



Your Moray

MARKETING GUIDE



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INTRODUCTION

This handbook is an introduction to the purpose and need for marketing – it is not meant to be a definitive guide, but a resource which can be used by community groups and organisations to assist them in making the best they can with the resources they have. It should help you to construct a marketing plan which is suitable to the needs of the community you serve and utilises the resources at your disposal.

If you require more information or more in depth explanations of the various tools, there are many useful websites and reference books and some of them are detailed at the end of this guide.

WHAT IS MARKETING?

There are many definitions of marketing and most of those relate to business and talk about customers and profitability. That can be a difficult concept for community groups and organisations which are run largely by volunteers. However, your “business” whether it is managing a village hall, running a community group, or organising an event has to get the local community (your customers) involved to ensure that the village hall, community group or event will be a success.

But marketing is more than just selling and advertising.

Marketing is about identifying what the customer needs / wants and meeting those needs. It is about knowing your customer base, identifying what they want and providing it, preferably making a profit (this can also be used in terms of people, time, etc. not just money). If your customer does not want what you are providing, you will not be able to sell it and this applies whether you want to get more people involved in using your facility, participating in your activity / activities, becoming involved in the management etc. You need to get the message across in the most appropriate way so that the local community will “buy” into what is on offer.

Marketing really consists of two activities – marketing planning and marketing communications. They are related but have different focuses.

Marketing planning is making sure you are delivering the right service to your target audience – users, community groups etc. Good marketing planning helps you to understand if the service you are offering meets the needs of the people you are targeting and highlights what improvements you may need to make to your organisation or service.

Marketing communications is about getting the message across about the organisation or the service you are providing and doing that by using the most appropriate methods for your target audience.

Used together marketing planning and marketing communications will help you create effective ways of reaching and engaging with your target audience.

MAPPING

You need to do some research to ensure that you have all the information required to draw up your marketing plan and identify what marketing communications are the most appropriate for your needs. This is often called “mapping”.

Mapping means identifying what is already there, what are the gaps and what is needed?

What is already there?

The first stage in any mapping exercise is to identify what it is you already have. This could be what you have in terms of a facility / building (physical space). It could be about identifying the skills and knowledge of Management Committee members (skills audit). It could be about the programme that is offered – does it cater for the wider community or is it very narrow only catering for one age group or one gender group?

You also need to identify what is available elsewhere in the area. Are there other providers doing similar activities? What other facilities are available?

What are the gaps?

The second stage is to identify the gaps – what is missing? Perhaps the Management Committee lacks someone with financial experience or health and safety knowledge. Maybe the hall has a number of activities for older people but has nothing which caters for younger children and / or their parents.

What is needed?

The third and final stage is to find out what is needed. Is there a need / demand for a toddler group? Does the community want more social activities as

opposed to physical activities? Do people want an organised group or something a bit more casual which they can drop in and out of? Do you need more members to ensure the group's viability or to strengthen the skills available to you?

The first two stages of the mapping exercise – “what is already there?” and “what are the gaps?” could probably be completed using the people you have sitting round the table – desktop research.

The third stage – “what is needed?”, and probably the most important one, requires a bit more thought and takes time if it is going to be effective. To find out what people want you have to ask them – known as field research. There are many ways of doing this – casually when you bump into them in the aisles in the supermarket, putting up a poster and asking people to let you know what they think / want. However, these methods are not guaranteed to get results and they are very difficult to measure accurately. You really need to use a method which will give you the answers you need in a format you can easily analyse.

One tried and tested method is to use a questionnaire and / or survey, but these too, if not designed and delivered properly, can give you false impressions. So be aware – they are not foolproof and you will need to verify the results. (Hints and tips on questionnaires and surveys are in the methods section of this handbook).

PLANNING YOUR MARKETING

Marketing Action Plan

Having done the mapping exercise and identified what is needed / wanted / required, the next stage is to consider how to promote the facility / activity / group / project / or event.

With this information you can develop a Marketing Action Plan with a number of agreed objectives. This will help you to be clear about what it is you want to achieve and how best to go about it, and detail how you will know if you have been successful. In the Marketing Action Plan consider the following questions:-

- What are you promoting?
- What do you want to achieve?
- Who is your target audience?
- What are the best ways to get your message across?
- Review and evaluate.

Try to make sure that you agree “SMART” objectives – that means that they are Specific, Measurable, Attainable, Realistic and Timed (the timescale you hope to achieve the actions in).

What are you promoting?

Is it an:

- Event – a one-off event to celebrate a significant date e.g. Burns Night; a one-off fund raising event for example Christmas Fayre; a one-off public awareness event for example an open day
- Activity – weekly, daily or monthly class / club / group
- Service – photocopying, printing, training
- Recruitment – members, volunteers, participants

- Facility – coffee bar, space suitable for functions, training courses, meetings
- Group / organisation – Management Committee/ Directors, new Badminton Club, Support Group
- Community – whole village, target group, rural area.

What do you want to achieve?

It is important to know what you want to achieve from promoting your event, activity, service, facility, and organisation. By spending time on this you will be able to set out clear and realistic goals that can be measured and also be able to design the appropriate marketing methods to achieve your overall aim.

You may want to:-

- Consult, inform, engage or involve your target audience in the service you provide
- Increase the membership / volunteers to your organisation
- Increase usage of your facility
- Change attitudes, views or opinions of your organisation
- Measure the satisfaction of the service you provide in the view of making improvements.

Consult, inform, engage or involve

- Consult means that you are offering people two, three or more options and you are asking them to choose one of them
- Inform means you are only going to tell people what you plan to do
- Engage means that the community are supported to influence the options, choices and decisions of any community activity
- Involve means to encourage and support the community to be more involved in community activity.

Increase the membership/volunteers of your organisation

The key points to remember are:

- Know your organisation (good governance) – clearly know your aim, objectives, roles and responsibilities
- Understand the motivation for people to become involved
- Support your members and volunteers.

Increase usage of your facility (Ref Section 3 Mapping)

From the mapping exercise involving both desk and field research you will have acquired the following information:

- The pattern of usage, numbers and type of usage
- Knowledge of the health and safety and legal requirements of the facility
- Information gathered from your target audience on why they don't currently use your facility and what would encourage them to do so
- If the organisation supports the seeking of funding for improvements to the facility, if that is required.

Change attitudes, views or opinions of your organisation

Changing the attitudes, views or opinions of your organisation would require a lengthy commitment from all the members of your organisation and can cover many aspects of your organisation which potentially may have to change. For example:

- **Good governance** - Clearly know your aim, objectives, roles and responsibilities. Have the appropriate policies and procedures in place.
- **Customer care** - Treat everyone that contacts your organisation as a customer. Make sure the first point of contact they have with your organisation is a pleasant one and if information has to be followed for them this is done as soon as possible.

- **Communication** - Ensure that information is effectively disseminated throughout your organisation.
- **Research** - Gather information about the attitudes, views and opinions your target audience and members of your organisation have on the organisation. This will help you establish how your organisation is viewed and what needs to be changed.

Measure the satisfaction of the service you provide in the view of making improvements

Measuring the satisfaction of the service you provide is a very similar process in changing the attitudes, views or opinions of your organisation (see previous paragraph). Researching how satisfied people are with the service you provide will allow you to conclude whether you are providing the service they want and in the way in which they want it.

Who is your target audience?

You must identify who is your target audience because that will determine what kind of language you use, what information you include, if you use specific terminology, even the kind of font you use. The customer you are appealing to must be able to read and understand the information you are giving them. If you are planning an event for young children then the posters / flyers should be bright and colourful, with only essential information and using a simple style of writing such as “Arial” or “Comic Sans”.

If you want to apply for funding, then the language you use may be slightly more formal in style and use more complex information and arguments than you would use in, for example, the production of a newsletter for distribution around the local community, where the purpose is to inform and encourage participation in the various activities and events that are being planned.

What are the best ways to get your message across?

Once you have decided what you wish to achieve from your marketing you can then plan and use the most appropriate marketing tools to ensure that you achieve your aims and are successful in getting your message across.

Time after time you will hear that 'word of mouth' is the best way to inform people what is going on. But that is not always practical and different methods will have to be selected for different situations. Very often you will use multiple methods which will 'drip feed' information to ensure that you reinforce and remind your target audience of the message you wish to get across.

Review of Marketing Action Plan

It is important to review your action plan to ensure that your objectives are being / have been met. Over an agreed period of time your target audience should be consulted again to determine if there has been an increase in satisfaction levels as a result of the improvements your organisation has put in place. This could involve improvements in governance, customer care, communication, improvements in services and facilities that need additional funding and marketing.

MARKETING TOOLS

This section will help you decide which marketing methods would be useful to use in relation to Marketing Planning and / or Marketing Communications. The table below gives suggestions on which planning and communication methods would be appropriate for which purpose. The section following the table gives an explanation of the various methods.

The same marketing and planning methods can be used for a number of different purposes; however, you should chose the method that you believe is most appropriate to what it is you want to achieve, and also the one that you feel most able to implement.

Please note this list of methods is not exhaustive.

Marketing and related tools

	Marketing Planning	Marketing Communication							
What do you want to achieve?	Health Check/ SWOT Analysis	Desk and Field Research	Questionnaires / surveys	Interviews	Focus Groups	Motivation / needs matrices	Posters / Flyers	E - Engagement	Media
Consult, inform, engage, involve your target audience in the service you provide	√	√	√	√	√	√	√	√	√
Increase the membership / volunteers to your organisation	√		√			√	√	√	√
Increase usage of your facility	√	√	√				√	√	√
Change attitudes, views or opinions of your organisation	√		√	√	√	√	√	√	√
Measure the satisfaction of your service			√	√	√			√	

Health Check

A Health Check is often done by an external agency but can be carried out internally too. The Health Check examines all aspects of the organisation from constitution, aims, values, mission statement, strategic direction, staffing, volunteers, policies and procedures, through to financial arrangements. The purpose of the Health Check is to identify key areas in relation to the development of the organisation and to assist the Committee to prioritise what is required to be done to make the organisation more effective and efficient.

SWOT Analysis

A SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis helps you to focus your attention on the positives, negatives and potential pitfalls and hence opens up the discussion on how these areas of your organisation or service can be improved and safeguarded against.

Generally speaking Strengths and Weaknesses are internal factors for example finance, human resources (members, volunteers) and Opportunities and Threats are external factors for example demographics, people's habits, economics, environment, politics, legal, competitors.

Desk and Field Research

Desk Research – this is research carried out by consulting internal records, existing statistical data on a particular area or facility for example Government publications, censuses, sales/user records, accounts. The internet can also be a great source of information but make sure the information obtained in this way is accurate.

Field Research – this is research carried out to gather information for a particular objective and quite often questionnaires, surveys, focus groups and interviews are used for this purpose.

It is good practice to use a combination of these types of research to ensure you get a better understanding of your current or potential ‘customers’

Questionnaires / Surveys

Questionnaires and surveys are a very useful method in obtaining information from others. It is however very important to design your questionnaire or survey so it meets your objectives. When designing your questionnaire / survey consideration should be given to the ease of analysing the results to give you both quantitative and qualitative data.

This means that the:

- Aim of the questionnaire or survey has to be clear
- Questions are appropriate to achieve the aim of the questionnaire or survey
- There are no leading questions
- You give feedback on the results, conclusions and recommendations of the questionnaire or survey.

You must also decide how the questionnaire is to be delivered because this will need to be reflected in the way the questions are structured. If you intend to go door to door and ask people to complete the questionnaire with you, the questions will be formed very differently than if you were going to put the questionnaire through people’s doors and ask them to complete it and then hand it in or be collected at a later date.

Generally, questionnaires which are to be filled in by the responder tend to have fairly “closed” questions requiring either a yes or no answer or asking for the responder to tick boxes – “all that apply”. If you intend to deliver the

questionnaire face-to-face the questions can be a lot more open, allowing a dialogue between the responder and yourself that gives an opportunity to draw the responder out – so long as you don't lead them!

Before embarking on your questionnaire it is good practice to test it out – that way you will ensure that the questions are easily understood and unambiguous and gives you the opportunity to make any minor adjustments before embarking on the real thing.

Interviews

Interviews can be conducted with either a group or one-to-one – the most common being one-to-one. Again, as in drawing up a questionnaire, you must be very clear about what information you need to obtain and structure your questions accordingly. Make sure that you record the responses accurately. If necessary paraphrase the response but check with the interviewee that was what they were saying.

It can be quite a skill to conduct an effective interview but with practice and a few basic pointers this can be achieved.

Here are some pointers:

- Decide the objective of the interview and hence the questions you need to ask
- Determine who you need to talk to
- Plan and prepare the interview appointment. Consider the needs of the interviewee
- Explain the purpose and format of the interview
- Address terms of confidentiality
- Record session – take notes, or digitally record if interviewee is agreeable
- Be informal and conversational. Let the interviewee do most of the talking
- Actively listen

- Ask open-ended questions
- Be patient and non judgemental
- Thank the interviewee for their time and comments
- Offer feedback on the overall results.

Focus Groups

A Focus Group is a form of interview conducted with a small group of people to acquire feedback on the facility, activity etc or test out new ideas. Focus group members are encouraged to talk and discuss with other members. As a result the interview is less structured due to the interaction of group members.

Questions are posed by the interviewer and then the group will discuss and debate. There may be a consensus of opinion or not as the case may be, but the end result is that the interviewer will have a range of opinions which can be used in planning future developments.

Focus Groups are a useful and inexpensive way of getting feedback. They work better when you have a skilled interviewer conducting them, someone who can keep the focus on the task in hand, otherwise the discussion can wander off the point and the information you want gets lost in a wider discussion. Many of the pointers in the Interview section (above) apply to Focus Groups.

E-engagement

E-engagement is a fairly cheap way of getting your message across and can range from email circulation through to Facebook, Twitter and an on-line survey on your web site. There are many advantages to this type of engagement – flexibility, able to include graphics, alternative languages, anonymous, available anytime and can often result in a good response rate. Some of the disadvantages are that E-engagement is dependant on people being able to access the internet and having the confidence to use it, software and hardware varies and so may prevent people from accessing it, some people prefer face to face contact.

Posters / Flyers

Posters and flyers are a relatively cheap way to get your message across but they need to be well designed to ensure that they are eye-catching. There is no point in flooding the place with posters if people don't read them. However, you should not rely on posters alone – they should be part of a larger promotional plan which will also include media coverage.

So a good poster will:

- Not have too much information – keep it simple
- Include the name of the organisation, a contact name and telephone number so that people can find out more information and, if you are a registered charity, your charity number
- The purpose of the poster in large, bold, clear writing
- Show the information in a 'Z' pattern (Research has shown that people tend to scan posters in a zig zag fashion)
- Use a bright colour to make the purpose stand out
- A very brief explanation for example about the event
- Use colour carefully – not too many or the eye will be distracted
- Not have too many different styles of writing – two is probably enough
- Not be cluttered up with a lot of pictures or graphics.

If you can, scale the poster down to create a flyer. By doing that you will reinforce the message you want to get across.

In terms of distribution of your poster or flyers, make sure that they are put in as many places as possible including, schools, libraries, shops, post offices, doctors / health centres, community centres / village halls, pubs, village notice boards, large employers. Some community newsletters will include the poster either as part of the newsletter or as a separate page slotted into the newsletter for delivery round the local area for a small donation.

Media

The media is a very powerful medium which can be used to good advantage to get your message across. Your organisation should try to build a good relationship with local journalists as they can be invaluable in ensuring your organisation gets a high profile in the local newspapers. Use press releases to highlight important events such as a forthcoming fundraiser or success in getting funding. This can be followed up with a call to the local reporter inviting him / her to do a story, perhaps with a photo for the paper. There is always a great deal of interest in stories that involve people in the community and “good news” stories are well received.

Below are some pointers for writing a good press release:

- The headline should be attention grabbing
- Start with a brief summary of the story and try to make it interesting
- Continue with a more detailed story, highlighting important aspects
- Try to include a positive quote from someone from the community / users – how the service etc has had a positive impact on their lives
- Use clear simple language – plain English
- Should be no more than one page of A4
- Additional information can be supplied on a separate page if necessary
- Include the date for release
- Include contact details.

Marketing Action Plan Template

What are we promoting?
What do we want to achieve?
Who is our target audience?
What are the best ways of getting our message across?
Review and Evaluation

Action Plan – Detail

What do we want to achieve?	How are we going to do it?	Who will be responsible and who else will be involved?	What resources do we need?	When are we going to do it?	Review and evaluation

Group/ Organisational Health Check (9 pages)

(This document is based on the Group / Organisational Health Check produced by Community Voluntary Partners)

The purpose of the health check is to identify the specific details of the organisation as they currently exist, to highlight any gaps and therefore identify areas for development. It may be that not all sections will be relevant. Longer term developments should also be considered.

Organisation Details:

Name of Organisation	
Address of Organisation	
Postcode	
Tel No.	
Fax No.	
Email	
Website	
Name of Contact Person	
Tel No.	
Email	

Date Health Check Completed	
Name of Person completing	
Signature	

Section 1	Organisational Status	
What type of an organisation are you?		
Unincorporated		
Charitable Trust		
Company Limited by Guarantee		
Industrial & Provident Society		
What sort of governing documents do you have?(Please detail dates)		
	Date Drafted	Last Reviewed
Constitution		
Trust of Deed		
Declaration of Trust		
Memorandum and Articles of Association		
Rules		
Are you registered with any of the following?		
Charity Commission		
Registrar of Companies		
Inland Revenue		
Register of Friendly Societies		
Other (please state)		

Section 2	Policies and Procedures	
Does your organisation/ group have policies or procedures for any of the following? (please detail dates)		
	Date Drafted	Last Reviewed
Equalities		
Anti-discriminatory Practice		
Child Protection		
Data Protection		
Health and Safety		
Disciplinary		
Grievance		
Complaints		
Staff Recruitment		
Volunteers		
Environmental		
Other (please state)		
Detail who (e.g. committee members, advisors, staff etc.)was involved in		
Drafting the polices		
Reviewing the policies		

Are copies of these policies easily accessible to:		
Committee/ Board		
Staff		
Users/ members		
Volunteers		
Section 3	Strategic Direction	
What are your organisations aims and objectives?		
Does your organisation/ group have any of the following?		
	Date Drafted	Last Reviewed
Values Statement		
Mission Statement		
Strategic Plan		
Business Plan		
Marketing Plan		
Fundraising Strategy		

If you have any of the above, who was involved in writing them? (e.g. Committee, staff, volunteers, others)

Values Statement	
Mission Statement	
Strategic Plan	
Business Plan	
Marketing Plan	
Fundraising Strategy	

Section 4		People Resources	
Management Committee/ Board			
How many members does your committee have?			
Do members of your committee receive regular training?			Y / N
How many times per year does your committee meet?			
How many are male?		female?	
What is the ethnic make-up of your committee? (insert numbers)			
African		African-Caribbean	
Asian		Black UK	
Chinese		Irish	
Latin American		Middle Eastern	
Mixed heritage		White UK	
European (please state)		Other (please state)	
How many committee members have a disability?			
Staff			
How many members of staff does your organisation/ group employ?			
Are staff paid on a nationally recognised pay scale e.g. NJC?			Y / N
How many are male?		female?	
What is the ethnic make-up of your staff? (Please detail using list above and insert numbers).			
How many have a disability?			

Volunteers			
How many volunteers does your organisation use?			
Do volunteers receive regular training?			Y / N
Are volunteers paid out-of pocket expenses?			Y / N
How many are male?		female?	
What is the ethnic make-up of your volunteers? (insert numbers)			
African		African-Caribbean	
Asian		Black UK	
Chinese		Irish	
Latin American		Middle Eastern	
Mixed heritage		White UK	
European (please state)		Other (please state)	
How many volunteers have a disability?			
Does your organisation have job descriptions for..?			
Staff			Y / N
Committee			Y / N
Volunteers			Y / N
Does your organisation have a training budget for..?			
Staff			Y / N
Committee			Y / N
Volunteers			Y / N
How much is that budget?			

Section 5	Funding		
What was your total income for the last financial year?			
What was your total expenditure for the last financial year?			
What is your income to date?			
What is your expenditure to date?			
Where does your funding come from?(please detail the amounts)			
Specific funders			
Local grants			
Trusts			
Companies			
Income e.g. hall rental			
Fundraising events			
Legacies/ donations			
Contracts			
Others (please detail)			
Who does your fundraising?			
Committee		Volunteers	
Staff		Consultant	

Section 6	Publicity and Marketing (publicising and promoting your services and the work of your organisation)	
How do you publicise and promote your work?	How often?	
Posters		
Leaflets/ flyers		
Articles in the press		
Produce own newsletter		
Annual Report		
Public meetings		
Giving talks		
Through conferences/ workshops/ events		
Other (please state)		
Where do you distribute your publicity material? (please list)		
Who is responsible for publicity and marketing?		

Section 7	Monitoring and Evaluation
Does the organisation have specific targets you aim to meet?	
	Y / N
Are these detailed in an Action Plan using SMART objectives?	
	Y / N
How do you monitor the work of the organisation? (please detail in the box below)	
Do you consult with members/ users?	
	Y / N
If yes, please detail below what you consult them on, what methods you use, and how often you do this.	
Is the outcome of the consultation reported back to members/ users?	
	Y / N
If yes, how do you do this?	
Do you consult any others? E.g. Community, agencies etc	
	Y / N
If yes, please detail below what you consult them on, what methods you use, and how often you do this.	
Is the outcome of the consultation reported back to others	
	Y / N
If yes, how do you do this?	

SWOT Analysis Template

Situation being analysed:

This SWOT example is for a new business opportunity. Many criteria can apply to more than one quadrant. Identify criteria appropriate to your own SWOT situation.

<p>criteria examples</p> <p>Advantages of proposition? Capabilities? Competitive advantages? USP's (unique selling points)? Resources, Assets, People? Experience, knowledge, data? Financial reserves, likely returns? Marketing - reach, distribution, awareness? Innovative aspects? Location and geographical? Price, value, quality? Accreditations, qualifications, certifications? Processes, systems, IT, communications? Cultural, attitudinal, behavioural? Management cover, succession? Philosophy and values?</p>	<p>strengths</p>	<p>weaknesses</p>	<p>criteria examples</p> <p>Disadvantages of proposition? Gaps in capabilities? Lack of competitive strength? Reputation, presence and reach? Financials? Own known vulnerabilities? Timescales, deadlines and pressures? Cashflow, start-up cash-drain? Continuity, supply chain robustness? Effects on core activities, distraction? Reliability of data, plan predictability? Morale, commitment, leadership? Accreditations, etc? Processes and systems, etc? Management cover, succession?</p>
<p>criteria examples</p> <p>Market developments? Competitors' vulnerabilities? Industry or lifestyle trends? Technology development and innovation? Global influences? New markets, vertical, horizontal? Niche target markets? Geographical, export, import? New USP's? Tactics: eg, surprise, major contracts? Business and product development? Information and research? Partnerships, agencies, distribution? Volumes, production, economies? Seasonal, weather, fashion influences?</p>	<p>opportunities</p>	<p>threats</p>	<p>criteria examples</p> <p>Political effects? Legislative effects? Environmental effects? IT developments? Competitor intentions - various? Market demand? New technologies, services, ideas? Vital contracts and partners? Sustaining internal capabilities? Obstacles faced? Insurmountable weaknesses? Loss of key staff? Sustainable financial backing? Economy - home, abroad? Seasonality, weather effects?</p>

© Alan Chapman 2005-08. Free PDF version of this tool and information about SWOT analysis methods are available at www.businessballs.com/swotanalysisfreetemplate.htm. This is a free resource from www.businessballs.com, which contains lots more useful tools, diagrams and materials. Not to be sold or published.

Useful References

Business Balls

www.businessballs.com

Skye and Lochalsh Community Toolkit

www.slcvo.org.uk

First Port – Booklet on Marketing

www.firstport.org.uk/files/Understanding%20Customers.pdf

Business Gateway – although aimed at businesses has many useful items

www.bgateway.com

Market Research Society – Booklet on Market and Social research for Newcomers

<http://www.mrs.org.uk/mrindustry/index.htm>

**Marketing Guide produced by the
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Chief Executive's Department,
The Moray Council**

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