



Growing your Social Enterprise:

Pobal Training Initiative

Delivered by Carmichael Centre for
Voluntary Groups

Facilitated by
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Training & Consultancy

AGENDA – Day 1

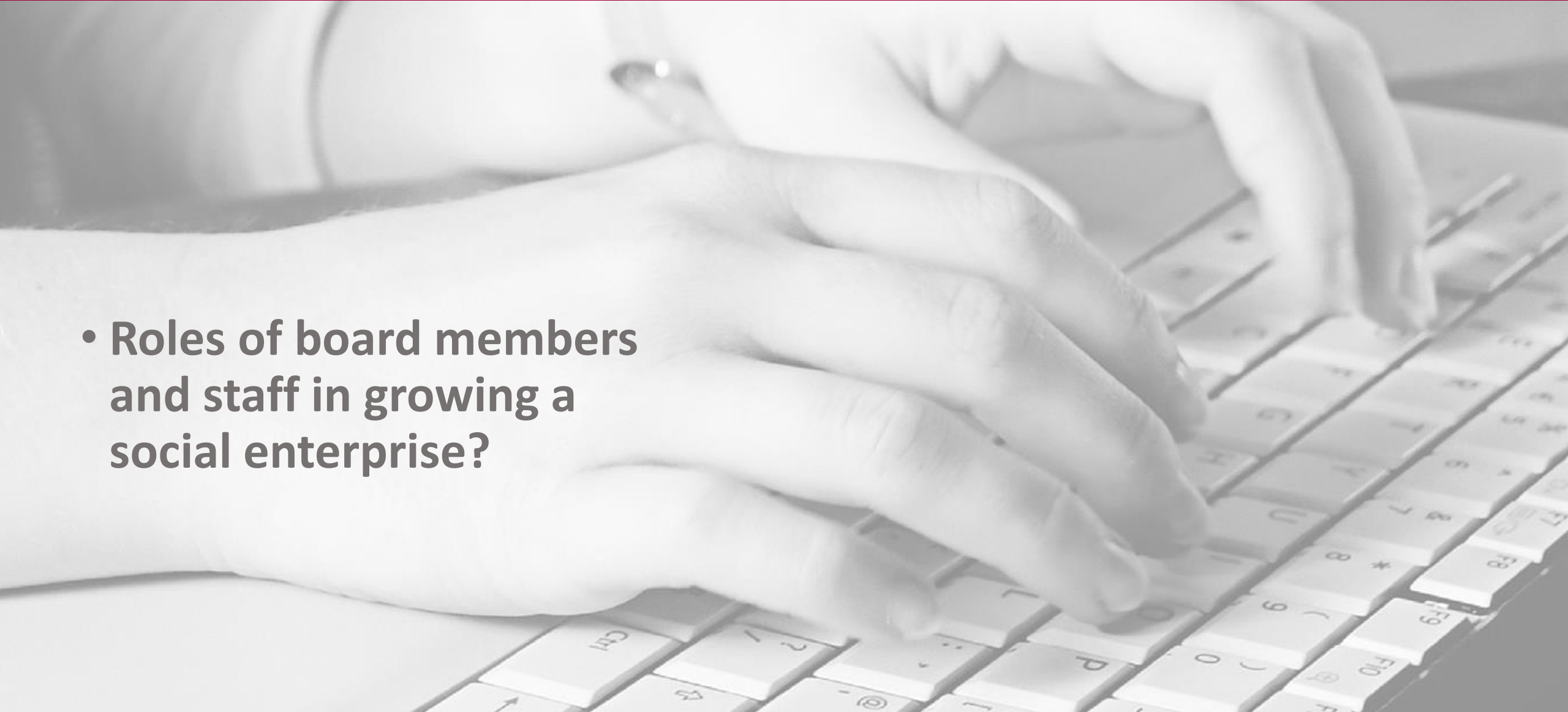
- Workshop Structure: Day 1 – Strategy and Day 2 - Marketing
- The importance of people in generating trading income
- Business Model Canvas
- Market Research Process
- Positioning a Business
- Costing Products and Services

AGENDA – Day 2

- Branding: Influencing Customer Perceptions
- The Marketing Mix
- Elements of Marketing and Sales Campaign Action Plans
- Pitching Corporate Clients
- Setting Performance Metrics
- Next Steps for your organisation

Setting the Context

- **Roles of board members and staff in growing a social enterprise?**



Scaling Local Opportunities

- What is the extent of your organisation's social network?

(How strong are your ties to your local community?)

Take a moment to consider this question.

Who is the Intrapreneur?

- Look at a person's:
- Prior experience
- Cognitive factors
- Social networks
- Creativity



Generating Trading Income – Quick Wins

Questions:

- What percentage of income comes from existing products or services?
- How much capacity does this income represent?
- What extra capacity needs to be filled?
- How much of the local market does the existing revenue account for?
- How are you communicating with potential customers?

Business Model Canvas

- Nine elements to consider
- What is your enterprise's value proposition? If you were a commercial enterprise would the value proposition be different?
- *Exercise: Construct a Business Model Canvas*

Market Research Process – 7 Steps

- Define the research problem
- Identify the information required
- Select target customer groups (segment)
- Design data collection methods
- Choose the survey sample size and participants
- Conduct research
- Analyse findings and communicate results

Market Research Process - Exercise

- How can we generate trading income in a community facility?
 - How to identify new customers?
 - How to sell additional services to existing customers?
- Can community maps help?
 - What opportunities does your community map suggest?
 - What gaps appear to exist in local service provision?

Validating Opportunities

Opportunity Vs Idea?

- A favourable set of circumstances that creates a need for a new product or service
- Qualities of opportunity: attractiveness, timeliness, durability, creates value

Validating Opportunities

Selecting an Idea:

- How much money and capital do you require?
- How big is the demand for your product or service?
- How much of this demand is currently being met and by whom?
- Do you have the necessary experience?
- Are there any legal restrictions to contend with?
- Are you interested in the business idea?
- What are the resource implications of pursuing opportunities?

Business Strategies

- Emergent versus deliberate business strategies
- SWOT Analysis: matching enterprise strengths with market opportunities
- Market development and/or product development?

Market Positioning Strategies

- Attribute Positioning – years in business, size, charity
- Benefit Positioning – value attributed to benefits
- Application Positioning – uses
- User Positioning – who
- Competitor Positioning – outperform
- Best Value Positioning – best value product/service

Question: *How to position a service business?*

Quick Re-cap

- What are your takeaways from the workshop thus far and implications for your social enterprise?



Product/Service Costing

- Typical Fixed and Variable Costs in a business
- Factoring in pre and post sales service costs
- Calculating product costs, service delivery costs and sales margins

Branding and Brand Definitions

Brand is the sum total of how someone perceives a particular organisation. **Branding** is about shaping that perception.

Ashley Friedlein

Your **brand** is what other people say about you when you're not in the room.

Jeff Bezos

Implications for Developing Brands

- Need to build emotional relationship between organisation and people
- Engage and build positive associations
- People experience your brand as they would an individual's personality
- Your brand leads people to believe your organisation will behave in a certain way

Reality Check

- If your organisation/brand was a person, how would you describe its personality? Pick five words. What evidence supports your view?

5 Reasons to develop a Brand

- Increase fundraising potential (brandraising)
- Attract board and committee members
- Attract service users
- Enhance service credibility
- Embed services in the 'collective mind' of the community

Getting Buy-in

- Why might board members or volunteers not support the development of your organisation's brand?

Brand Identity

Elements of brand identity:

- Logo type, brand mark/symbol, typography, colour
- Photography, illustrations, images
- Slogans, guidelines
- ‘Sound’ of voice

Manage Brand Elements

Elements of a brand:

- **Message:** Mission/Vision, Unique Statements, Features and Benefits
- **Practice:** quality of human interactions, product/service quality, news feed, service referrals
- **Visual:** Online, bricks & mortar, packaging, brochures, images, logo
- **Client perceptions:** what the client 'feels' towards the organisation (combination of the 3 elements)

Check brand consistency

What does the world see when they engage or view:

Staff Attitude

Corporate Identity

Customer Service

Facilities

Business Location

Website

Social Media Platforms

Public Relations

Sales Approach

Phone etiquette/voicemail

Print media/brochures

Business Cards

Product/Service Quality

Pricing & Marketing Campaigns

Get a brand return

What do you want your brand to achieve?

Key: Link your brand targets to your mission and objectives

Question: What elements of your brand are important to help you achieve your brand targets?

The Marketing Mix

- Product decisions
- Pricing strategies and sales margins
- Distribution choices
- Promotional tools
- People required and customer service

Question: *How to apply the Marketing Mix in a Social Enterprise Context?*

The Promotional Mix

Social Enterprise Communication Essentials:

- Customer Service
- Direct Selling
- PR
- Social media
- Local Advertising
- Local Partnerships
- Mailing Lists
- Marketing Campaigns
- Facility/Centre Membership Packages

Marketing and Sales Campaign Action Plans

Steps:

A marketing and sales campaign action plan should be practical, time specific and attainable!

Key elements: Campaign objectives, target results, target audience(s), key message, call to action (CTA), tools & tasks, person responsible, due date, marketing assets, budget

Marketing and Sales Campaign Action Plans

Consider:

- Who writes the plan?
- What targets to set?
- Costing and resourcing the plan
- Generating cash flow projections based on the targets set in the plan

Pitching Corporate Clients

- B2B versus B2C selling
- Structuring a direct mail to a potential corporate customer

Pitching Corporate Clients

Consider:

- What do you need the money for?
- Why can you be trusted to spend it?
- Why do you need it now?
- What's in it for the corporate client?

Exercise: *Enter the Dragon's Den!*

Measuring Progress – Monitoring and Evaluation

Key Performance Indicators

Decide in advance what indicators you will use to judge how successful your brand building, marketing and sales activities have been e.g.

- Volume of enquiries, level of awareness, web page hits, social media followers & engagement (conversation), web links to your online presence, sales recorded etc.

Measuring Progress – Monitoring and Evaluation

Key Performance Indicators

- How to set performance metrics/indicators
- Using performance metrics in financial planning and management throughout the year

Next Steps

What steps do you need to take to generate additional revenue in your social enterprise?

Whose support do you need to implement these steps?

What are the resource implications of applying these steps?

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