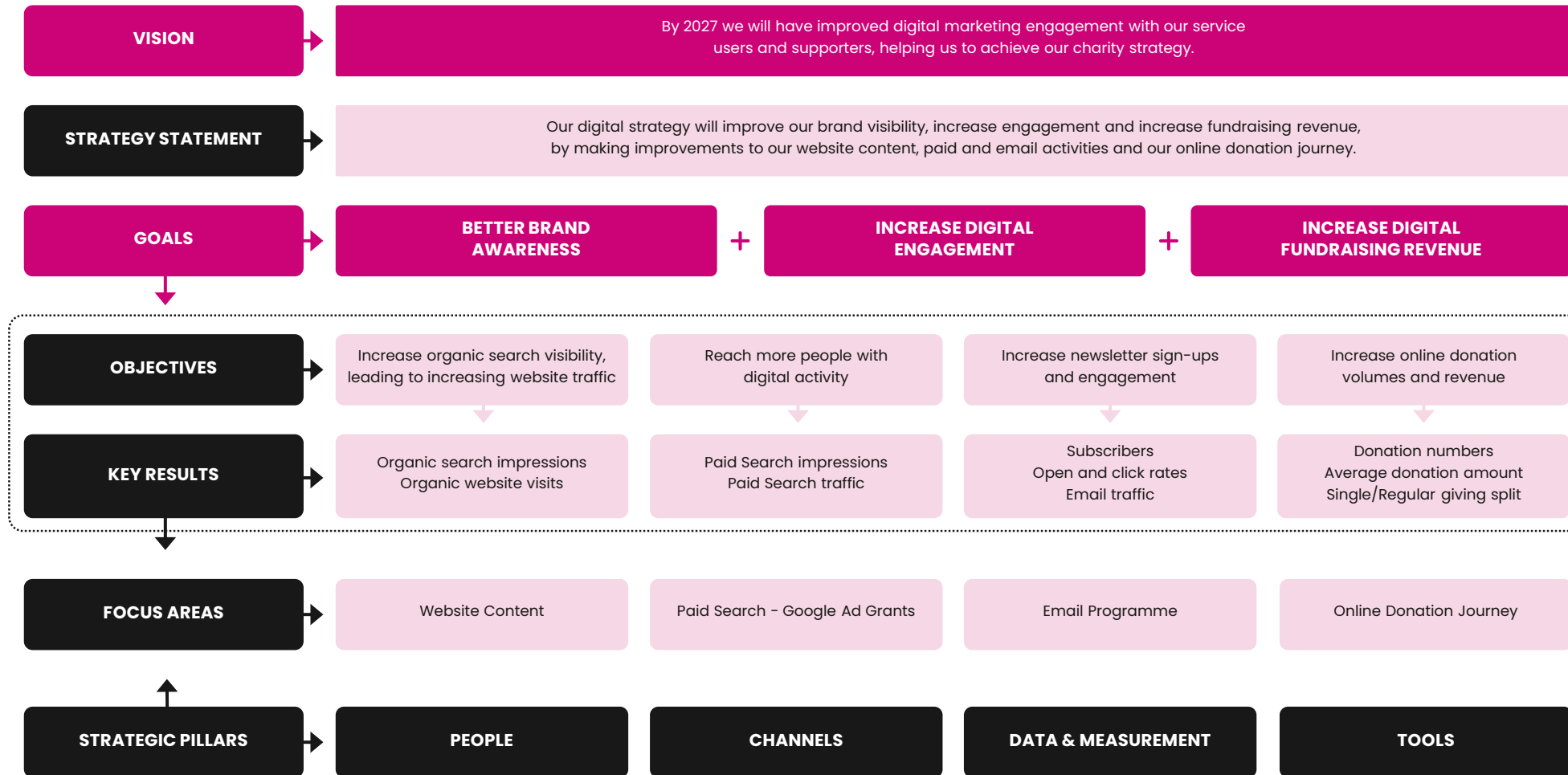
# Strategic pillars

**What things are needed to support the strategy and give it the best chance of being successful?**

These 'enablers' are the internal things you need to be ensuring are in place or improving, in order to help the strategy.

You may need to create a plan on how to improve these as well.

# Strategy on a page – Strategic pillars





**What comes  
next?**



# Tactical plan

This is a plan of all of the tactics that you need to employ in order to achieve your strategy.

You may have a long list of tactics, so prioritise these to work on the ones that are most important first.

One way to do this is scoring their 'impact' versus their 'effort'.

# Roadmap

This is a visual and top-level 'timeline' to help show people what the key things are from the strategy you will be working on and when.

This can use your focus areas and then plot these out in workstreams against the months/quarters/years of your strategy.

# Reporting

A critical part of the strategy is measurement. You need to be seeing what is working (or not).

Specify what reporting you need to do and when, e.g. for Trustees meetings.

Decide on the format for this – written report, visual dashboard etc

Use your Goals and OKRs to help frame the reporting and show what progress has been made.

# Summary



# Key takeaways

**1**

Carry out **discovery** of your current situation, your audiences and your sector/market.

**2**

**Create** the strategy - use the framework and build it out. Gain feedback.

**3**

**Roll-out** across the charity and **review**, so you can report on its impact and refine if needed.

# Tips for a successful strategy



**Start simple**

**Be ambitious  
but realistic**

**Right people,  
right time**

# Tips for a successful strategy



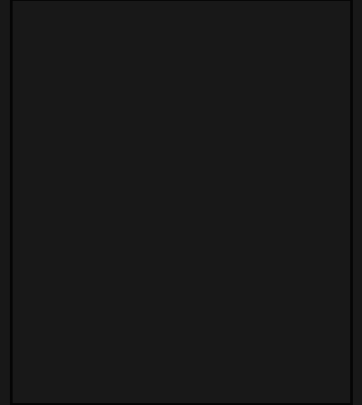
**Set a  
timeframe**

**Agree review  
points**

**Make sure  
You use it!**



**CharityWise.**



**If you have any questions, then please speak to Fran Hall**

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