

# Using Marketing Research to Optimize Your Agency's Success

Presentation to:



**NETWORK**  
of Jewish Human  
Service Agencies



THE  
MELIOR  
GROUP

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# 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



## Challenge

- The Jewish Federation and the Jewish Foundation of Cincinnati were considering expanding the current offerings by investing in additional capacity.

## Process

- **Qualitative Research**
  - School administrators
  - Teachers
  - Parents
- **Quantitative Research**
  - Parents of young children
  - Expectant parents
  - Parents to be parents

## Outcome

- **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' 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

# Brand Perception



## 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



# JEWISH TIDEWATER

*Lend your voice...help write our story.*



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# Q & A



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Information. Intelligence. Insights.