NATIONAL DISABILITY SERVICES

MARKETING GOVERNANCE

MODULE 7

ACCOUNTABILITY AND METRICS

PRESENTED BY ALEX MAKIN

PRINCIPAL FOUNDER OF SYNEKA MARKETING

# Slide 1 – Introduction

Hello, and thank you for viewing our series on marketing governance. This is the final module exploring the five pillars of marketing governance, and we'll be delving into accountability and metrics and how we assess marketing performance.

My name is Alex Makin, and I'm delivering this content in conjunction with National Disability Services. This series has been designed to support you as a disability provider in transitioning and maintaining your presence in the market in the transition to the National Disability Insurance Scheme. In this component we're going to be exploring how you measure marketing outcomes, and how you can measure marketing performance so you can make informed marketing decisions.

The NDIS is effectively a model of becoming market-facing and providing products and services that align with demand and the expectations and the outcomes sought by participants and their stakeholders. You need to be able to measure marketing performance so that you can assess how best to utilise your resources to deliver an outcome.

This is the fifth series in our marketing governance webinar component, and is the final component of our series on marketing governance. The other four modules looked at strategy, risk, finance, roles and responsibilities, and now we're closing through looking at accountability and metrics. For those of you that may need a refresher on key marketing terms and concepts, there are two modules that explore key marketing concepts, and it's well worth viewing those as they embed key marketing concepts, marketing concepts that we then apply through the marketing governance framework.

Thank you for your participation across the series, and look forward to as we explore how we measure marketing performance, and how you can assess your return from marketing activities.

# Slide 2 - Learning Objectives

We have three core learning objectives that we wish to achieve through this content. The first is the ability to identify suitable marketing metrics. If we don't actually identify what metrics are relevant, it becomes very difficult to actually assess marketing performance. It's about assessing and measuring the right metrics that enable you to correlate those marketing activities to outcomes and to organisational impact.

We're going to be exploring the systems that are required to capture data. Ultimately you need the systems in place so you can capture and analyse that data. It's marketing's role to draw insights from that data. You need the systems in place and the processes in place to ensure that the right data is being captured so you can make an informed marketing decision.

W're going to realise the role of metrics in maintaining accountability. Good governance is fundamentally about having the right information to make an informed decision. Metrics, measuring performance, embeds the ability to maintain and strengthen accountability. That's particularly important in a function like marketing where it needs to coalesce your internal capability and capacity to the needs of the external marketplace. You need to be able to measure marketing performance so you can assess what your anticipated results are and where there's variations, and how you measure performance across the chain of activities and the decision-making processes that your participants and stakeholders will be undertaking.

Accountability and metrics really underpins the fundamentals of marketing governance. If you don't have metrics in place, it makes it difficult to determine whether you're achieving your strategic direction. If you don't have metrics in place, it makes it difficult to assess, manage and control risk. If you don't have metrics in place, it makes it difficult to allocate financial resources. If you don't have the metrics in place, it makes it difficult to assess the delivery of personnel, and it makes it difficult to even define what they should be accountable for.

And of course, when you look at reporting frameworks, as an organisation you need to report on core marketing metrics, and fundamentally under an NDIS, a market-driven model, it's about:

* Have we acquired clients?
* Have we retained those clients and participants?
* Fundamentally the core need that you need to fulfil from a marketing perspective.
* Has marketing helped us in acquiring new participants, and in retaining, as much as possible, the participants that we have?

Then there's other metrics that help support the achievement of those two core goals. You need the frameworks in place to report that through to your Boards, into the Executive team, Management and Operations.

# Slide 3 - Marketing Is Accountable

There's a common perception that marketing is immeasurable, and as a result it's unaccountable. The reality could not be further from the truth. The reality is that marketing and the metrics around it have existed since the introduction of the discipline. Ultimately it's about being able to identify the return from your marketing spend, and evaluate the results from your marketing activities.

There's also a common perception that online tools, online platforms, are more measurable than offline. Once again, this is a misnomer. You can actually measure offline activities if you define the metrics around it. The difference is that often in the online environment, those metrics are defined for you.

* While there may be metrics, are they actually metrics that matter to your organisation?

You can measure offline activities - advertising, brochures, circulation of direct mail, any other activities that you may be undertaking offline - as much as you can online activity.

It's not only about measuring the activities and outputs around those activities, but also the outcomes that they contribute to.

If you're distributing a brochure in letterboxes, does it help drive new involvement in your organisation?

* If you're running an AdWords campaign, and yes it may attract hits to your website, but do those hits translate into enquiries which then should translate into new participants?

Understand what it is that actually needs to be measured, and how the chain of activities and those metrics build to the outcome and the impact that that outcome has on your organisation, because fundamentally marketing metrics are required to assess the performance of marketing. If we don't have the metrics in place, it makes it very difficult to actually analyse and determine the outcomes and the value that marketing is achieving.

We need to remember that the core definition of marketing is about the mutual exchange of value. Marketing needs to demonstrate the value it's providing your organisation so you can optimise those marketing activities and that you can allocate resources appropriately and get a return that is in excess and above the costs that are put into those activities. That's ultimately how we need to measure one of our indicators of success.

* Are we generating a return above and beyond the costs that were required to undertake those activities?

What we'll be delving into is how we measure those chain of activities, and some of the metrics that are relevant to you as an organisation as you explore your positioning within the NDIS and a market that becomes demand-driven.

# Slide 4 - The Marketing Mix

Once again, the core concept is the marketing mix. Marketing needs to involve your entire organisation. This is something we explored in detail in the roles and responsibility module. It's the marketing mix that forms the basis of your customer or stakeholder experience, and often you may hear the marketing mix be referred to as a customer experience or stakeholder experience. What they should be referring to when they're discussing that customer experience is the elements of the marketing mix.

* How do those elements work cohesively to provide a consistent articulation of value?

The marketing mix is customer experience, and it is the stakeholder experience. If you're hearing the term "stakeholder" or "customer experience" without a correlation back to the marketing mix, you need to question what it is and what experiences they're attempting to create. Customer or stakeholder experience is the current buzz trend in marketing and allied industries around communications and digital, but if it isn't embedded in the marketing concept of the marketing mix, what experience is it actually creating? Fundamentally this is why marketing needs to work within and across your organisation.

* How do you ensure consistency and cohesiveness across and within each of those elements of the marketing mix?

One of the core fundamentals around marketing is consistency.

* How do you align each of those elements and provide a consistent approach to the market, where you can articulate the value that you clearly provide?

# Slide 5 - Use the Right Metrics

It's very important when we assess marketing performance that we use the right metrics.

* How can you evaluate the effectiveness on a social media campaign on the likes or the follows alone?
* What outcome do those followers, do those likes, create?
* Does it lead to a measurable increase in brand awareness?
* Does it lead to a measurable increase in purchase or acquisition intent?

They're the metrics that actually matter, because based on those metrics correlates to the ability to acquire new participants and to retain participants.

You need to actually identify the chain of activities that are required. Often there'll be a series of activities that build to the outcome that you're wishing to create. Social media may be part of your platform in raising awareness.

* If so, how do you measure that increase in awareness?
* How do you measure from that increase in awareness a propensity or likelihood that someone is going to commit to the products and services that you provide and become a participant of the products and services that you provide as an organisation?
* How then does that awareness help reinforce the experience that you're wishing to create?
* How does that in turn help strengthen the retainment and retention of that participant?

You need to be able to measure the complete activity chain, starting with that initial input, building it through those outputs, and into the outcomes that it creates.

Marketing needs the ability to be able to track each of those metrics. It's imperative that you have the systems, the data in place to measure the chain of activities, because that's how you drive marketing performance. It's about having those systems, processes, that support data collection so that marketing can make those informed decisions, and you're able to track performance across each of those activities.

That applies equally in the offline space as well.

* If you're running an event, how do you build awareness around that event?
* What are the outcomes of that event?
* If that event is a fundraiser, what are the goals around raising funds?
* How do you build awareness around this fundraiser?
* What channels do you use to market?
* Who are the desired participants for that fundraising event?
* How many participants do you anticipate undertaking that event?
* What level of enquiries is made in interest around that event?
* What donations are being contributed per participant, and the networks around each of those participants?
* How do they build into achieving the targets that you've set?

There's a number of activities that build that chain, and build up to that outcome where it delivers a tangible result. It's imperative that you measure each of those aspects so you can make informed decisions around how you allocate marketing resources, and the expected return that you should be anticipating, and how you can put in place actions to mitigate risk and uncertainty if there's variations.

We begin measuring marketing activities by looking at the inputs, the resources that contribute to an output. An input provides initial activities. They don't necessarily achieve any tangible result on their own, but they provide those initial metrics, and marketing needs the ability to track each of those metrics. So your inputs are you social media followers, you website visitors, the distribution of brochures, the distribution of flyers, the number of participants at an event, the issuing of media releases. They're all examples of inputs that will lead to an output and corresponding outcomes.

Those inputs are those initial activities. Something has been created, but it doesn't necessarily achieve anything in its own right. The number of times you've issued a media release, if those media releases aren't covered, doesn't necessarily achieve anything. But the issuing of that media release allows you an opportunity for further engagement. It's around building the models so you can focus on the metrics that actually matter, and measure and identify where those opportunities are and what you should be leveraging from a marketing perspective.

So your inputs are your initial activities. They won't necessarily create any outcomes in their own right, but it's the initial activity that helps provide further contribution to outputs. Once again, you need the ability to track each of those elements and identify what those reporting frameworks look like.

* Who needs to maintain oversight of that reporting function?

Often that's your managerial layer that sits above the execution elements so they can start coalescing those outputs and combining them into tangible outcomes.

Our outputs are the result of interaction with those inputs. Your outputs are your desired result. Typically this will tend to involve a level of engagement. So your social media followers, your output is the level of interaction with the content that you're publishing on social media. The output on your website is the call to action.

* Has an enquiry been lodged?
* Has an email been sent?
* Has there been a level of interaction beyond just visiting your website?

The output around advertising is:

* Has there been a prompt to that call to action?

So if you have an advertisement that's advertising the services that you provide, the output is the lodgement of that enquiry. Your input, in that case, is your circulation and reach. Your output is that ability to correlate those that have responded to the call to action. So an output would typically involve a level of engagement, and it may involve a number of inputs that build to those desired outputs.

It provides a step along the decision-making process, so often those outputs will correlate to the decision-making process, the journey that's been undertaken by your stakeholders, by your participants, in choosing the providers that they wish to work with and exploring the alternatives that may exist. Your outputs will generally correlate with a step along that decision-making process.

Once again, marketing needs the ability to track each of these metrics. It needs the ability to track these outputs and identify the inputs that build to those outputs, the outputs being something that involves typically a level of engagement and is reinforced through a step along the decision-making process. If that enquiry has been lodged, it demonstrates an interest in your products and services. It doesn't necessarily mean that you've acquired a participant at that stage, but you've been able to identify that there's a level of interest.

Outputs around brand awareness:

* What does that correlate, then, in terms of the value of your brand and the organisation, the values, that your stakeholders place on your organisation, and what they see as your respective strengths and core attributes?

Your outputs are a step along that decision-making process.

And there are outcomes. That tends to be the result of the chain of activities. So there's a series of activities that will contribute to that outcome, and that outcome will be aligned with the strategies in your strategic marketing plan. An outcome will often be the combination of several inputs and their corresponding outputs, but outcomes should have a tangible impact on the marketing strategies and your organisational goals. It's imperative that those outcomes have a direct correlation to the strategies in your strategic marketing plan, which in turn should be directly impacting on your organisational vision and direction.

Unfortunately there's many cases in marketing where inputs can be confused for outcomes. The important consideration here is to remember that your outcomes need to deliver a tangible impact. You should be able to draw a direct correlation between those outcomes and the impact that that will have.If you have a strategic marketing plan that focuses on acquisition, your outcomes should then in turn have a direct correlation on growth of market share, on profitability, on revenue. Those outcomes in acquisition should demonstrate an impact on those core metrics and ultimately the ability to demonstrate that you're experiencing growth as an organisation. An outcome needs to have that direct correlation. That outcome in turn will have the combination of outputs and inputs that contribute to the ability to demonstrate that outcome.

# Slide 6 - Marketing Metrics

Now we can turn to your workbooks and explore the metrics that you currently use in your organisation.

* How are you currently measuring the result of your marketing activities?
* What metrics are in place?
* Who are you reporting those metrics to?
* What decisions are being made based around those metrics?
* What metrics do you currently use in your organisation?
* What gaps exist?
* Are you actually measuring and distinguishing between inputs, outputs and outcomes?
* What gaps exist in measuring marketing performance?
* Is one of the gaps the fact that you're not distinguishing between inputs, outputs and outcomes?
* Where are the gaps in measurement?
* Are there areas where you're measuring outcomes more effectively than others?
* How do you then rectify some of those gaps?

Being able to identify where those gaps are and how you can potentially rectify them enables you to work through how to strengthen the measurement of marketing outcomes.

The reality is, the introduction of the NDIS is a fundamental change in the model and provision of disability services. Fundamentally it's about how you as an organisation become market-facing, how you can leverage marketing to achieve organisational outcomes and the impact in terms of acquisition and retention. So you need to embed rigorous marketing performance frameworks so you can assess that performance. Undertaking marketing activities and not knowing what results you're creating defeats the purpose.

This is a bit of a paradigm shift, and it is about building the capabilities and core aspects of metrics that you need to make those informed decisions. For many not-for-profit organisations this can be a new area. It's around firstly identifying:

* What metrics do you currently have in place?
* Are you reporting to your Board, to your Executive team, in some of those metrics?
* From there, are there activities that you're undertaking where you're not measuring it effectively?
* If so, how could you potentially rectify that?
* What metrics do you need to start measuring?

# How do you capture that data?

* How do you ensure that decisions are being made based on that data that is available?

Once you start collating and collecting that data, you then need to make decisions based on that data and the information that you can derive from that data.

* How does it help you make better-informed marketing decisions, and ultimately marketing decisions that optimise the allocation of the resources that you've allocated to marketing?

It isn't necessarily a case of spending more on marketing. It's about allocating those resources more efficiently and more effectively, optimising the marketing that you're undertaking. The way to do that is through measuring marketing performance.

Take a moment to work through those marketing metrics. Step through the interface with your marketing mix and the stakeholder experience. Walk through the decision-making processes and consider what you currently measure in your organisation.

# Slide 7 - Measure Return on Marketing

Ultimately, what we're aiming to do is measure your return on marketing performance, and measure your return on the investment that you place in marketing. You need to be able to identify the purpose of each marketing activity.

* Why are you undertaking those activities?
* Where do they fit in terms of the decision-making process, or the stakeholder journey, the participant journey, that your target markets are undertaking?
* What inputs are required across each of those activities and throughout that decision-making process?
* What outputs do those incomes [sic] provide?
* How does that contribute to your design outcomes?

Ultimately there's going to be multiple steps and multiple metrics, because that journey isn't necessarily linear. There'll be a few different permutations, but there won't necessarily be a linear journey. It's around understanding:

* What permutations exist?
* What happens if someone hears about our organisation from someone that they know versus reading about you in a newspaper or viewing you online?
* How do those three potential inputs lead to differing outcomes in terms of potential conversion, and hence potential acquisition?
* How do you map that across the decision-making process at the stakeholder journeys?
* How do you optimise referrals and word-of-mouth recommendations so that people are providing a consistent viewpoint in how they discuss your organisation and the value that it delivers?

All examples of where you can embed marketing metrics.

It's not uncommon for the average not-for-profit to discuss the value of its referral networks, people that they know who are referring others into the services or recommending it to other members of the community that they know. One of the core challenges, then, is:

* How do you guide those conversations, and the core messages that you'd like to be portrayed when someone is providing those recommendations?

That allows you to start to optimise those referrals and recommendations so that you're able to provide a consistent message and consistent experience.

Once we start measuring these marketing activities, we can establish a consistent benchmark, and we can start tracking performance over time. So if you introduce new products or services, or you're looking at new market opportunities and reaching new markets with your existing products and services, you can benchmark those results based off your current results, and you can measure performance over time and identify how best to optimise your marketing activities.

# Slide 8 - The Decision Sequence

We've explored the decision-making process, the decision sequence, at various points through this series on marketing governance. This is otherwise known as the customer or stakeholder journey. Once again, it tends to be a key buzz element in the world of marketing, and particularly through agencies, digital, communication agencies, that often talk about the customer journey. But once again, if it isn't embedded in core marketing theory and isn't embedded in the decision-making processes that correlate to your stakeholders, how they're making decisions, the reference points they're using in making those decisions, and walking through and working through those layers of decision-making processes and through that sequence of pre-purchase, purchase and post-purchase, it won't necessarily be grounded in outcomes that are going to be delivering core marketing results.

From a metrics and accountability perspective, we're exploring what inputs, what activities we need, across each phase of that journey.

* So as we have prospective participants that are becoming aware of providers, how do you foster that awareness?
* As they recognise that there's a need that they need to fulfil, how do you demonstrate that you help fulfil that need?
* As they search for those providers, as they look for information about what providers are out there that may fulfil that need, how do you make sure that you're part of that set that they evoke around being a potential provider that can resolve their needs?
* How do you demonstrate and enable them to investigate how your outcomes match with the outcomes required through the NDIS plan and contribute to the outcomes-focused approach of the NDIS?
* What level of commitment do you require?
* What purchase decision is needed?
* How easy is it to make a purchase decision?
* How are your products and services delivered?
* Is it through support workers and front-line staff? Is it physical products that are distributed? Do they pick that up, or is it actually delivered to them?
* How is that delivery process and the delivery of that product or service relative to making that transaction?

They can be two separate phases. In the online space, one of the key considerations to be mindful of is how many steps does it require to check out and make a transaction? If there's too many steps, you may find that people that are purchasing a product, purchasing a service online, may not necessarily commit to the decision if there's too many steps required to make that purchase and it becomes too much effort. But likewise if there's physical locations, if there's a number of steps required to make a commitment, how does that diminish someone's willingness to carry through and commit to your service?

And then that post-purchase phase: the usage of your product or service and evaluating.

* Did it meet my needs?
* Do I believe that other providers may fulfil those needs better?
* Have you actually delivered the outcomes and the value that I was expecting?
* What impressions remain in that post-purchase phase?
* What impressions remain once they've utilised your products and services?

This equally applies to stakeholders. That purchase phase may be an engagement phase around:

* How do we engage medical and health professionals, education professionals, around the services that we provide?
* How do we continually provide points of engagement to make sure that they're aware of those services and how it will meet the needs of their participants in turn?

You'll notice that there's a number of arrows throughout this process. Ultimately it's because this repeat engagement creates an ongoing loop, that there's a number of steps along the way and once they go through the pre-purchase, purchase and post-purchase phase, they may make the choice of purchasing your product or service again, or they may explore what other options exist in the marketplace and go back to the pre-purchase phase. There's a number of steps, and this operates as a loop, because ultimately what you need to be able to do through the NDIS is acquire and retain participants. Similarly, you need to be able to acquire some core stakeholders, core networks and channels to market, who are the partners that you utilise and work with and collaborate with to reach potential participants and their families and carers and others that may be influencing decisions, and how do you keep them engaged through each step of the process? What we need to be able to do is define the marketing metrics along each step of that stakeholder or customer journey, and the decisions that they make in coming to purchase decisions.

Always remember that one of the alternatives is not to make a decision. If they choose not to make a decision, then while they haven't necessarily gone to a competitor, they're not necessarily purchasing your products or services either. Doing nothing can be an option as well, and it's something that you need to be mindful of when you consider competitive pressures and the competitive landscape.

* How easy is it just to not make a decision, and therefore not engage in any of those products or services, whether yours or whether your competitors?

# Slide 9 - Marketing Metrics

Now we're exploring the role of marketing metrics and the activities required across each stage of the decision-making process. In your workbooks you'll notice a diagram exploring each of those three phases. What you want to be able to do is demonstrate the metrics required and the metrics that you're using across each of those phases.

* What metrics are being used within the decision-making sequence?
* How are you measuring awareness, that identification of needs, the search for information to fulfil those needs, and investigating who's best placed to meet the needs that that participant or those stakeholders may have?
* What metrics do you use around the purchase process?
* And post-purchase, how do you measure loyalty, ongoing engagement and ongoing participation?

You need to be able to articulate those metrics across each step of the decision-making process, because this is ultimately why you're undertaking those marketing activities. It's about transitioning your participants, your broader stakeholders, through each step of that journey and showing that from a marketing perspective that that builds into an element and an outcome that has an impact on acquisition and retention.

* What metrics are you currently using, and what activities are you undertaking, within each phase of that decision-making process?
* Once again, are those metrics developed so that you're exploring inputs, their corresponding outputs, and the potential outcomes that are created?

You need to be able to document those activities and the metrics of those activities throughout that decision-making process.

# Slide 10 - Mapping the Roles

We've also explored, through the marketing governance framework and our five pillars of good marketing governance, the roles that are involved in each of your stakeholders, remembering that there may be a number of people that fulfil each role, or there might be people that fulfil multiple roles.

Ultimately it's about mapping:

* Who is interacting along each step of that decision-making process?
* Who's influencing that decision?
* What information are they seeking to help influence decisions?
* Who's making the ultimate decision?

Under the NDIS, while the participant is using the packages provided to the participant, so they're the buyer and end user, the decider could be family or carers or others who are making decisions on their behalf. Families and carers can be influencing those decisions as well, as could health, education, NDIS coordinators, other providers, that are influencing decisions.

* Are there gatekeepers that are filtering information?

This may not necessarily be a deliberate act of restricting information, but it's are there gatekeepers that are applying their own perspectives on the information that is provided? So if you're working with intermediaries and channels to market, working with health or education professionals and developing partnerships around identifying the needs for your services:

* How are they filtering that information?
* What information are they conveying to their respective participants?
* How does that then shape the discussion and viewpoints and perceived experience that will be created through your products and services?

And the initiator:

* Who is it that's initiating that decision?

It may not necessarily always be the participant themselves. It could be the NDIS coordinators. It could be other professionals that are supporting that participant. It could be family, friends, carers, other stakeholders that are actually helping to identify and initiate that need.

Once again, you need to be able to understand:

* Who's involved in those decisions?
* What activities are required to help provide them with confidence and value around what outcomes you are providing?

Once again, it's about understanding what are the needs of each of those roles and the people within those roles, and what value are they seeking, and aligning the services, products, your messaging, the elements of the marketing mix, through a permutation that looks at the value that each of those relevant stakeholders and those roles are providing, while being consistent to the experience that you're providing to your participants.

# Slide 11 - Hierarchy of Metrics

As we delve into marketing metrics, we need to be mindful that there's actually a hierarchy of metrics. Your strategic marketing plan should determine the key headline metrics, the key outcomes that correlate to business or organisational impact. So a strategic plan may look at market share and growth opportunities. It needs to look at the metrics around revenue growth and what impact that has on profitability.

A marketing plan should identify the rate of marketing return and your impact in terms of acquisition and retention.

* How many new participants are you acquiring?
* How many are you retaining?

Key metrics that have accountable impact on your organisation: your organisation's sustainability and viability,  its opportunities for growth, its opportunities to maintain and sustain and strengthen its position in the market.

Often these metrics are interconnected. There's a hierarchy of metrics because those metrics will often contribute to some of those key metrics that you articulate in your strategic marketing plan. But the metrics within your strategic marketing plan and those core marketing strategies should have an impact on your organisation. They need to be outcomes that, once again, have a tangible impact that you can demonstrate, correlate and improves your mission, your vision, your ability to position your organisation.

Those hierarchy of metrics enable you to identify what metrics contribute to that overarching impact, and what that impact means from a context of your organisation. Once again, we're exploring that strategic alignment between your marketing plan, your organisational plan, and how marketing helps deliver on the outcomes, and how it delivers those outcomes, that you've articulated in your business or organisational plan.

# Slide 12 - Market Share

One of the initial metrics we're exploring is market share. Ultimately, market share looks at our presence in the market, defined by the market that we're reaching, who our target market is. So if we need to articulate market share, look at:

* What is the total market size?
* What is the total number of NDIS-eligible participants?
* What is the total market size of NDIS-eligible participants that utilise products and services that we provide?
* What is our percentage of that market?
* Have we established growth targets?
* When we discuss participant acquisition, have we established targets around what we'd like to see in terms of level of growth?
* What is our existing customer base?
* What is our current market share?
* How much of that market is already engaged with us?
* What opportunities are there for growth?
* Are there limited opportunities and we may need to explore other alternatives?
* Are there other markets that we should examine as well?

These are some of the insights that you can derive out of an understanding of market share.

* What is the level of repeat purchase within that market share?

Ultimately that market share needs to drive repeat purchasing and repeat participation, so it's not just about acquisition, but how do you retain that and maintain your market share, because if other providers are entering the services that you provide, they'll be seeking to increase their market share, and that'll often be at the consequence of existing providers.

* What impact will that have on your share of the market?
* How do you safeguard that?
* How do you look at growth?
* How do you maintain, sustain and strengthen your presence in the market?

Market share enables you to explore what proportion of participants do you have based on the total number of participants within the segments that you're reaching.

# Slide 13 - Marketing Metrics

We can explore some of those marketing metrics. In your workbooks you can identify:

* Are you able to measure your current market share?
* Are you aware of what the number of participants who will require your products and services are in your existing markets?
* What's your percentage, what's your proportion, of that market?
* Do you view market share as a priority?

You may wish to actually safeguard the market that you have in the case of increased competitive pressures rather than necessarily growing market share. It may be cost prohibitive, or may be too risky for your organisation, to seek market growth, so you may wish to actually sustain the share that you have and make sure that you embed that and generate strong client and participant retention.

* Do you view market share as a priority?
* Why, or why not?
* Why is that, and what impact will that have in terms of your strategic marketing direction, and in terms of looking at participant acquisition and retention?

Take the time to start to identify your market share, and where would you like that market share to be.

* If you're looking at growing, is market share a priority?
* Is it one of the key metrics that will be relevant for you being able to assess marketing performance?

# Slide 14 - Cost Per Transaction

One of the areas where we can often assess marketing performance is through determining the cost per transaction.

* What are the associated costs in gaining a participant?
* What journeys do they undertake?
* What touchpoints are required?

You need to be able to factor those in to make an informed decision around the cost per transaction.

* What are all the marketing activities that you're undertaking?
* What are the touchpoints that those participants have interacted with?
* What journey did they undertake?
* What steps?
* What level of interaction did they have with your organisation?
* Did they visit your website?
* Did they lodge a telephone-based enquiry?
* Did they speak to members of your team?
* Have they encountered you through community events?
* Through brochures?

They're all part of the journey, and need to be equated when you consider the cost per transaction.

* What are the costs for those activities?
* How does that connect with the journeys that they've undertaken?
* What are the touchpoints then that are required?

You can determine that on a per-participant basis. Start to identify how much it costs to acquire a participant, because from there you can start to optimise your marketing activities. How do you reduce the cost per transaction, that cost per acquisition, so you can start to optimise and identify where the stronger elements of your marketing activities are versus others. Identifying those costs enables you then to measure marketing performance.

* If competitive pressures change, what impact will that have on marketing costs?
* How will that impact the cost per transaction and the resulting acquisition that is required as a consequence of that?

Once again, the way you determine that is by determining the journeys that they undertake and the touchpoints that they required with your organisation, based around the costs that you've allocated against each of those relevant activities.

Often you need to be mindful of the lead time:

* How long does it take to go from the pre-purchase phase to purchase and then post-purchase?
* What are the costs along the way?
* What are the touchpoints that are needed?

# Slide 15 - Satisfaction and Feedback

We've discussed at a number of points collating feedback and assessing the level of satisfaction with your products and services. When you assess the level of satisfaction, you need to ensure firstly whether you're asking for feedback.

* Are you actually capturing that data?
* Are you asking questions that are unbiased and don't lead to anticipated responses?
* Are you providing unbiased questions that provide honest answers and honest reflections?
* Are you using a mix of quantitative measures, so ranking your products and services, and then providing opportunities for qualitative responses, where you can delve into further detail?
* What methods are you using to collate that feedback?
* Is it purely an online survey?
* In which case, are there segments of your market that aren't accessing it?
* If it's an offline survey, how are you encouraging participation?
* Are you providing those survey forms?
* Are you encouraging feedback?
* Are you having one-on-one interviews or focus groups with those participants?
* Are you asking the same questions on a consistent basis so you can track performance over time and see firstly whether needs change and whether you're able to demonstrate an impact if you have made modifications based on the suggestions that are provided?

Often, by asking your existing participants, asking your stakeholders, you can identify potential market opportunities. So having the ongoing process of asking for feedback will be critical in measuring market performance, because you can start to track changes in satisfaction, in anticipated outcomes, in what participants and what their stakeholders like about your organisation, and the key attributes and the key value that they see.

Often some of that may change, not only on your internal context, but also the external market.

* Are participants, are stakeholders, becoming more aware of alternatives?
* In which case, are they beginning to look around for other providers, even if it is just to see who else is out there in the market?

This allows you to start to identify the broader market context and the competitive pressures and the uncertainty that may be the result.

So embedding ongoing feedback processes, and making sure that you're using appropriate feedback mechanisms and that you're capturing and collating that data, responding back to that feedback, and asking it in a consistent manner so you can track changes over time.

# Slide 16 - Loyalty

Often when we look at satisfaction, one of the outcomes that comes out of that is the potential for loyalty. Often we measure loyalty by frequency of re-purchase.

* If you're an ongoing service or product, what is the level of frequency around re-purchasing?
* What is the average spend per transaction?
* Is that increasing as your participants, as their stakeholders, become more familiar with the products and services you provide?

You can identify the opportunities around supporting and providing complementary products and services. Another measure of loyalty is:

* Are your participants and are their stakeholders engaging in other products and services offered by your organisation?
* Are they providing referrals?
* Are they recommending you to other stakeholders? Other potential participants? Other community members that may have a need or know of people that have a need that you can fulfil?

There's a number of drivers when we consider loyalty. Frequency of re-purchase is one of them.  Number of referrals can be another, particularly if you're a product or service that doesn't have direct pathways into ongoing retention.

* What is the average spend per transaction if they're re-purchasing from you?
* Who's involved in that re-purchase decision?
* Is the decision-making process becoming simplified as they become more familiar and comfortable with the products and services that you provide?

From there you can determine the percentage of your participants that are continuing on with your services.

* Are they continuing on through each NDIS plan?
* If not, why not?
* Is it because their needs have changed and there's different outcomes that they're seeking? Or is it because they're choosing other providers?

You can ascertain the percentage of participants that are continuing with the services that you're providing.

# Slide 17 - Brand Awareness

Brand awareness is often one that's discussed in the marketing context, but not necessarily clearly understood. When we look at brand awareness, there's two key aspects. There's unprompted awareness.

* Who is it that can recall your brand?
* What other brands do they recall at the same time?

Typically that's run in a focus group type session, or a group session, where you ask a sample of your target market or the broader stakeholders around them:

* What brands, what organisations, do you recall when we discuss disability services?
* When we discuss specific services for early intervention in children, what organisations come to mind?

It's about assessing how aware they are of your existence, and whether they are able to recall your organisation relative to other competitors.

The next phase of that is prompted brand awareness?

* What attributes do they recall when they discuss your brand specifically?
* So as a service provider, what attributes, what values, what beliefs do they have around the products and services and the value that you provide?

You can start to identify why they recall those attributes, because those attributes, the beliefs that they're forming, should be consistent with the value that you are providing and the messaging and the communications that you're demonstrating into the market. If there's a mismatch, often it will demonstrate that there's a level of service delivery or reputational risk that may need to be addressed so that you can realign what people are relating your brand to and the attributes into what it is that you actually provide.

* Do those attributes ultimately align with your strategic marketing plan?

As mentioned, the key way of delving into these insights tends to be through market research, focus groups, and starting to ask those questions to not only your current participants, but prospective participants as well, so you can start to identify the level of awareness around your organisation.

# Slide 18 - Brand Equity

Brand awareness, brand loyalty, acquisition, market share, build into the equity of your brand.

* What is the value of your brand, the brand equity?

Often it's about benchmarking those key attributes and views about your organisation or your brand. The difference here is that a brand may be a combination of products and services that you offer to a defined target market, and that may be separate to your organisational brand.

Typically, as not-for-profit organisations, we need to identify where we want to invest resources in building brand equity. Often that means investing in the brand equity of your organisation, rather than necessarily brands around each specific product or service, because if you run too many brands, if you're operating too many brands, it becomes difficult to maintain brand equity and value across each of those brands, and then ensure that that compounds into your master brand, your organisational brand. You're far better off simplifying brands rather than branding each service or product if there isn't a defined target market that's different to your existing products or services.

If it doesn't require a different marketing mix and a configuration of that marketing mix, question whether you really need a separate brand around it, because brand equity requires resources. It requires you to demonstrate satisfaction levels, to measure that brand awareness, to identify levels of loyalty. You want to be able to compare that with your competitors so you can start to position yourself on core attributes of your organisation, say if it's around quality of outcome and convenience, relative to your competitors in the market, and you can run the focus groups and analyse that data and see where they view your organisation relative to competitors. This allows you to benchmark and review those marketing outcomes.

It's imperative that you invest in brand equity in the right place in your organisation. Often that may mean that there's a strategic decision to consolidate a number of brands, and to focus on loyalty, on satisfaction, on awareness around your organisation and then the corresponding products and services,  rather than the other way around.

# Slide 19 - Marketing Metrics

When we look at our workbooks:

* Are you currently measuring brand awareness?
* Are you currently measuring brand equity?
* If not, why not?
* If you are, how are you measuring it?
* What is the level and the average cost of transaction to secure a participant?
* What touchpoints are required that helps build into the picture around brand awareness and brand equity?
* How are you assessing those metrics?
* What is the frequency of re-purchase?
* What's your overall level of retention?
* Are you measuring referrals?
* Are you measuring the frequency of those referrals or word-of-mouth recommendations?
* How often do those recommendations result in a purchase?
* Can you identify whether the first touchpoint is a recommendation, and how that leads to an acquisition outcome relative to where that recommendation isn't provided?
* Are you measuring brand awareness?
* What are the levels around prompted and unprompted brand awareness?
* How are you measuring it?
* How are you viewing brand equity and what gaps may exist when you measure brand equity as well?

Questions around marketing metrics so you can start to develop your capabilities in measuring marketing performance.

Ultimately it's around utilising those metrics, and there's quite a few others that may be relevant for you,  in terms of the metrics that matter and the impact it has on your organisation.

# Slide 20 - Metrics: Media and Outdoor

What we explored were some headline metrics and the metrics that form the top of that hierarchy of how you assess marketing performance. But there's also metrics around marketing activities, and the execution of marketing activities.

If you're using media and outdoor advertising, media placement, advertisements, there's a number of metrics that you need to consider. The first is circulation.

* What is our total reach of that media?
* Who is the audience?
* Does that audience align with your stakeholders and with the target markets?

Then you need to explore the exposures.

* What proportion of that audience is actually likely to see that media?
* What's our total audience, and out of that, who's actually likely to see that media or that advertisement?
* Where does it fit within the stakeholder journey?

Typically if it's media and outdoor, it'll be around raising awareness, so that pre-purchase phase. What you need to start identifying is:

* What are the overall level of impressions?
* How do those impressions help build awareness that then leads to further engagement through that decision-making process?

Very rarely will it be about using one form of advertising or one form of media. You may need to run a number of advertisements through radio, through newspapers, through outdoor, through other means, to help reinforce that awareness, because your target market, and those that are exposed to the message, aren't necessarily always going to interpret the message due to other factors. They may be distracted at the time and not necessarily recognise or see your advertisement. Or they may be interpreting it in a way that is inconsistent with the values that you wish to provide. So you'll need a number of impressions that build that awareness and sustain that over time so you maintain that level of awareness in terms of your target market. Very much some key drivers that will impact prompted and unprompted brand awareness.

* How does that link back to other marketing efforts?
* If we're looking at advertising in terms of awareness raising and the pre-purchase phase, how does that then link back to other marketing efforts that are required throughout the rest of the stakeholder journey?

# Slide 21 - Metrics: Online

When we look at online,  there's a number of metrics that we need to consider.

Website visitations:

* What is the source of traffic?
* What are the key search terms that they're using?
* Where are the referral sources?
* Which websites are they then going from to visit yours?

Often a good example of identifying potential partners, where you can strengthen and embed that complementary offering and that complementary value to the marketplace, often a good point in being able to identify who some of those prospective partners may be.

Looking at key search terms:

* How do you ensure relevancy around those search terms?

This isn't about investing in things like SEO, Search Engine Optimisation. It's about understanding those website visitations, and where your website is part of the stakeholder journey. Your website may not be destination number one. It could be an advertisement. It could be a recommendation. It could be a referral through other stakeholders that is your first touchpoint. The website may be touchpoint number two. Or in the meantime, they could be asking others about your service and your website could be touchpoint number three. But there's a number of metrics around understanding how valuable that website is in terms of the stakeholder journey and where its place is in the decision-making process.

Similarly with pages:

* What pages are being viewed?
* How are they navigating through the website?
* How long are they spending on your site?
* What content has been accessed?
* From accessing those pages, is it helping to drive them to lodging an enquiry, or undertaking a call to action?
* Where does your website fit within that decision-making process and the steps of touchpoints required in the journey?

Similarly around social media:

* What level of interaction do you have?
* What are your total number of followers?
* What actions are you requiring?
* How many of them are actually responding to the call to action?
* Is it actually delivering tangible outcomes to your organisation?

Some of the core metrics that you need to consider in the online space.

# Slide 22 - Metrics: Events

When we explore events, we need to measure participation, not only how many attended, but how many are likely to attend.

* Were there invitations required?
* Are there key VIP people that you want to ensure are at that event, or at the very least make them aware of that event?
* Who are the target markets for that event?
* Does it differ to the target markets that use you as a service provider, or the stakeholders that interact with you as an organisation?
* How do these target markets relate to your organisation?
* How does engaging those target markets around events, and the participants around events, further embed your ability to demonstrate value?
* Once you've assessed attendance, do you have the ability to engage those attendees?
* What actions would you like those attendees to undertake?
* How do you maintain ongoing engagement?
* How do you maintain engagement with those participants after that event has taken place?

Once again, what is that next step of the journey?

When you look at fundraising, 20 percent of funds can actually come in after a fundraising event. If you've ceased communicating, ceased discussing that event after that event's been held, you potentially miss 20 percent of potential donation sources. It's about understanding how you foster engagement after those activities and demonstrate that there's opportunities to still maintain a level of involvement, and how you then, if you're running a regular series of events, encourage those participants to come to future events as well.

# Slide 23 - Metrics: Contact

When we look at metrics around contacts, we need to explore:

* How are enquiries lodged?
* Are they telephone-based enquiries?
* What is the source of those enquiries?
* Who's capturing that data?
* How many enquiries are being lodged with your organisation for the provision of your products or services?
* What follow-ups do you need to embed to follow up those enquiries, so that you actually proactively follow up when an enquiry is lodged and see how you can assist them to come to a decision?
* If there's email enquiries, how are they lodged?
* What processes are followed to manage email enquiries as well?
* How do you make contact with the participant or the stakeholders around them that are making that enquiry as they're going through that decision-making process?

This is often the point where you become aware that someone is proactively interested in your products or services, so your aim here, when those enquiries are lodged, whether via phone, whether online, whether through other means, is trying to convert them into a prospective customer, trying to convert them into an active participant, ensuring that they commit to your product or service. That's the acquisition piece.

* Are there meetings that you need to arrange?
* What information is required around those meetings?
* What is the next step of engagement?

It's not just a matter of giving a brochure. It's about talking through the value that you provide and how that aligns in terms of the outcome that participants, stakeholders, are seeking, once again identifying where that contact phase is in terms of that decision-making process.

Typically that will be in that investigative phase, in that search phase, as they're moving to the end of those pre-purchase considerations. So as they've contacted you, they may actually have contacted other providers. You may not necessarily know who those other providers are, but:

* What is the value that you need to demonstrate?
* How does it align with the value that those stakeholders and participants are seeking so that you can help strengthen that ability to convert them into an acquired participant? Into a participant that's going to be utilising your products and services relative to the competition?

# Slide 24 - Sequencing Metrics

We've explored a number of metrics, but ultimately these metrics need to be sequenced against the decision-making process, and against that stakeholder journey and through the marketing mix, the customer, the stakeholder experience, that you are providing. By sequencing those metrics, you can identify what steps are being undertaken by your stakeholders, and what's the relative importance of each stage.

* What is the impact on acquisition, and acquiring that participant, if there hasn't been a recommendation, or if they haven't had a specific discussion around their needs and they've just purchased the product or service, or looked at trying to purchase the product or service?
* What's the critical path?
* What are the key steps that need to be factored in to strengthen acquisition and retention?

Once we start to work through that sequencing and identify those critical paths, we can then start to optimise our marketing activities and the resources that we allocate to those marketing activities by being able to determine what steps are crucial in that stakeholder journey, and what steps reinforce the experience that you are creating and the value that you provide to those participants and to those stakeholders. We need to be able to correlate our stakeholder journey against our stakeholder experience at each step of the way through that decision-making process.

We explored a number of metrics before that examine different steps, and different tools that we may use to engage during different steps, of that stakeholder process and that decision-making process, and the steps that are required to make those decisions. We're now able to start sequencing those metrics and determining which are required to lead to the outcomes that we're seeking to realise through our strategic marketing plan. That will essentially be one around acquisition and retention.

# Slide 25 - Marketing Metrics

Turning to our workbooks, you can now explore:

* What journeys do your stakeholders undertake?
* What's the importance of each step?

Draw on your own knowledge of your stakeholders:

* What activities are being undertaken?
* What inputs, what outputs, what outcomes are being delivered?
* What gaps currently exist in being able to measure marketing performance?
* How do you fill those gaps?

So exploring the current activities that are currently in place.

* What are the inputs around those activities?
* What outputs does it create?
* What are the outcomes?
* Who are the stakeholders that your'e reaching for each of those activities?
* What journeys are they undertaking as they work through engagement and touchpoints with your organisation?

# Slide 26 - Responsibilities for Metrics

As we've explored metrics and measuring marketing performance, we also need to determine responsibilities.

* Who is responsible for reporting and being able to achieve those metrics?

As we've explored in the roles and responsibilities module, marketing is both a vertical and a horizontal function. We need to correlate metrics with those appropriate roles, and they may sit across your organisation. Some of those inputs may not necessarily be, and their corresponding outputs, may not necessarily be the responsibility of marketing directly, but there's obviously an indirect responsibility through marketing in taking those inputs and outputs and corresponding that to the outcomes that are created.

* How does that work across your organisation?

That's why you need to identify how each of those metrics build the desired outcomes that you're seeking to create, build on the outcomes that you're seeking through your strategic marketing plan, build on the impact at an organisational level through your business or organisational plans.

Metrics enable you to maintain clear accountability and responsibility. That helps you alleviate risk, because you can identify what potential risk factors are in place, how you can mitigate that, and how you can measure it. Determining those responsibilities and what marketing metrics people are going to be responsible for in your organisation is a critical step in being able to measure marketing performance.

# Slide 27 - Utilise Research

A number of metrics we've explored need solid research. Brand awareness, unprompted, prompted brand awareness, is the classic example. The way to undertake that research is by identifying your key target markets, and being able to articulate the sample size that is required.

* How many participants, or prospective participants, or their stakeholders, do you need to reach when you're undertaking that research?

It's very important that you ask relevant questions, questions that allow you to make informed decisions as a result. So if you're exploring brand awareness, you need to ask the questions around:

* What is your view of our organisation?
* What attributes do you associate with us?
* How have you shaped those experiences?

Questions that enable you to analyse and interpret those findings.

Typically you'd want to run more than one focus group, because that allows you to cross-reference those findings and identify what are some of the core elements and where there may be exceptions to what is the standard sort of view around your prospective target market.

You need to be able to determine a research methodology that enables you to apply research on a consistent basis that reinforces the ability to determine key insights. Consistency is critical. So if you're assessing brand awareness, if you're assessing satisfaction, if you're assessing loyalty, be consistent in how you measure it, because that enables you to track and evaluate performance over time.

If you're maintaining surveys, make sure that you ask a similar question set so you can compare past results, and you can track how those results are changing over time.

* If there's positive results, why is that?
* If there's adverse results, why is it?
* How can you mitigate and remediate any adverse results?

They might not necessarily be due to a decline in your organisation's ability to deliver products or services. It could be due to competitive pressures, to alternative products or services that are shaping perceptions. It may not necessarily be due to factors caused directly by your organisation. It could be due to those market pressures that are influencing perceptions, and therefore influencing the attributes, the values, the beliefs, around your organisation.

Good research supports your marketing audit. Effectively, as we've been going through the workbooks, we've been developing a marketing audit that enables you to assess your current state of marketing in your organisation, enables you to start to make informed decisions around what resources are required to strengthen your ability to face the market.

# Slide 28 - Capture Data

We've also explored the need to capture data, and this is imperative in being able to measure marketing performance. You need suitable systems. You need systems in place that enable you to capture data across that customer or stakeholder journey, and you need to include both offline and online metrics. Make sure that the systems you use - and this could be a customer relationship management tool - can capture offline metrics as much as they can around online metrics through web analytics, through social media interactions, and through that level of integration. Imperative that you're able to incorporate offline metrics and the offline marketing activities that you're undertaking as well.

As you're capturing data, make sure that you also retain the responses that are provided. Define those questions, your sample size and composition around your surveys and focus groups, and explore how you actually retain those findings so you can once again track changes over time. And you need the systems in place that allow you to capture and maintain that data, and to demonstrate as part of your marketing reporting frameworks, the changes in sentiment, changes in loyalty, changes in market share, over time.

This allows you to compare against benchmarks, not only against your own organisation and historical performance, but also potentially positioning around competitors and what their market share is relative to yours. It allows you to start to identify benchmarks and where you want to be in terms of your strategic marketing direction and the outcomes that you're wishing to see.

And of course, you need to be able to evaluate and review, and you need the systems in place that enable you to undertake that evaluation, review the findings, and see what impact that is going to have. You need the systems in place that enable you to do that.

Behind those systems you need the processes to ensure that people are actually entering in the appropriate data, particularly important for things like offline metrics where it may not necessarily be integrated into your data capture platforms in the same way that web visitations may be. So you need to ensure that your processes are in place so that data is being captured. You need to maintain those systems so you're able to have the fields that track that data.

Similarly, when you're looking at stakeholder relationships, you need to document the level of interaction.

* How frequent is interaction with those stakeholders?
* How frequent does that interaction need to be to maintain awareness?

These are some of the metrics that you need to capture beyond just base contact details. It's around:

* What level of interaction?
* Who has it?
* Who's been responsible for interacting with those stakeholders?
* What are some of the key discussion topics?
* What have been some of the key outcomes?
* Have they been followed up on?
* Have you been able to demonstrate a return from those activities?

# Slide 29 - Marketing Metrics

* How do you currently capture data in your organisation?
* Do you use an organised customer relationship management tool?
* Are you running spreadsheets or other databases in capturing that data?
* Does it have the fields required to adequately capture marketing metrics?
* If not, what additional fields may be required?
* What do you need to provide to ensure that you're capturing that data adequately, and that you're able to maintain that data over time and demonstrate changes in results, and be able to start to document what is causing any of those variations?

Work through the workbook and examine what systems you have in place for capturing data.

It may not necessarily just be one system. You could be using a customer relationship management tool. You could be using analytics on your website. You could be using tools through social media. There may be a number of disparate tools. It's about identifying:

* What tools are you using to measure that data?
* How are you actually leveraging from the data that you're collecting?
* It may be as simple as documenting every time that brochures are being dispatched.
* How many of those are being sent?
* Who are they being sent to?
* What sort of return is being provided as a result?
* How then do you document those activities and measure its return?

# Slide 30 - Marketing Can Be Measured

As we've explored, marketing can in fact be measured. You need to be able to identify suitable marketing metrics, and work through the relevant inputs around your marketing activities. You need to correlate those inputs with the outputs that are the result of undertaking that activity. Those outputs need to correlate to a marketing outcome. You should be able to demonstrate through those outputs a link to the outcomes that have been identified in your strategic marketing plan. That in turn enables you to reinforce the impact on your organisation.

* How does marketing help achieve your strategic direction?

You're able to measure that through the outcomes of your strategic marketing plan.

We've explored the need once again for consistency. Be consistent in how you measure marketing performance. Yes, you may have gaps. Yes, you need to resolve those gaps. But be consistent in how you're then measuring marketing performance, documenting those activities, so that you can make those informed decisions.

And you need to ensure that there's clarity around who's responsible for reporting on which metrics.

* Who is responsible for capturing the data?
* Who's responsible for reporting on the data?
* Who's responsible for interpreting it and making those informed decisions?

Once again, have the roles, have the defined responsibilities in place, and the levels of delegation, so that those decisions and activities can be undertaken.

# Slide 31 - Outcomes

We've learned a number of outcomes through this module. The first, most importantly, is that marketing in fact can be measured, and that there are marketing metrics both online and offline. It's about leveraging the metrics required across online activities as well as offline activities. Don't believe that offline activities are not measurable. Yes, it may not be as seamless as online activities, but they can often be measured, and you need to identify the chain of activities that build through those offline activities in the same way that you do in terms of online activities.

Don't confuse inputs, outputs and outcomes, a very common situation that can particularly occur with online marketing metrics. Don't confuse an input like social media followers for an output that might be interaction. Don't confuse someone visiting your website to an output that should be undertaking or enquiring around your call to action. Make sure that you clearly understand the differences between those, because if you confuse inputs for outcomes it creates a tenuous link and makes it very difficult, in fact almost impossible, to measure marketing performance.

Your metrics should be based on research, and should be based on informed research that then in turn allows you to make decisions based on the findings that is undertaken.

You need to sequence and leverage your metrics. Sequence your marketing metrics against those marketing activities, against the steps in the decision-making process, against the experience that you're creating. Correlate those activities against the stakeholder journey, against the stakeholder experience, and then explore those variations and where you need to strengthen performance and where there may be areas where you're overperforming, and what impact do each of those combinations have in terms of acquisition and retention.

You need to identify appropriate roles and the responsibilities within those roles around reporting and delivering on marketing metrics, and you need the systems in place to capture the data.

This draws us to a close in our series on marketing governance, exploring the five pillars of marketing governance for disability service providers. The NDIS is a fundamental change to the way that you provide products and services to the market, but they are challenges that can be overcome, challenges that, with the right marketing approach, with the foundations of good marketing governance, you can overcome and be in a position of strength.

Be mindful of shifts in the market, particularly competitive pressures, and the introduction of substitute products or services. Ensure that your marketing direction is aligned strategically with your organisational direction. Be aware of risks and how you manage those. Identify your resources, your available resources, and what resources are required to deliver upon your strategic marketing plan. Have clear roles. Have clearly defined responsibilities. And have the metrics in place so that you can measure marketing performance.

I wish you the best of luck as we go through the transition into the NDIS, and as you become NDIS providers and providing those services to your target markets. The role of marketing will be critical to how you position your organisation, how you retain, how you acquire participants. Good marketing governance serves as the foundations to delivering marketing outcomes that have an impact on your organisation.

My name is Alex Makin from Syneka Marketing. It's been a pleasure taking you through this series. Please do stay in touch if you have any questions around the workbook content. We look forward to seeing your organisations thrive in an NDIS-enabled environment.

Thank you for your participation.