

CHANNEL MARKETING AND AUDIENCE SEGMENTATION

PLANNING WORKSHEET FOR MISSION-DRIVEN ORGANIZATIONS

SECTION 1: CLARIFYING CORE AUDIENCES

Purpose: This section helps you clearly identify the people and groups who are most connected to your mission and impact. By defining core audiences based on relationship and engagement, you create a foundation for communication that feels relevant and intentional. Clear audience definition allows your organization to focus its energy, strengthen relationships, and align outreach with purpose rather than volume.

List the key groups that engage with your mission. Focus on relationship, not demographics.

Core Audience Groups

(Examples: Donors, Volunteers, Program Participants, Partners, Advocates, Community Supporters)

For each audience, briefly note how they connect to your mission:

- What role do they play in your impact?
- What do they most need from your organization?
- What action do you most want them to take?



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SECTION 2: DEFINING PRIMARY MARKETING CHANNELS

Purpose: This section clarifies how and where your organization communicates with each audience. Channel clarity supports sustainability by helping teams know where to focus and why.

List your active marketing channels:

- Email
- Social Media
- Website
- Events or In-Person Engagement
- Print or Other

For each core audience, identify a primary channel and primary goal.

AUDIENCE	PRIMARY CHANNEL	PRIMARY GOAL

Reflection Questions:

- Which channels already perform well?
- Where does your audience naturally engage most?



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SECTION 3: MESSAGING ALIGNMENT BY AUDIENCE

Purpose: This section ensures your messaging reflects the relationship each audience has with your organization. By aligning message, tone, and call to action, communication becomes clearer and more compelling. Thoughtful alignment helps audiences feel seen, understood, and motivated to engage more deeply.

For each audience, define the following:

Audience: _____

- Core message or theme:
- Key story or proof point to highlight:
- Primary call to action:
- Tone or emotional focus (Examples: inspiring, informative, community-centered, urgent):



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SECTION 4: PHASED ROLLOUT PLANNING

Purpose: This section helps you move from planning to action in a structured, achievable way. A phased rollout allows your organization to build clarity first, then deepen impact over time without overwhelming teams. This approach supports steady progress and long-term sustainability.

PHASE 1: FOUNDATION

- Organize existing audience data
- Assign primary channels and goals
- Document current messaging

Timeline: _____

PHASE 2: TARGETED MESSAGING

- Segment email lists
- Align social and web content
- Refine messaging by audience

Timeline: _____

PHASE 3: REFINEMENT AND GROWTH

- Review engagement metrics
- Adjust messaging and timing
- Expand segmentation where helpful

Timeline: _____



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SECTION 5: MEASUREMENT AND LEARNING

Purpose: This section supports ongoing learning and informed decision-making. By identifying a small number of meaningful indicators, you create a feedback loop that helps your organization understand what is resonating. Measurement here is about insight and improvement, not perfection.

For each channel, identify 1–2 indicators of success.

CHANNEL	WHAT SUCCESS LOOKS LIKE
Email	
Social Media	
Website	
Events	

Reflection:

- What patterns or insights are emerging?
- Where is there opportunity to build further momentum?



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SECTION 6: SUSTAINABILITY CHECK

Purpose: This section ensures your marketing system is designed to last. By checking for clarity, documentation, and repeatability, you reduce reliance on individual staff members and support continuity through growth or transition. Sustainable systems protect your mission and support long-term impact.

Answer yes or no:

- Our messaging is documented and repeatable
- Our channels have clear purposes
- Our audiences receive relevant communication
- Our system can continue through transitions

Notes or adjustments needed:

CLOSING REFLECTION:

Marketing works best when it is intentional, focused, and aligned with mission. This worksheet is designed to support clarity, confidence, and forward momentum. Revisit it during planning cycles to ensure your marketing continues to grow alongside your organization.



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