Marketing is about understanding your community and using the tools available to speak most effectively to them.

The Church Marketing Plan Tool (CMPT) is designed to help your church leadership create its own unique and effective marketing plan through two phases.

**Phase 1**

Research + Vision = Understanding Yourself + Your Community

_Crafting a thoughtful game plan, then leveraging available assets, methods + platforms_

**Phase 2**

Strategy + Implementation =

CRAFTING A THOUGHTFUL GAME PLAN, THEN LEVERAGING AVAILABLE ASSETS, METHODS + PLATFORMS

As you and your team navigate through each section of the Church Marketing Plan Tool, look for the icons below to feature helpful content and next steps.

**Tools**
Powerful assets available to all United Methodist churches.

**Tips**
Provides relevant examples or details.

**Action Items**
Learning about new processes and assets is great, but what’s next?

**Before You Begin...**

**Assemble the Team!**

In the coming weeks, you and your team will be working toward a thoughtful strategy. Assign specific roles to facilitate the process and ensure work isn’t being done by one individual.

Your team should include:

**Senior Pastor** – Leadership and guidance throughout

**Marketing Plan Coordinator (MPC)** – A staff member or lay leader; gathers data, distributes surveys, helps input the marketing plan and coordinates communication.

**Administrative Assistant** – Contributes thoughts and records proceedings

**Trustees or Members of Committees** – Provide ideas and counsel from research
SECTION 1

STATISTICS & DEMOGRAPHICS: Get the numbers...

The following reports should be requested 4-6 weeks before a one-day Marketing Team Retreat. Your senior pastor or the marketing plan coordinator should gather a series of reports that will help build the foundation of your plan. The best part? Your reports are free, and simple to request.

STEP 1: ORDER YOUR CHURCH PROFILE

At UMData.org, you can access statistics about your church ranging from membership to giving to total income and more. To view the data, click on the “Churches” button in the upper left corner of the page. On the page following, enter your church’s information and click “Search.” It’s that simple.

STEP 2: ORDER YOUR COMMUNITY PROFILE

Additionally, your annual conference communicator or United Methodist Communications can provide an in-depth report detailing the makeup of your specific community. Upon request, United Methodist Communications will compile demographic and lifestyle data about your area. There is no charge to United Methodist churches for this service. To ask for your free report(s), contact the Research and Local Church Outreach department at UMComResearch@umcom.org with the street address of your church.

YOUR COMMUNITY PROFILE WILL INCLUDE:

- A letter explaining how to understand your data.
- An Executive Report, which carries data about your community including population growth, income and more. This report studies the current state and future of your church’s community.
- A quadrennial report, which examines religious preferences and attitudes every four years.

STEP 3: PRINT YOUR CHURCH BUDGET

Knowing your available financial resources is critical. These numbers will help your team understand which marketing tactics are realistic given the costs.

NOTE: When these reports are ready, forward them to your Marketing Team in advance of your one-day retreat. This will help team members complete the brief questions in their homework and prepare for discussion times.
SECTION 2

CHURCH SURVEY: Understanding your local body

In every organization, it’s useful to take the temperature of the people who make the work happen. Knowing how they feel about the cause itself and the effort they’re putting in can give any organization a keen understanding of its internal health. Here are two useful tools for keeping your finger on the pulse of your church:

CHURCH MEMBER SURVEY

What do your members and staff see as the strengths and weaknesses of your church? Why do they attend? While conducting a survey may appear to be a large task, United Methodist Communications took the liberty of preparing one for United Methodist churches through surveymonkey.com.

- To access the survey, go to this page, fill out the form in the Tools sidebar and click “Get your PDF file.” You’ll receive a copy of the survey, and either use the survey as is (we will send you the link for your use), or you can send your request for changes to UMComResearch@UMCom.org. Our staff will make the adjustments and send you a link to the revised survey.
- Some of your church members all but live on their smartphones, tablets and laptops. Surveymonkey.com allows you to email those members the link to the survey. However, other church members may prefer paper. Consider printing the survey, placing it in your Sunday bulletins and provide a collection bin in the narthex.
- Provide both email and printed methods of survey delivery during a two-week timeframe. Consider a goal of receiving responses from 50 percent of your congregation. For surveys completed on paper, a Marketing Team staff member (the coordinator or administrative assistant) should input the responses into the survey website.
- After the data has been entered into surveymonkey.com, United Methodist Communications can help your church interpret the findings. In fact, one of our staff members will even walk you through the process. Contact our Research Team at UMComResearch@umcom.org to learn more.

SMALL GROUP INTERVIEWS

While online and paper surveys are valuable tools for information gathering, nothing replaces face-to-face conversation. Personal anecdotes about spiritual growth speak to the heart of your church is too important to miss as part of your background research in Phase 1. Here are a few tips for scheduling and conducting interviews:

- Ask the senior pastor to make an announcement one week ahead and the week of the interviews. This gives members advance notice and explains why the discussions are being conducted. The senior pastor should also state that all responses will be considered anonymous and no names will be recorded.
- Conducting small group interviews allows the Marketing Team member to ask questions during a brief time on a Sunday or Wednesday. A divide-and-conquer approach would be best, with the Marketing Team splitting up to ask church members and attenders in adult Sunday school, youth groups and ministry groups about their experiences in your congregation.
- There are no expectations in terms of participation. Members are not required to answer any questions.
- The interviewer should take notes or bring someone along to help him/her faithfully document key moments.
- These interviews should be short (no more than 20 minutes), and each small group should receive the same questions. This will allow for apples-to-apples comparisons. Conducting the interviews during small group times will help participants frame their answers in the proper context.

NOTE: We encourage your church to schedule its marketing retreat to occur in a reasonable period of time after completion of interviews and research. This will allow time for summary of results and for team members to prepare.

Upon completing the discussion, the interviewer should thank the group for its time and for helping the church make a greater impact. After each Marketing Team member completes an
It can be easy to have a highly optimistic view about community perceptions of your church. To be fair, many churches are already seen in the most positive light by their communities. Yours is probably among them. For the CMPT, we want to speak more to perceptions that are simply unknown (and even to those impressions that are less than stellar). This will fuel your understanding of the community.

A person’s perception about your church will be based on what she or he sees, hears and knows in combination with her/his background and experiences. In other words, influences beyond your control. These opinions are valuable to your marketing plan as a source of information you can’t get through the online or paper surveys previously mentioned.

As a church leader, you know the kind of impact you want your church to make, yet that may or may not match the perception held by your congregation and the community. Understanding what your community feels and thinks about your church will help you build a marketing plan that reflects the church’s vision and Core Values in ways that connect with people.

To put a fine point on it, strategy goes toward mobilizing your congregation to meet your goals if your congregation’s perception aligns with your Vision. If the church’s perception does not match the vision, then strategy goes toward either inspiring your church to own the vision or even modifying your Vision toward what already excites your congregation.

DISCUSSIONS IN THE COMMUNITY

Though hearing from within the church can yield insights, everyday conversations with people in your community can be eye-openers. More to the point, a brief talk with a local acquaintance could reveal a key perception about your church that members and attenders may be too polite to offer.

Perhaps that quick-yet-incisive chat occurs at the grocery store, at a restaurant, or as you’re at a sporting event. The goal is to learn from voices that are not heard in your church.

Furthermore, your church speaks through your people, your building, your communications and any outside groups you partner with. In so many ways, the impressions given by your church coalesce into the perceptions held by your community. Understanding these opinions helps you to identify your church’s strengths and areas for improvement.

This element of the CMPT isn’t meant to make your team members anxious. Understandably, some members will feel more comfortable than others with asking neighbors, friends or even strangers about your church. That’s why this conversational exchange is intended to be brief.

A reasonable goal may be three such conversations for each Marketing Team member in one week. To simplify this, each team member would ask the same three questions in each discussion about perceptions of your church:

- Have you heard about (insert the name of your church)?
- Do you have any impressions about the church?
- Have you heard of any ways in which it serves the community?

Equipped with those short questions, your team can collect useful quotes from a diversity of local residents. These responses may be an interesting contrast to the interviews from your church.
COMMUNITY NEEDS

Gaining insights from people who live nearby can give you a perspective you couldn’t get otherwise. Now let’s fuse those conversations with some data to paint a more complete picture.

The first step toward recognizing the services that are lacking for individuals, groups or the entire community is found in your demographics report. With this information, you profit from a wider view on topics such as age, ethnicity, incomes, education, housing and more. This report provides knowledge you’re unlikely to get with the naked eye – and establishes a baseline for understanding where needs are still to be met.

These community needs are opportunities for your congregation to connect people to the hope of Christ while addressing basic human needs or developmental needs. Understanding these needs helps churches to meet people where they are as opposed to creating offerings and messages that we think they would connect with.

COMMUNITY NEEDS MAY INCLUDE:

- Physical needs: food, clothing, shelter, medical care, pregnancy care; perhaps people or groups have a need for meeting or facilities space (gym, library, kids’ areas), after-school care.
- Relational needs: friendship, life purpose/direction, a way to use their time and talents.
- Socioeconomic needs: abuse protection or healing, freedom from addiction, financial advice, marital or parental counseling.
- Circumstantial needs: widowed, divorced, job training, language training, demanding job situation.

Below are examples of how two churches learned of and addressed community needs.

**EXAMPLE 1:**
A church in an area with a high number of retired people may assume they should provide medical services or social events for senior adults. A thorough community-needs assessment reveals that the primary need for these senior adults is to feel useful. So the church’s marketing plan features ideas to connect people with local volunteer opportunities and ways to provide support to global efforts.

**EXAMPLE 2:**
A church located in a hurricane-prone area has a beautiful building with a long history. Through discussions with community leaders, they learn there is a need for an emergency shelter. The church offers its building and hosts hurricane preparation clinics, conducted by the local emergency services.

Note the effect of needs assessments and discussions in both examples. These opportunities led to important and effective changes made by these churches to better serve their communities.

As part of your research process, it’s vital to appreciate the role of prayer. When you and the members of the Marketing Team shop, eat at a restaurant, attend community events, etc., pray for God to open your eyes so you may view your community from a new angle.
GATHERING OF COMMUNITY LEADERS

NOTE: If timing and feasibility become issues, this step is not mandatory. Each Marketing Team should determine the need for meeting with community leaders about perceptions of the church.

What could a local doctor or nurse tell you about your church? What advice would the principal of the elementary school offer about your children’s department? Could the TV news reporter give ideas for publicity?

These are all useful questions. To push this idea further, imagine a gathering of community leaders to discuss perceptions of your church and how you can meet local needs. Perhaps you would come together for one weekday breakfast social (or other meal) at your church. A meeting of community leaders would generate a variety of opinions about your church based on the jobs and life experiences of those who attend the event.

Intrigued? Good. Now, how do you make it happen?

We suggest you consider two key elements: 1) hosting the event and 2) who to invite.

HOST THE GATHERING

During the event, the Marketing Team may wish to give a brief overview about the gathering, then ask questions and facilitate the conversation. A member of the Marketing Team should take notes. General questions to ask may include:

- What are the key strengths of our community?
- What are the biggest challenges our community is facing right now?
- What do your invitees know about your church?
- What are ways our church can meet our community’s needs?
- If you have an impression about our church, please share your thoughts.

A member of the Marketing Team will prepare a report summarizing key thoughts from the event to distribute to team members in advance of your one-day marketing experience.

WHO TO INVITE

Marketing Team members may wish to divide the guest list into categories such as social services and business. The social services group may include government leaders (such as the mayor, city planner, commissioners, head of school board, etc.), members of the educational community, the Chamber of Commerce and local nonprofits.

The business group may include owners/managers of firms in health care, retail, food service/restaurants and more. This truly is a case of “the more, the merrier.”

After your team has established the guest list, be sure to craft an email or voicemail invitation that explains the event, requests a response and provides your contact information. Then divide the guest/contact list equally among your Marketing Team members.
SECTION 4

HOMEWORK: Values and vision

Core Values are your church’s guiding principles. These ideas state who you are as a church, no matter what changes occur in your strategies, surroundings and circumstances. Core Values detail the historical and current positive elements of your church’s personality while also describing what is most important to your church and what makes your church unique.

Exploring your church’s Core Values will provide guidance as you develop messages and strategies that align with the unique nature of your congregation. During this moment in the process, keep these three points in mind: Core Values are not beliefs. Beliefs are theology. Values are personality.

Beware of aspiring to values as you wish them to be! Focus on your church’s true self – not on an alternate version of your church or on other churches’ identities. Check your ego and personal faith history at the door. Your church’s Core Values should be the result of a shared agreement. Let’s continue to the next step and discuss your church as it is now and in the future…

PHASE 1: VISION

Our Values & Vision Worksheet offers questions to encourage your thoughts about the present and future of your church. Please bring your responses to the marketing retreat.

VISION

This one word has been known to perplex small churches and large companies. As an organization works to define its vision, this single question should come first:

WHAT IS A VISION STATEMENT?

For starters, a Vision Statement can be a single sentence or a short paragraph. Beyond that, this statement should provide motivation, a big-picture dream, and an idea that carries your church 10-20 years into the future. A meaningful Vision Statement leads to higher engagement for all parties involved.

Vision also respects the Core Values of your church and points the congregation toward a desired, future destination. These forward-thinking ideas can tighten your focus so you mobilize your resources. Most pastors have a personal vision for their church. To make that vision a reality, staff and laity must work in concert. In fact, your vision will help you choose the most effective strategies to reach your community.

The following two examples illustrate how a Vision Statement can form the foundation of a strategy and then tactics.

EXAMPLE 1: A church’s Vision Statement is to “transform spiritually distracted families in our local community to know and love God.” The church’s strategy then seeks to reach busy moms driving kids around town. Tactics to accomplish that strategy include:

- radio spots before and after school,
- a summer arts camp for kids, and
- showcasing their café’s free wireless so Dad can work while waiting for his son to play basketball.

EXAMPLE 2: A church’s Vision Statement is to “find and appreciate the diversity among God’s creation and show everyone how to love God and love others.” The church’s strategy focuses on minorities who are seeking a church. Tactics will include:

- a free English as a second language program,
- bilingual flyers posted at local ethnic grocery stores and restaurants, illustrating the church’s openness to diversity, and
- hosting a yearly ethnic festival at the church and encouraging the minority community to participate and attend.

As you progress through the CMPT, remember that your marketing plan has the most potential for success if church leaders clearly communicate priorities that are within the church’s Core Values and Vision.
PHASE 2: BEFORE YOU BEGIN

Your Marketing Team stands ready for Phase 2 – now halfway through your work.

To get the full benefit of the next steps in this project, be sure your team members have filled out the worksheet from Phase 1 and read the reports provided. Their ideas are the foundation on which Phase 2 is built. Going forward, your team will take a realistic look at your church’s successes and areas for improvement in relation to your community and the people you wish to reach. You then develop your strategies and the goals needed to achieve them.

This is followed by an assessment of the resources available to your church and development of a working marketing plan. The final document will carry all of the work your team put forth, and it will give your members a vision of what to expect going forward in terms of communications.

REVIEW ITEMS

- Complete Vision & Values Worksheet
- Review Church Profile
- Review Community Profile
- Review Church Member Survey Results
- Review Small Group Interview Results
- Review Community Survey Results
PHASE 2

STRATEGY + IMPLEMENTATION = LEVERAGING AVAILABLE ASSETS, METHODS + PLATFORMS

SECTION 1

STRENGTHS, CHALLENGES & OPPORTUNITIES:
A LOOK IN THE MIRROR

Between the survey research you’ve read from Phase 1 and the work you’ve completed about your church’s Core Values and Vision, you’re equipped for the next step: Strengths, Challenges and Opportunities.

Below you will find a fictional summary of a church’s current status, which leads to a Strengths/Challenges/Opportunities (SCO) assessment for that church.

You will see the church occasionally referred to as “Generic UMC.” All of their specifics – from their target audience to age ranges – are only meant to provide a fictional example.

Note how the specifics in their SCO relate to everything from the church’s location to events and from maintenance to church programs.

STATUS

During the research portion of its Marketing Plan process, Generic UMC learns the percentage of young adults (ages 18-35) in the area is far higher than the percentage represented in their church. While the church has ministries directed toward young adults, those efforts have become stagnant. Using surveys, the church discovers a strong desire among young adults with small children (ages 25-34) to meet social services needs.

The church realizes that their programs for young adults are purely for social purposes. Yet the church offers several ministries focused on social service needs.

As the Marketing Team begins its SCO assessment, they take into consideration the young adults in the area and identify the following strengths and challenges.

STRENGTHS

CHURCH LOCATION:
Generic UMC is located in an established neighborhood of post-war bungalow homes that is experiencing renewal. Many young couples have moved to the area to rehab and live in these homes. It is also located next to a public elementary school and offers free tutoring to children in grades 5 and 6. The highlight of every summer is the annual 4th of July celebration.

Food, games, a free concert and fireworks draw a large crowd. It’s a major fellowship event for church members and a fun, free social gathering for the people of the community.
CHALLENGES

LIMITED OPTIONS:
Church leaders examine their current programs for young adults and realize that the only option is an advanced Sunday morning Bible study class working through the Bible in a two-year curriculum. This is not an easy point of entry to the church for newer people; it could be an opportunity to develop a more “contemporary” issues class.

FRUSTRATING RESULTS:
While the annual 4th of July celebration brings many visitors to the grounds, church leaders see very limited results from the effort in terms of any bump in attendance following the event. People come, but they don’t connect or get involved with the church. Many question the expense and effort for this big party.

PLAYGROUND EQUIPMENT:
While the grounds of Generic UMC are attractive and tidy, the church playground equipment is outdated and, in some cases, in disrepair. Several broken swings, a rusted slide and inadequate safety ground coverings create liability concerns, an unsafe environment and give the impression that the church does not value children.

OPPORTUNITIES

TUTORING PROGRAM:
Generic UMC has a strong relationship with a nearby public elementary school where the church’s seniors group offers tutoring for students in grades 5 and 6. They would like to serve more children, but the number of interested senior adults has reached a plateau. Church leaders are considering expanding the program to include young adults as tutors.

HANDYMAN MINISTRY:
Over a dozen retired men from the congregation serve together, offering free handyman services for needs from within the congregation. As church leaders look around their neighborhood, they realize that many of the young couples moving to the neighborhood are tackling home remodeling projects. Church leaders consider growing the handyman ministry to include free “do-it-yourself” clinics to teach aspiring remodelers skills like carpentry, plumbing, electrical, tile, roofing, etc.
NOW IT’S YOUR TURN
See our downloadable Strengths/Challenges/Opportunities worksheet for a brief series of questions. By answering those questions, you can provide your thoughts and ideas to foster conversation during this part of your team’s meeting.

HI! HAVE WE MET?
Understanding the life and the needs of the people you’re speaking to is essential to your marketing plan. Thus, defining your audience means answering some key questions.

Do you know who you’re trying to reach – and what motivates them? Yes, you want everyone in your community to come to know and love Jesus. Yet, if you don’t center your efforts, your work will be wasted.

The majority of your energy should go toward the people you can impact and their interests, while you still value and serve all audiences.

Does the data point to your audience? In Phase 1, you should have requested a demographics report from United Methodist Communications. The demographic information is census-based. With this report – coupled with guidance from your surveys, Core Values and Vision – you can identify the audience(s) you hope to reach.

Using your demographic report, ask: Are there enough people to reach? That may seem an odd question, yet it can help to prevent your team from seeking the wrong audience. Because once you know your audience, it’s easier to choose the right messages.

What benefits does your church provide? Will your services, events and programs speak to the needs and interests of your chosen audience? If not, consider this your opportunity to better align your church with the audience.

SECTION 2
STRATEGY & GOALS: a look in the mirror

Now that you’ve considered and cataloged the strengths, challenges and opportunities facing your church and defined your audience, let’s take the next step.

Your strategy defines what you want to accomplish within a designated period of time – and your Vision Statement is of little use without it. As you move forward, consider three elements:

- With your SCO assessment in mind, look to what your church is already doing well. This provides confidence and a sense of what strategies and steps have worked in the past. Address your challenges and seek to unearth areas for improvement or identify under-resourced programs. This could even be the time to think about simplifying the number of ministries or projects offered by your church as a way of bringing greater focus to your available resources.

- The intersection of strengths and challenges is opportunity. Your church may wish to study expanding one of its ministries or developing a new approach. In this moment, watch for ideas that generate excitement with the Marketing Team and discuss if church members may be enlisted to provide help.

The following strategy statement is based on one of the opportunities noted in the earlier SCO assessment.

- Example of a strategy statement: Generic UMC will reach young adults and children by expanding its tutoring program as a service ministry. Because of our proximity to an elementary school, we want to expand our successful tutoring program to include young adults.

Note how the strategy statement recognizes strengths (current tutoring program and location), a challenge (engaging young adults) and an opportunity (young adults wish to help). Your church’s strategy will read differently and address your own unique needs. There is no established template for a strategy as long as it provides the direction your church needs.
GOALS GIVE YOU A PLAN, TACTICS GIVE YOU THE STEPS

So after you craft a strategy, what’s next? Your church knows what it wants to accomplish, and now you need to imagine what’s necessary to achieve your strategy.

Those thoughts will give rise to your goals. To begin with, a goal is a statement describing what your church will achieve after your marketing plan has been established.

A goal is also an extension of your strategy and an outcome of your church’s Core Values and Vision. Your goal may be a short, simple statement or several sentences in length. The choice is yours, and your church may have more than one goal in its marketing plan.

And yet your church’s goals are not necessarily set in stone. In fact, it’s better to picture rubber cement—a strong material that can still be re-sculpted as needed. This allows your church to alter its approaches when conditions warrant changes. Thus, goals may be adaptable and offer opportunities for spiritual growth and leadership development.

So let’s discuss the nature and components of what is called a S.M.A.R.T. goal.

- **Specific**: A specific goal is more likely to be accomplished than a general goal. To be specific, a goal should state an end result, who is involved, where (if applicable), when the goal will be achieved, and how it works toward your church’s Vision.

- **Measurable**: This is where numbers come into play as you quantify success through questions such as, “How much?” “How many?” and “How will I know when it is accomplished?”

- **Attainable**: Your church should set its goals high enough to challenge staff and members, but not so high as to be unreasonable. Set goals that inspire you—and allow for celebrations along the way.

- **Realistic**: Craft your goals within the reality of your current context and resources. Consider the time, talents, financial resources and energies of the people who will take part.

- **Timely**: A goal should adhere to a specified timeframe. Without a timeframe, there is no urgency and no one is held accountable. Whether your goal is tied to an annual event or stands on its own, an agreed-to date for its conclusion should compel your staff and volunteers to get moving.

**FOR EXAMPLE**: See the following example derived from the previous strategy statement:

**Goal**: Within four months, our church will involve at least five young adults in our tutoring program, which will begin one month after the start of the school year. Our church will use promotional opportunities during the summer to spread the word throughout the community.

In just two sentences, this goal covers a lot of ground (how many young adults should participate, a timeframe and deadline, an attainable benchmark). So this goal does meet multiple elements of a S.M.A.R.T. goal.

From here, the following actions may help to fulfill this goal:

- Build a list of communications tactics to be carried out during the summer with tasks assigned to staff or volunteers in the church.
- Request the senior pastor’s help in communicating with the school’s principal and counselors and in promoting this ministry during Sunday and Wednesday services.
- Schedule “thank you” communications or an event in honor of volunteers in the program.
- Develop a Plan B approach should there be difficulty in attracting the tutors needed. The church should consider…
  - Are there civic groups that would be willing to supply volunteers?
  - Would peer-to-peer tutoring be acceptable?

This is by no means a complete list of steps needed. Notice, though, how the goal draws on strengths, challenges and opportunities, and the action steps support the goal.
SECTION 3

YOUR CHURCH’S RESOURCES: People, money & time

Does your church have the funds, human resources, time and talents to pursue its goals?

This thought exercise isn’t meant to rain on your parade. Rather, this is the point where your Marketing Team looks in the mirror and asks, “Can we do this?” Knowing your resources helps you determine if your goals are realistic.

To accomplish this, your team should gather the following information. The data will reveal how your church’s resources are currently allocated.

- **Budget**: Where do you spend money?
- **Personnel**: Where do your people focus their time?
- **Facilities usage**: What types of activities take place in your building/campus?
- **Communications emphasis**: What types of things do you emphasize through verbal, print and e-communication?

Your Marketing Team should review the data in light of your church’s Vision and goals with two questions in mind: What does your resource allocation communicate about your congregation? In light of your strategy, how will your church (or should your church) reallocate resources?

The CMPT offers a downloadable chart to allocate resources similar to the one shown below. This image is only a guide, and the chart your team creates will be unique to your needs. During your discussions, team members should contribute their ideas to the content of the chart. The Marketing Coordinator will input the final, agreed-to content in a master document.

SECTION 4

PLANNING FOR SUCCESS: What does success look like?

Your measurements for success will come directly from the results of work toward your goals. That’s the simplest way to rate your progress. Perhaps those measurements will include growth in attendance or giving, a new focus on ministries or small groups. The choice is yours. Having stated that, some advice on the foundation of your metrics may help:

- **Goals that carry a financial focus will be easy to measure in terms of numbers. The question underlying any financial goal, however, is whether it was the implementation of your marketing plan that led to success.**

- **Likewise, progress toward attendance goals may be simple to assess. Numbers will tell the tale. New and returning attenders will provide that metric. Be sure to ask members, attenders and visitors if they have received the communications sent from your church. This can be managed simply through surveymonkey.com using an email with 1 to 3 questions.**

- **Rating improvements in spiritual growth may be the most difficult. How does one put numbers to faith? Thus, choosing your metrics and how to compile them is key. Perhaps this work requires more than one way to find answers. Are your small groups maintaining and/or growing their attendance? Do your members feel that their prayer habits have led them to a closer relationship with God? A mixture of numbers-based and opinion-based questions may yield your best data regarding spiritual growth.**
PHASE 2: DELIVERABLES

The Marketing Plan Coordinator or Administrative Assistant will record the team’s final decisions on the following:

- Strengths/Challenges/Opportunities analysis
- Key Audience
- Strategy
- Goal(s)
- Tactics
- Resources
- Metrics/Evaluation

The Marketing Plan Coordinator will compile group input from your retreat into the downloadable Master Planning Chart. The chart carries details ranging from goals to tactics to available resources and more.

PLANNING YOUR MARKETING RETREAT

Every church will be different in its usage and pace of this meeting. However, the following suggestions for topics and time may help to keep the momentum going.

We do recommend that you reserve the equivalent of one business day (8 a.m.–5 p.m.) to cover your meeting. The list on the next page would apply to your discussions during the retreat:

FOUNDATION: RESEARCH & VISION

- 30-minute – Introduction: Your senior pastor and marketing plan coordinator explain what the Marketing Team plans to accomplish.
- 90 minutes – Core Values: Your team should talk about the principles that guide your church and the results of your survey and interviews. Your group should work toward consensus on no more than five Core Values.
- 90 minutes – Vision: Your outcome should be a Vision Statement that offers guidance for your church.

STRATEGY & IMPLEMENTATION

- 15-minutes – Introduction: Now that you’re equipped with the background research, Core Values and Vision, turn your focus to the development of a marketing plan for your church.
- 75 minutes – Strengths/Challenges/Opportunities: Your entire team should dream big, then discuss how to apply those dreams to the real-life situations facing your church and community.
- 30 minutes – Your Target Audience: Who does your church wish to reach with its communications?
- 60 minutes – Strategies: How does your church reach for its goals? Which team members take ownership of which roles? When does this happen, and what are the steps? Let us help you arrive at the answers with our downloadable Marketing Plan Chart and individual team member Tactics Worksheet.
- 60 minutes – Goals: Remember, your goal(s) may be a short and simple statement or even a paragraph. The choice is yours – and your church may have more than one goal in its marketing plan. Just be sure your goal is adaptable as time, resources and needs change.
- 30 minutes – Metrics: What does success look like? Attach numbers or some other measurable method to your goals and tactics.

By the end of your meeting, your team should have all of the content needed for a working draft of your church’s Marketing Plan.
CONGRATULATIONS!
Your team has nearly reached the finish line. There are only a few remaining steps:

- **Reach agreement as a team.** Now that your draft is complete, schedule a deadline to finalize the marketing plan. Your Master Planning Chart should reflect the efforts made by your whole team.

- **Partner with your leadership.** Enlist your senior pastor as the chief sponsor, cheerleader, and communicator of the marketing plan.

- **Make a big reveal.** With your senior pastor’s input, select a time to unveil the plan to the congregation – and encourage their involvement.

- **Feed fresh ideas to your church’s leaders.** Keep the momentum going by equipping your clergy and staff with tips on communications, outreach and new technology. Our monthly *MyCom e-newsletter* does that and more. Sign up online at [UMCom.org/news/mycom-tips-enewsletter](http://UMCom.org/news/mycom-tips-enewsletter).