Using Marketing Research to Optimize Your Agency’s Success

Presentation to:

January 26, 2021
Agenda

• Who is The Melior Group?
• What is Marketing Research?
• Why use Marketing Research?
  • Market Opportunity Evaluation
  • Community Priorities
  • Donor Engagement
  • Brand Perception
  • Community Assessment
About The Melior Group

• Based in Philadelphia, national client-base
• Specialize in four specific service sectors: Nonprofits, education, healthcare and financial services
• Assisting client organization to optimize decision making
• Traditional and new methodologies
Value of Marketing Research

“Without data you’re just another person with an opinion.”

W. Edwards Deming
What is Marketing Research?

• Marketing Research is the systematic collection, analysis, and interpretation of data, information and intelligence pertaining to all aspect of an organization’s marketing – “the 4 P’s”

• Methodologies: “Let’s focus group it”…or not
  • Qualitative Research - open end opinions, thoughts; requires probing for “getting underneath” comments
    • In person: In-depth interviews, focus groups
    • Online: Focus groups, bulletin boards, in-depth interviews
  • Quantitative research - to measure prevalence, trends, preferences, metrics and tracking
    • Online surveys (web-based, mobile compatible)
    • Phone surveys (moving toward cell phones)
• Often combine qual and quant to develop a full picture
Why use Marketing Research?

• Inform organizational decisions that impact investment, have human and financial cost implications and contribute to new directions.
  • Make go/no go business decisions
  • Inform new product new product/service/program design
  • Understand the impact of events (e.g., COVID) on market needs, perceptions of products/services
  • Determining the brand promise and market position
  • Selecting creative
Examples of Marketing Research Success
## Market Opportunity Evaluation

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<tr>
<th>Challenge</th>
<th>Process</th>
<th>Outcome</th>
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| • The Jewish Federation and the Jewish Foundation of Cincinnati were considering expanding the current offerings by investing in additional capacity. | **Qualitative Research**  
  • School administrators  
  • Teachers  
  • Parents  
  **Quantitative Research**  
  • Parents of young children  
  • Expectant parents  
  • Parents to be parents | **More capacity desired**  
  • Infant care  
  **Communication**  
  • Program capacity  
  • Waiting List Mechanics  
  • New/expanded program |
Community Priorities

Challenge
• Jewish Federation of Delaware was looking for input into strategic plan. Specifically, to learn the
  • Community perspective on Federation’s role
  • Community’s funding priorities

Process
• Qualitative Research
  • Stakeholders
  • Community members
• Quantitative Research
  • Community members

Outcome
• Funding Priorities
  • Allocations
  • New messaging and communications
• Working together
  • Galvanized the community to work toward bright future of Jewish Delaware
# Donor Engagement

## Challenge
- Greater Philadelphia Cultural Alliance’s goal involved helping its member organizations better understand high net worth individuals
  - How they make philanthropic decisions
  - How to increase support

## Process
- **Secondary Research**
  - National trends
- **Quantitative Research**
  - Donors of member organizations
- **Qualitative Research**
  - High net-worth individuals
  - Wealth advisors

## Outcome
- **Developed profiles**
  - Behaviors, values and priorities
  - Passion vs. Priority
- **Strategic Guidance**
  - How to best create new relationships
  - How to enhance existing relationships
## Challenge
- YMCA of Greater Brandywine wanted to learn how it is perceived in the community
  - Recognition of initiatives
  - Role in community
  - Donor/member role

## Process
- Qualitative Research
  - Y members who do and do not donate
  - Local business owners
- Quantitative Research
  - Y members
  - Y users
  - Community members

## Outcome
- Knowledge
  - What residents understand about YMCA
  - How to educate on impact YMCA has on community
- Drivers to belonging
  - Differentiate
- Mission impact
  - Engage donors
### Community Assessment

**Challenge**
- Jewish Federation of Northern New Jersey wanted to improve the planning process by learning about its community members
  - Characteristics, needs and attitudes
  - Philanthropic mindset

**Process**
- Qualitative Research
  - Stakeholders
  - Donors to JFNNJ
  - Philanthropists
- Quantitative Research
  - Jewish Community members

**Outcome**
- Strengthened marketing and outreach
  - Raised brand awareness
  - Built brand image
- Program planning
  - Direction
- Donor Engagement
  - Financial investment
Wrap Up
Q & A