

How to create a simple digital marketing strategy

January 2025



Setting the scene

According to the Charity Digital Skills Report (2024):

54% of charities see building online presence and social media as vital.

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

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

Introduction

Creating a strategy might seem overwhelming, especially for smaller charities, but having one is essential—regardless of size.

This training session will simplify this process to help you develop a straightforward **'strategy on a page'**.

Today we'll cover:

- The fundamentals of strategy
- Creating your digital marketing strategy in three stages
- A framework for building your 'one page' digital marketing strategy

Strategy fundamentals

- What is a strategy
- Strategy vs tactics
- Digital marketing strategy or digital strategy
- The six benefits of having a digital marketing strategy



What is a strategy?

A strategy is a simple plan that helps you decide what you want to achieve and how you will get there. It's like a roadmap—it shows you the best path to follow and keeps you focused on your goals.

Definition:

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

Here's an example:

If your goal is to bake a cake, your strategy would include choosing a recipe, gathering ingredients, and following the steps to bake it.

Strategy vs Tactics

What is a strategy?

This is the “why” and “what” of your plan.

A strategy is your big-picture plan. It sets the direction and defines your goals, helping you focus on what you’re trying to achieve and why it matters. It provides the foundation for all your decisions.

Example:

Your strategy might be to raise awareness about your charity’s work and increase donations by reaching more people online.

What are tactics?

This is the “how” and “when.”

Tactics are the specific actions or tools you use to execute your strategy. They’re the practical steps you take to bring your plan to life.

Example:

If your strategy is to raise awareness and donations online, your tactics might include:

- Targeted social media ads
- Sending out a monthly email newsletter
- Hosting a live fundraising event on Instagram

Digital marketing strategy or digital strategy?

You might hear the terms **digital marketing strategy** and **digital strategy** used interchangeably, but they have distinct meanings.

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.

How they work together

A digital strategy provides the overall direction for how your organisation uses digital tools across all areas, while a digital marketing strategy zooms in on how to communicate and connect with your audience effectively.

Do I need both?

Without a digital strategy, you might focus too narrowly on marketing without considering how other areas of your organisation can benefit from digital tools.

Conversely, without a digital marketing strategy, you risk missing out on opportunities to promote your cause and engage your audience effectively.



Key takeaway

Your digital strategy is the big picture; your digital marketing strategy is one essential piece of that puzzle.

Both are crucial for a well-rounded approach to achieving your goals.

This session focuses on a '**Digital marketing strategy**'.

6 benefits of having a digital marketing strategy

1

Clear goals and direction: It helps you define your objectives and gives your team a clear sense of purpose. Whether it's increasing donations, growing awareness, or engaging new supporters, your strategy keeps everyone aligned and focused.

2

Increased audience engagement: It helps you to identify your target audience and understand how to reach them using the right channels and messages. This leads to stronger connections and greater trust in your organisation.

3

Better resource allocation: You can prioritise efforts and allocate budgets, time, and people effectively. This ensures you get the most value from your limited resources, which is especially important for smaller charities.

4

Improved measurement and adaptation: By tracking your performance against your strategy, you can measure what works and what doesn't. This allows you to adjust your approach and improve results over time.

5

Stronger online presence: A strategic approach ensures consistency in your online messaging and branding, making your charity more recognisable and credible across all digital platforms.

6

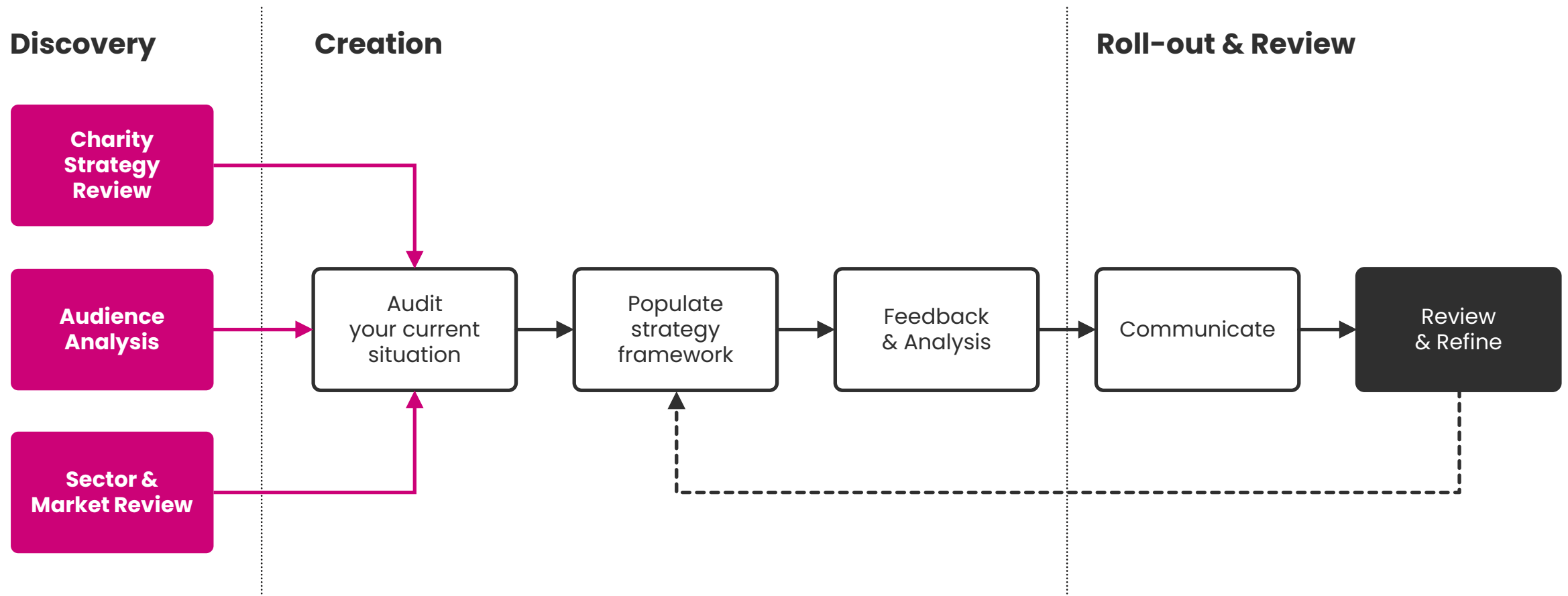
Consistency across channels: It ensures your messaging is consistent across social media, email campaigns, your website, and other platforms.

How to create a digital marketing strategy

- The three stages
- Discovery
- Creation
- Roll out and review



Creating your digital marketing strategy in three stages



**Discovery
stage**

2.1

Discovery stage: Building the foundations for your strategy

What to consider during discovery

- **What's most important to your charity:** What is your charity's mission, and how might digital marketing help support it?
- **Your current efforts:** Even without a strategy, what has or hasn't worked in the past? What feedback or outcomes have you seen?
- **What could you change:** What would make the biggest difference to your charity?
- **Pain points:** Are there specific challenges you face that digital marketing could help solve?
- **Possible improvements:** Could improving your online presence help you connect with more donors, volunteers, or beneficiaries?

Why is this step important

- **Provides clarity:** Helps you figure out where your charity should focus its digital marketing efforts
- **Aligns with your mission:** Ensures your strategy ties back to your charity's overarching purpose and values
- **Identifies opportunities:** Reveals potential areas for growth or improvement, even if you haven't been actively looking for them
- **Lays the foundation:** Creates a starting point for more structured planning and goal-setting later in the process

Discovery in detail

Defining this stage

Charity Strategy Review



Review your charity's strategy: (if you have one), goals and objectives. Be clear on these. What do you want to achieve?

Audience Analysis



Look at your audiences: Who are your donors, volunteers, sponsors and beneficiaries? If you have knowledge gaps, do some research.

Sector & Market Review



Consider what's happening in the sector: What's ahead that might need to be taken into account (e.g. further financial uncertainty); what new technology could be utilised (AI).

Discovery in detail

Possible next steps to consider:

- **Produce a SWOT analysis:** Assess your current situation. List your Strengths, Weaknesses, Opportunities and Threats
- **Audit your marketing channels:** Review your channel performance – Look at social media, email and other channels you may be using
- **Understanding your audience:** You may want to carry out a simple survey to ask donors, volunteers, and beneficiaries why they engage with your charity to gain a deeper understanding of who they are



Remember

Your digital marketing strategy doesn't have to be perfect from the outset; it will evolve as you gain insights and refine your approach.

The key is to start somewhere, and the discovery phase provides the perfect opportunity to explore and clarify your charity's direction.

**Creation
stage**

2.2

Creation stage Turning insights into action

The creation stage is where all the hard work from the discovery phase starts to take shape. Using the insights you've gathered; you'll begin building your digital marketing strategy.

This step is about making everything clear and actionable, so your charity has a solid roadmap to follow.



A simple 'one-page' digital marketing strategy framework

The strategy framework i'll introduce will help you structure your ideas into a simple, one-page plan.

Key components

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



Digital Marketing Strategy

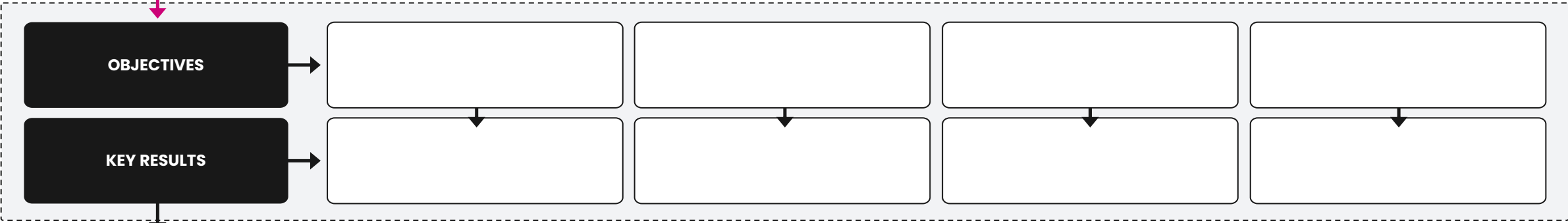
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Strategy on a page: **Vision**

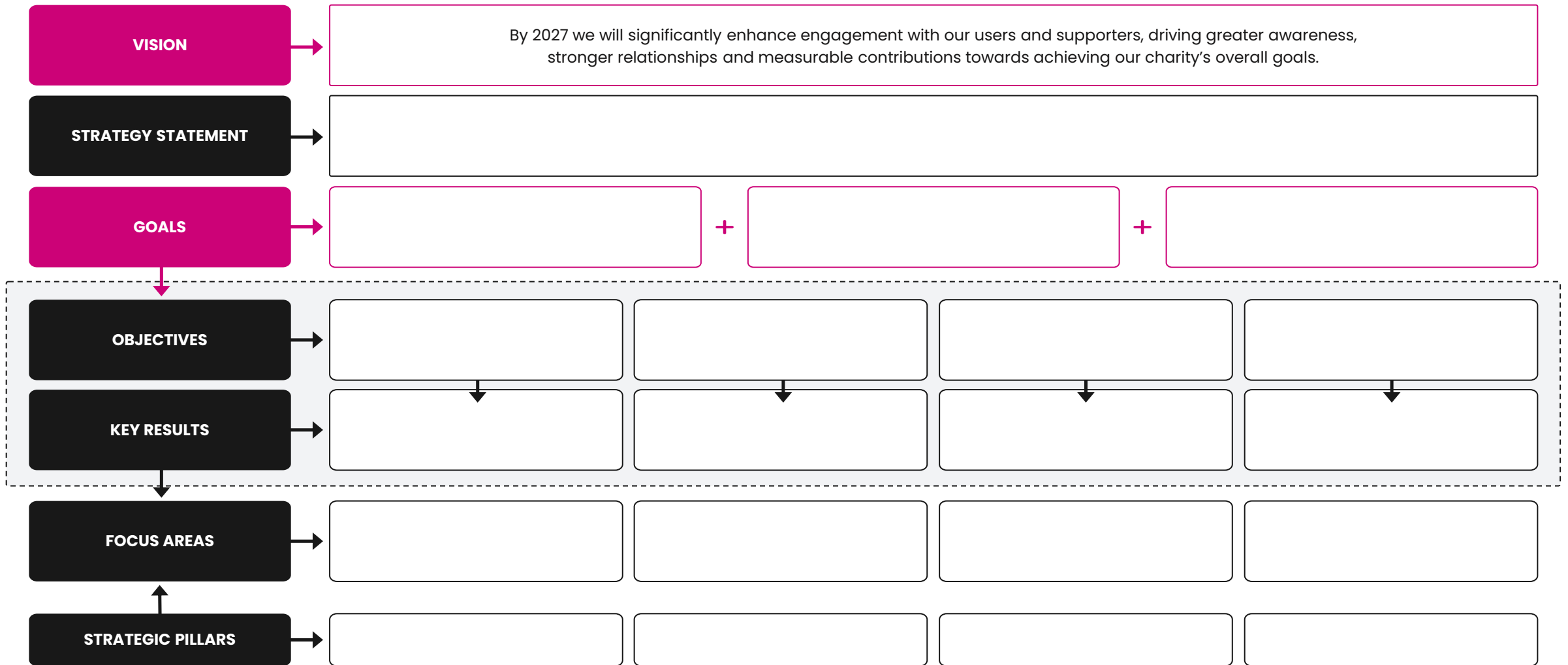
At the very start of your strategy is your Vision—a forward-thinking statement that defines where you want your charity to be in the future. This is your North Star, providing direction and inspiring everyone involved.

Defining your digital marketing strategy vision:

- **Think long-term:** Imagine where you want your charity's digital presence to be in 3-5 years. What impact do you want to create online?
- **Focus on outcomes:** Aim for a vision that emphasises the impact, like building an engaged online community, rather than just specific tactics
- **Keep it inspiring:** Make your vision motivational and exciting, so it resonates with your team and supporters
- **Align with your mission:** Ensure your digital marketing vision reflects your charity's core mission and values
- **Be clear and concise:** Use simple, straightforward language so everyone can easily understand and support your vision

These tips will help you define a clear, impactful digital marketing vision that aligns with your charity's goals.

Strategy on a page – Vision



Strategy on a page: **Strategy statement**

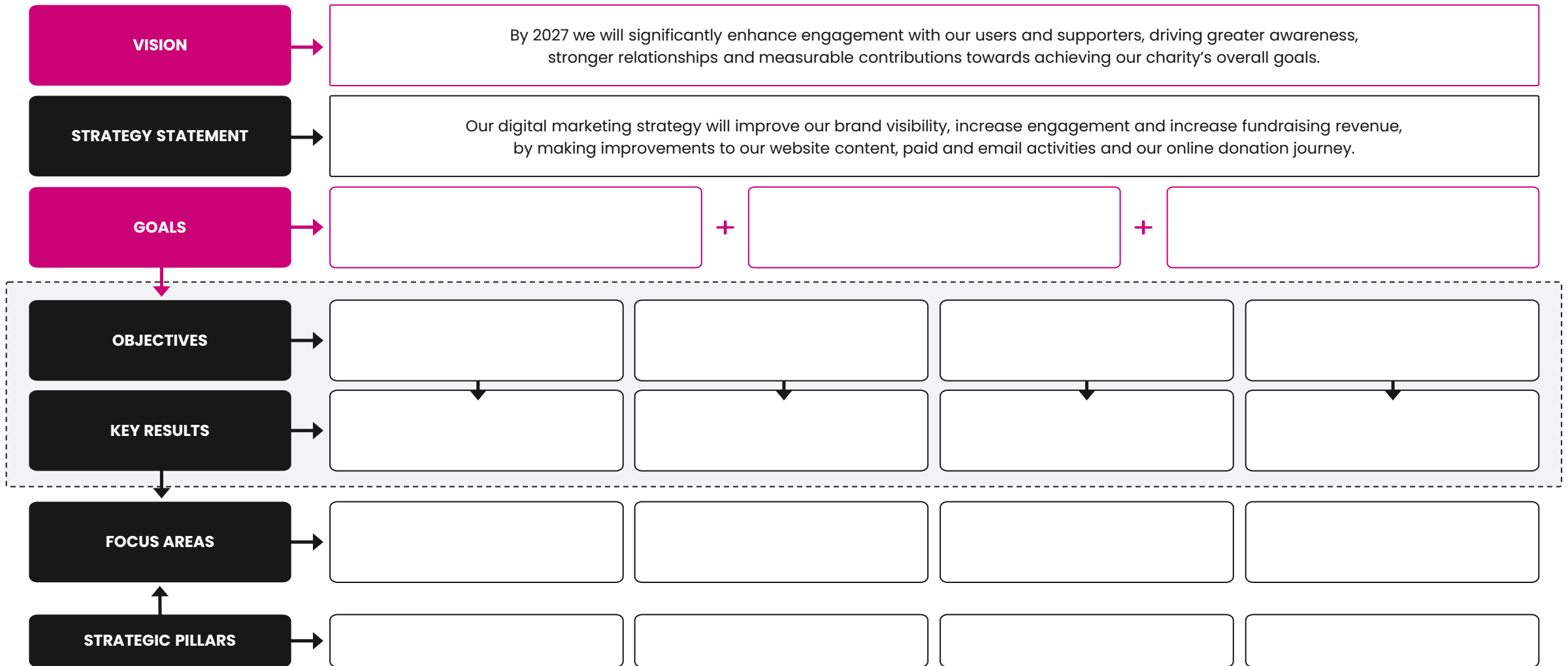
The strategy statement outlines what your digital marketing efforts aim to achieve daily. It provides clarity on the immediate goals and actions needed to move towards your vision.

Crafting your strategy statement:

- **Align with the vision:** Ensure your strategy statement ties directly to your broader vision and goals, providing clear guidance on how to get there
- **Keep it practical and actionable:** Focus on realistic and specific actions that can be consistently executed to move the digital marketing forward

These tips will help you create a strategy statement that guides your team's daily actions and keeps everyone aligned with your charity's digital marketing goals.

Strategy on a page – Strategy statement



Strategy on a page: **Goals**

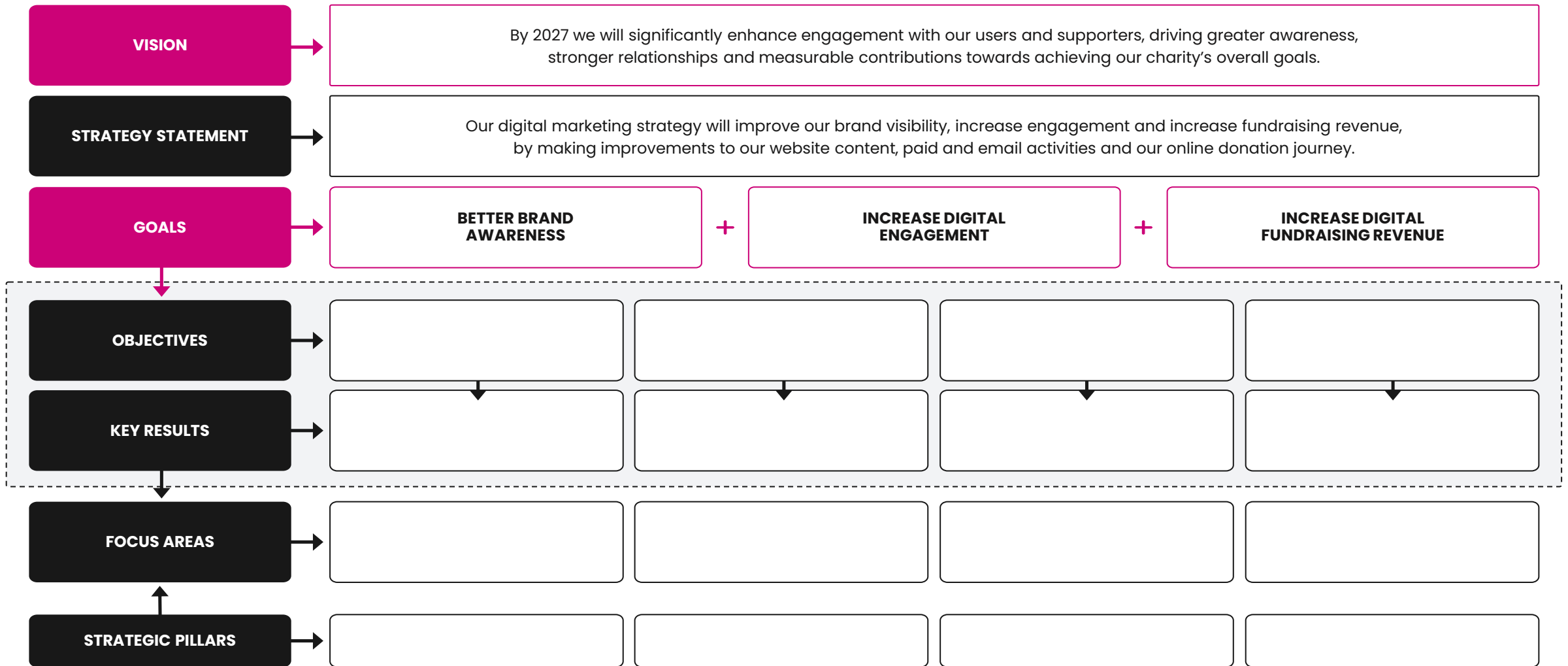
Goals are the big, overarching outcomes you want to achieve with your digital marketing efforts.

Setting digital marketing goals:

- **Think big and bold:** Set goals that are ambitious and drive long-term growth, like increasing awareness or building a strong online community
- **Focus on key outcomes:** These goals should focus on what you want to achieve at a high level, such as expanding your reach, engaging your audience, or increasing donations
- **Keep them broad but clear:** Goals should be broad enough to give direction but specific enough to guide your actions, such as *“grow online presence”* or *“drive more traffic to our website”*
- **Align with your vision:** Ensure these goals directly support your vision and contribute to the charity’s overall direction

These big-picture goals will serve as the foundation for your digital marketing strategy, helping guide all efforts toward achieving your charity’s vision.

Strategy on a page: **Goals**



Strategy on a page: Objectives

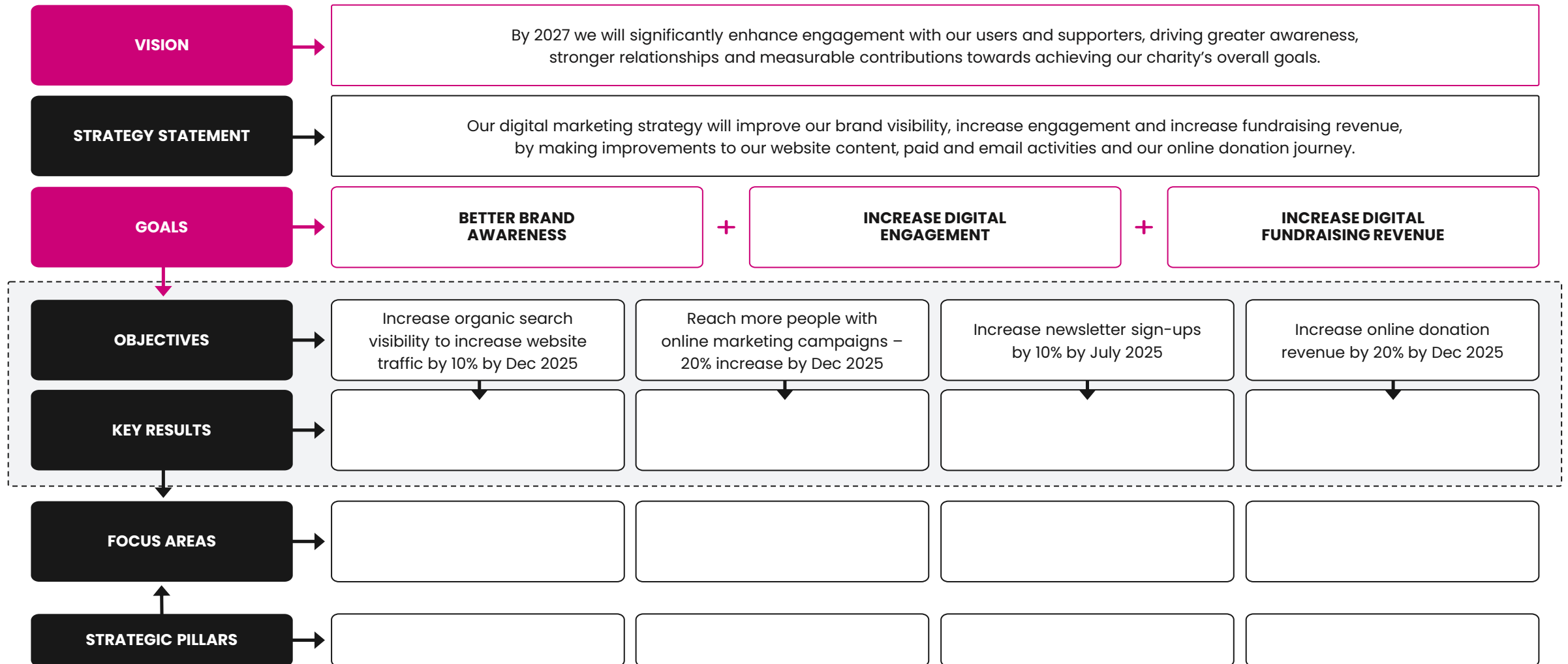
Objectives are the more specific, measurable targets you set to achieve your larger goals.

Setting digital marketing objectives:

- **Include numbers and timelines:** Make your objectives clear and focused. They should include quantifiable targets (e.g., "*Increase email open rates by 15% in 3 months*") and a timeline for achieving them
- **Make them achievable:** Set objectives that are challenging yet realistic based on your current resources and capabilities
- **Ensure they align with goals:** Every objective should directly support the broader goal it's tied to, ensuring you stay on track
- **Monitor and adjust:** Regularly track your progress toward objectives and adjust if necessary to stay aligned with the bigger picture

These objectives will give you clear milestones to work toward and ensure you're making measurable progress in your digital marketing strategy.

Strategy on a page: Objectives



Strategy on a page: **Key results**

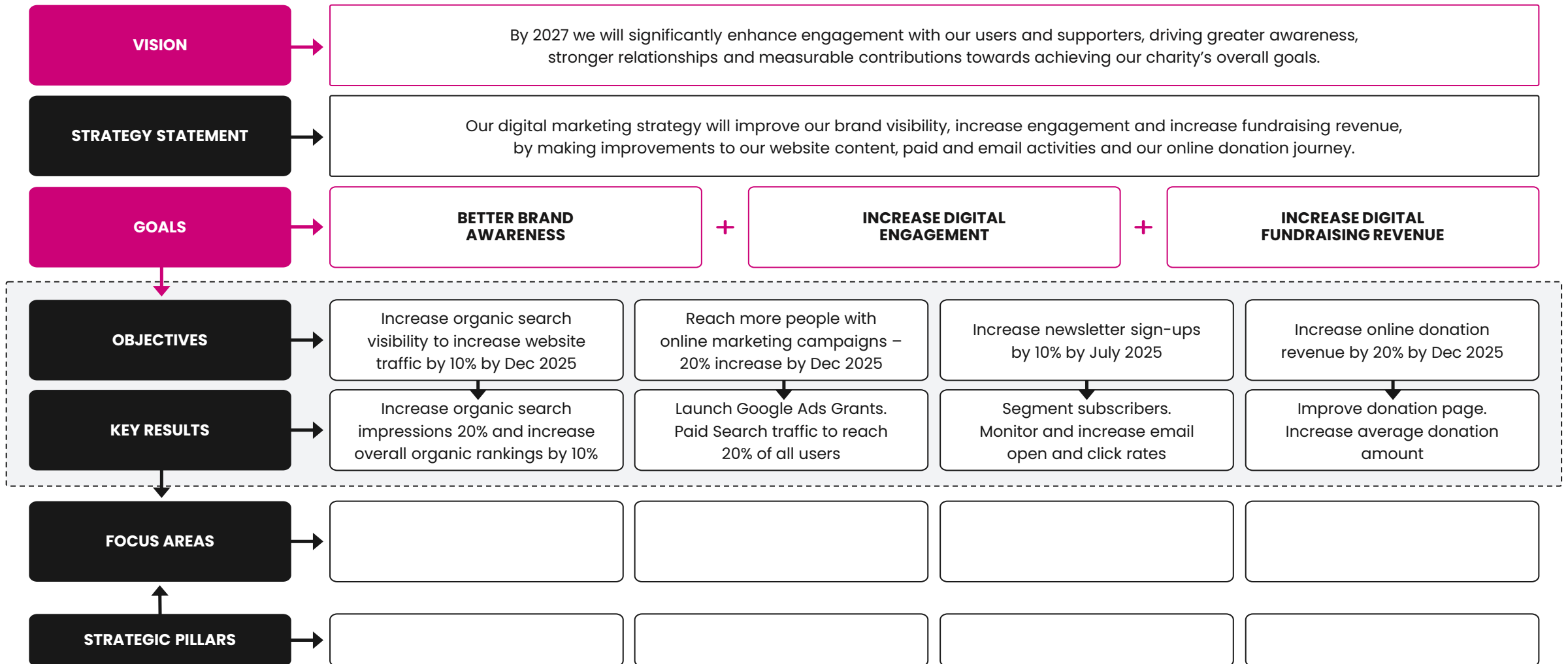
Key results are the measurable outcomes that help you track progress toward achieving your objectives. Typically represented as Key Performance Indicators (KPIs), these results give you clear metrics to monitor your performance and determine whether you are achieving your objectives.

Defining key results:

- **Use quantifiable metrics or soft metrics when needed:** Key results should focus on measurable data, like percentages, numbers, or specific benchmarks (e.g., "*Increase conversion rate by 20%*"). While most key results are numerical, you can include softer measures, like "*improve brand perception*" or "*boost customer satisfaction*"
- **Align with objectives:** Every key result should directly relate to the objective it supports, acting as a clear indicator of progress.
- **Track and adjust:** Regularly monitor your key results to gauge performance. If you're not meeting your targets, refine your strategy to improve outcomes.

By using Key Results, you create a clear framework to evaluate success and ensure your digital marketing strategy stays on track.

Strategy on a page: **Key results**



Strategy on a page: Focus areas

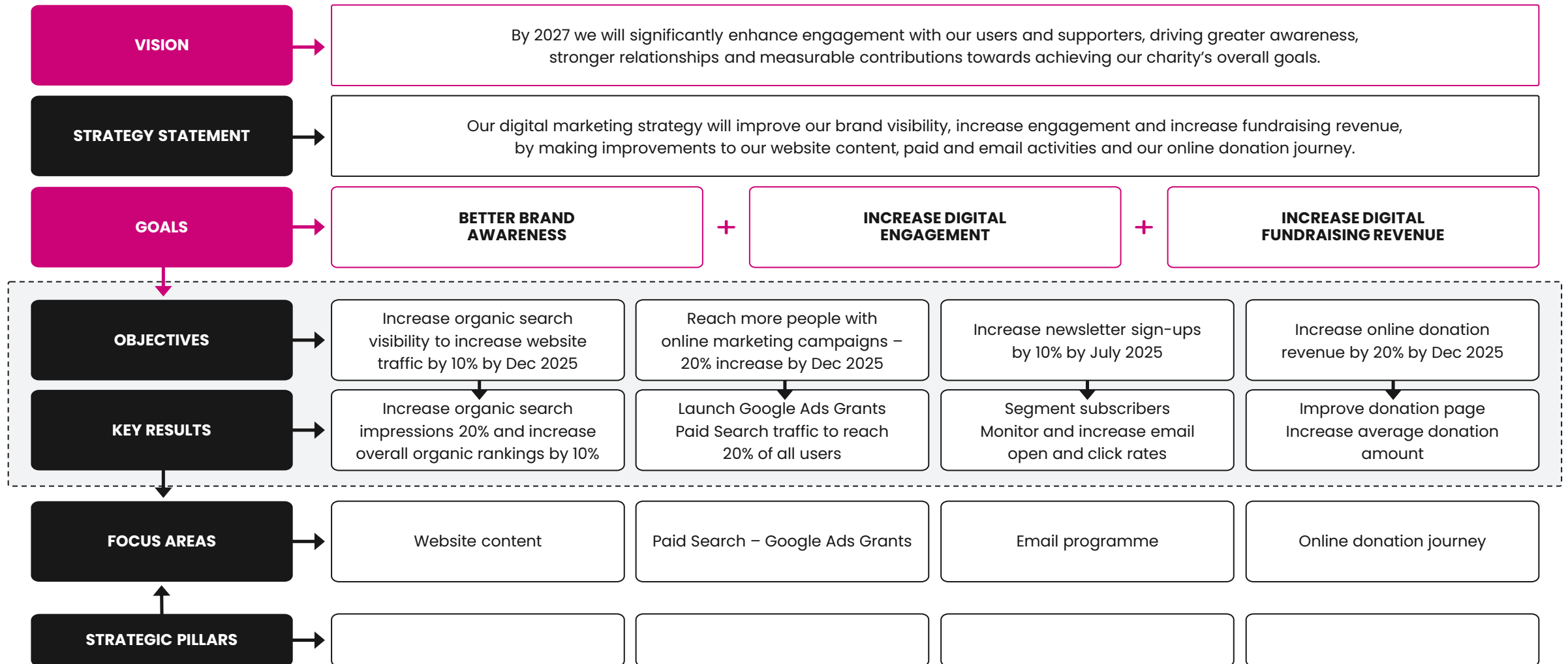
Focus areas highlight the key priorities where your digital marketing efforts and resources (time, budget, etc) should be directed. These areas give clarity on where to allocate resources for the greatest impact, ensuring you're concentrating on the most critical aspects of your strategy.

Defining focus areas:

- **Prioritise high-impact areas:** Identify the key activities or platforms that will have the biggest impact on achieving your goals (e.g., social media marketing, content creation, or email campaigns)
- **Balance strategic priorities with daily tasks:** While focusing on big initiatives, don't forget to manage ongoing, essential tasks that keep your digital marketing running smoothly – consider available time, budget, and team capacity
- **Adapt to shifting needs:** Regularly review your focus areas to ensure they remain relevant as your digital marketing landscape evolves
- **Align with goals and objectives:** Ensure that your focus areas directly support your top-level goals and the objectives you've set, helping to maximise your impact

Focusing on the right areas ensures that your team's efforts are strategically aligned and that resources are used effectively to achieve measurable results.

Strategy on a page: Focus areas



Strategy on a page: Pillars

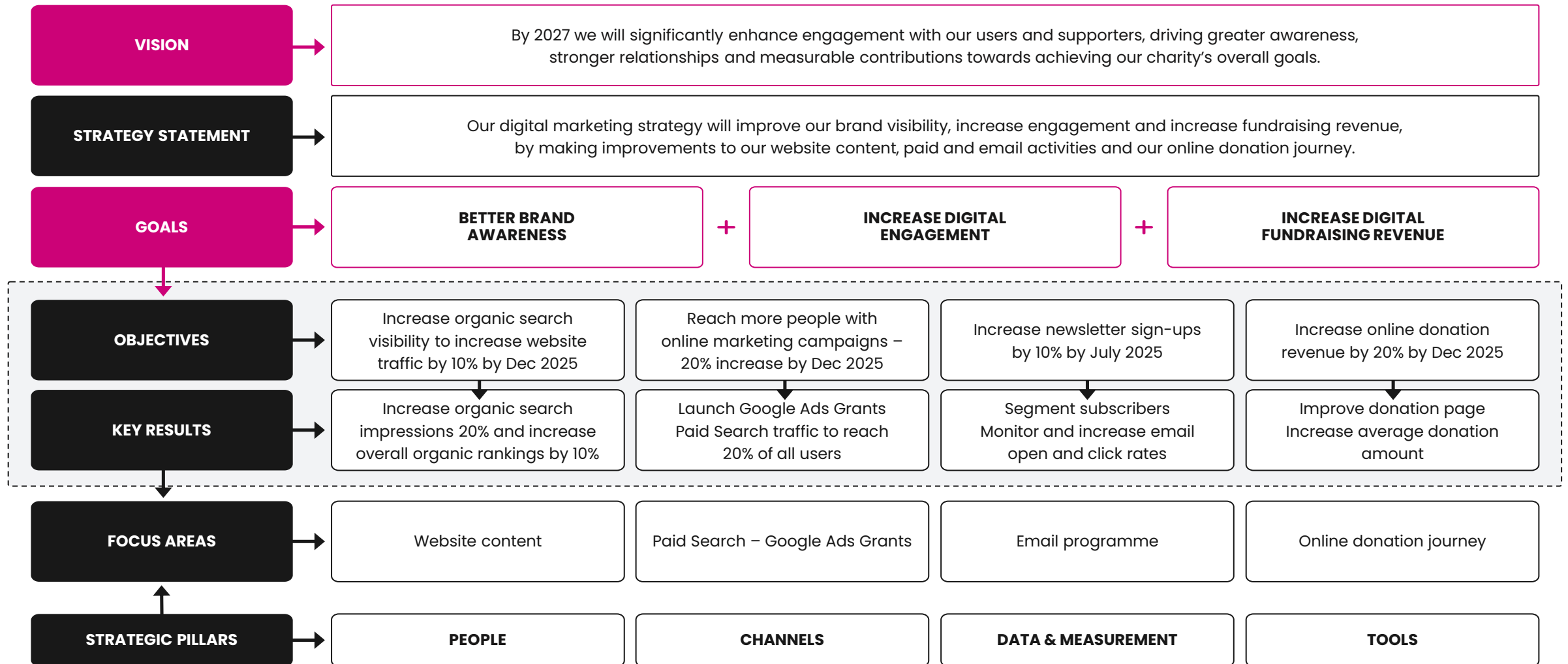
Strategic pillars are the internal elements that support and enable the success of your digital marketing strategy. These "enablers" could be processes, tools, skills, or technologies that need to be in place or improved to ensure the strategy is effective.

Defining focus areas:

- **Identify key enablers:** Consider what internal factors—such as technology, team skills, content resources, or processes—are necessary to support your strategy
- **Assess current capabilities:** Review your existing resources and identify any gaps. Are there areas that need improvement or investment to help execute your digital marketing efforts?
- **Create an improvement plan:** Develop a plan for enhancing these pillars, whether through training, adopting new tools, or refining processes
- **Align with strategy:** Make sure these pillars directly align with and support the goals and objectives of your digital marketing strategy

By focusing on strengthening your strategic pillars, you lay the groundwork for a successful digital marketing strategy that's both sustainable and impactful.

Strategy on a page: Strategic pillars



**Roll-out &
review stage**

2.3

Roll-out and review: **Bringing your strategy to life**

The roll-out and review stage is about making your strategy more than just a document—it's about putting it into action and ensuring it stays relevant over time. Sharing your strategy with the right people and gathering their buy-in is crucial for alignment and success.

Why this step is important:

- **Alignment across the organisation:** Sharing your strategy ensures everyone is working towards the same goals. This creates clarity and reduces duplication of effort
- **Encourages buy-in and collaboration:** Involving stakeholders helps build ownership of the strategy, making it more likely to succeed
- **Keeps your strategy relevant:** Regularly reviewing and refining ensures your strategy evolves alongside your charity's needs and the external environment
- **Tracks and demonstrates progress:** Monitoring effectiveness helps you show the impact of your efforts and adjust for better results

Communicating your strategy

Clear communication ensures everyone understands their role and feels aligned with your charity's vision and goals.

Six simple steps

Follow these simple steps to help you share your strategy effectively across your organisation.

1

Identify key stakeholders: Share your strategy with senior leaders, trustees, staff, and volunteers who will contribute to its success.

2

Tailor your communication to their role and interest: For example, senior leaders may want the high-level overview, while implementers need more detail.

3

Use accessible formats: Present your strategy in simple, clear language, and use visuals where possible (e.g., the one-page strategy framework).

4

Consider a mix of methods to share it: Team meetings, internal newsletters, or even a printed summary in the office.

5

Explain the “Why”: Help others understand how the strategy aligns with your charity’s mission and why it matters to their work.

6

Encourage questions and feedback: Create an open dialogue to ensure everyone feels invested and understands their role in achieving the goals.

Refining and reviewing your strategy

Since your strategy is a living document, regular reviews are essential to keep it relevant and effective. Updating your strategy allows you to respond to changes, seize new opportunities, and ensure it continues to align with your goals.

When to review your strategy

Here are some key reasons and prompts to help you determine when a review might be needed:

- **Changes in your charity's goals:** New campaigns, services, or focus areas may require adjustments to your strategy
- **Shifts in audience behaviour:** If your audience's preferences or behaviours change, your strategy should adapt to meet their needs
- **Performance metrics indicating issues:** If something isn't working—such as low engagement or poor results—it's time to re-evaluate
- **Emerging trends or opportunities:** New platforms, technologies, or trends in the charity sector may open doors to new approaches
- **Internal changes:** Changes in leadership, staff, or available resources can impact the feasibility of your strategy
- **Competitor activities:** Observing what's working for other charities in your space can provide insights for improvement
- **Time-based reviews:** Regularly scheduled reviews (e.g., quarterly or annually) ensure your strategy stays on track
- **Feedback from your team:** Input from colleagues, stakeholders, or trustees can highlight areas for improvement or new opportunities

These prompts can help keep your strategy aligned with your goals and external developments, ensuring continued success.

What comes next?

- Strategy into action
- Tips for success



Putting your strategy into action

Now that your strategy has been created, communicated, and refined, the focus shifts to ensuring it becomes an active part of your organisation's operations. The true value of your strategy lies in its ability to guide your charity's efforts and help you achieve your goals. It's not meant to sit on a shelf or in a file—it's a practical, evolving guide for your digital marketing efforts that informs decisions and inspires action.

Ensure your strategy becomes an integral part of your charity's day-to-day operations

Let's explore how to move from planning to action, so your strategy works as a practical, powerful tool for your charity's digital marketing success.

1

Embed your strategy into everyday operations:

- Share the strategy with your teams regularly and integrate it into team meetings or planning sessions
- Use it as a guide for prioritising digital marketing activities, ensuring alignment with your goals and objectives

2

Create an action plan:

- Break down the strategy into actionable steps or projects. Assign responsibilities and set timelines for each task

3

Track and measure success:

- Use your key results (KPIs) to monitor progress against objectives
- Collect and review performance data to assess how well you're meeting your goals

4

Report progress to stakeholders:

- Share updates on achievements, challenges, and next steps with trustees, senior leaders, and your team
- Use visuals, such as charts or dashboards, to make reports clear and engaging

5

Review and adjust:

- Schedule regular check-ins (e.g., quarterly or bi-annually) to revisit your strategy and adjust as needed
- Stay flexible and responsive to new opportunities or challenges that arise

6

Celebrate successes:

- Recognise milestones and achievements to keep your team motivated and invested in the strategy's success

Tips for a successful strategy

Start simple

Start simple and build on it. You can create a strategy for 6-12 months, then expand on this if required.

Make sure you use it

You've put in a lot of work in creating and launching it, so please don't let it sit on a shelf or in a computer drive.

Agree review points

Agree on when you are going to review the strategy to understand how it is performing. This might be quarterly, for example.

Be ambitious but realistic

You may feel pressure to grow and achieve more, but it's important to stay realistic about what can be accomplished.

Set a timeframe

Decide how long the strategy needs to be for. Some charities will align their digital strategy with their organisational one.

Right people, right time

Involve the right people, at the right time - getting stakeholder buy-in early in the process is often really useful.

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.

Your digital marketing strategy framework template



Digital Marketing Strategy

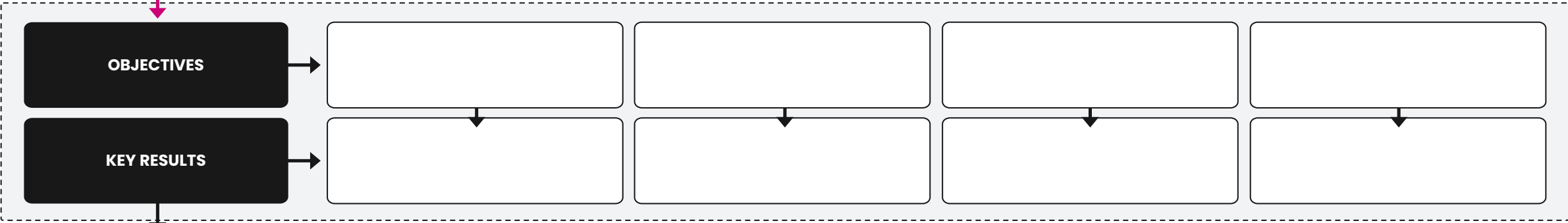
CHARITY

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STRATEGY STATEMENT

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FOCUS AREAS

STRATEGIC PILLARS

Thank you

Any questions

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

hello@charitywise.co.uk