



Announcing the Fall 2017 Collegiate Maxi Oral Case Competition

Topic: *IMC Marketing Plan for a Designated Organization*

Presented by the

**Direct Marketing Association of Washington
Educational Foundation (DMAW/EF)
Cash Prizes to be awarded to Top Teams**

Section I – Overview of the Competition/Guidelines (Pages 1-4)

Section II – Case Competition Options (Pages 5-7)

Section III – Promotion Cost Guidelines (Page 8-9)

The Competition— *Integrated Marketing Campaign for Selected Organization*

The Collegiate MAXI Oral Case Competition for the Mid-Atlantic region, Fall 2017, offers students a choice among different organizations. Student teams will be able to select one from among the listed organizations and create an Integrated Marketing Communications (IMC) plan that is designed to help resolve the challenge of that selected organization.

The Organizations

- **Sierra Club**
- **Philadelphia Museum of Art**

The Challenge

What recommendations does your team have for one of these organizations seeking funds in a crowded marketplace? With international and social issue fundraising activities reaching an all-time high, it is getting harder to compete for donor dollars. What marketing strategy would your team recommend be used to forge ahead in this politically-charged atmosphere? Please develop a multi-channel marketing campaign to incorporate direct mail, email, digital advertising, social media, telemarketing and other relevant channels for fundraising that encompasses your recommended strategy for this organization.

The Case Competition

The student team is to respond to the challenge from the selected organization. The team should describe the goal of the campaign and audience segment(s) that the team seeks to reach, including the segment/audience profile(s). The team should provide a brief SWOT assessment of the organization (based on publicly available information). The team should describe its overall creative strategy, explaining how this strategy builds on the SWOT assessment.

The team should provide the following:

- A strategy brief that includes a solid, measurable goal in regard to the team's proposed marketing efforts. The strategy brief should state where the organization is presently – then where the team feels the organization would be as a result of the team's campaign.
- A sample of the team's proposed creative campaign copy and design for print or online components, sample digital ads and sample social posts for Facebook, Twitter and/or other optional social channels. Please note the intended audience segment/target for each creative element.
- An expense budget and projected revenue for the campaign. The team's budget can be generalized, if necessary. Example campaign costs and response rates are listed later in this document for use.

Other communication approaches are also encouraged. For example, the team might also propose developing a mobile, video or outdoor campaign that may be used to reach specific segments of the team's identified target segment or sub-segment, if this approach seems appropriate. Regardless, the target audience selected by the team should drive the organization's unique focus, but, depending on the organization's goals, does not need to reflect all the segments targeted by the organization.

Awards

Cash prizes will be awarded to the top teams the day of the competition. The awards will be announced at the conclusion of the oral competition event.

Budget

The case budget for the team's campaign for each one of the organizations is \$100,000, to be used for the creation of the team's campaign promotional materials and media/advertising budget. Note that this amount need not cover implementation costs (for example, if an organization already has a social media employee team, your proposal development would be an expense, but the ongoing social media messages would be the responsibility of the current social media employees of the organization). Teams are also permitted to submit a campaign design that would be deemed to be more expensive than the current budget, but the team needs to also provide its reasons for this increased expense. In all cases, teams should provide a general summary regarding costs of the team's recommended campaign along with the team's rationale for the campaign. Please also project expected revenue driven by campaign efforts. Remember the goal of the campaign is to raise funds for the organization.

Presentation Guidelines

Teams will have 15 minutes for the team presentation, followed by 10 minutes for questions by the judges. Ideally, all teams will preload PowerPoint slides ahead of all presentations, and each team will have five minutes for setup before starting their presentation. Teams may be composed of 2-4 presenters, and all team members should be undergraduate or graduate in status. Teams should use secondary research in their marketing plan development, but are NOT to contact the organization (or an agency with a client-relationship with the organization). All information utilized by the team should be from the public domain. Primary research is also acceptable and encouraged.

Deliverables

Teams should bring 8 printed copies of the team's deliverables, arranged as described below. The team needs to submit these printed materials upon arrival when checking into the competition and the team's oral presentation must reflect these written materials.

All pages should have a header line identifying the team and page numbers. If substitute presenters replace the original presenter names on the day of the presentation, hand-written changes can be made on the copies at the competition:

1. Title page, including name, class level, email, and cell phone contact of all presenters, as well as name and contact information of professor or advisor. Title page should also include school name and postal address as well as department or club name;
2. Executive summary (max, three pages, double spaced, although bullet phrases may be single spaced);
3. Sample hard-copy of campaign asset copy/design/ and/or sample digital advertisements, social posts, etc.
4. Any other samples or illustrations of samples of other communications, such as direct mail pieces (and envelope if needed), should also be provided, (as well as pictured on slides) if the team has chosen to utilize such communications. If so, rough sketches are acceptable (this is not a graphics competition).
5. Pictorial summary copy of the team's PowerPoint slides (can be 3 to 6 slides per page—slides just need to be legible) and/or all other graphics or other descriptive materials. If using Prezi instead of PowerPoint, please provide print versions of all pertinent slides that are clearly legible.

Disclaimer

The cases presented here, including all the respective organizations, are primarily based upon publicly available information. These case studies reflect the sole views of the case authors, and are not intended to represent any official statement by any of the participating organizations, agencies, or other individuals. Presentation materials may be shared with organizations participating in the competition.

Case Presentation Details

The oral case competition will be held on Friday, November 3, 2017, at CCAH (Chapman Cubine And Hussey), 2000 15th Street, North, Suite 550, Arlington, VA 22201. Winners will be announced at the completion of the day.

Because this is an Oral Case Competition, open to all higher educational academic institutions throughout the Mid-Atlantic region, hopefully inclement weather will not be a transportation issue and will not present a critical problem to teams commuting to the presentation site.

Schools may enter up to two teams. Each presenting team is to be composed of 2-4 members, and teams from the same school need not have the same number of team members on each team. The Collegiate MAXI Competition is open to both undergraduate and graduate students, but teams must be composed of entirely one level or another. Undergraduate and graduate students will be assessed on separate tracks in the competition.

For this oral competition, students are to provide content via their oral presentation accompanied by graphics and/or audio-visuals, along with the requested copies pertaining to the team's oral presentation (see above) which should provide a clear summary of the team's marketing plan.

DMAW/EF Student Ambassadors are encouraged to attend this oral case competition, either as one of the case presenters, or by accompanying the school's team(s) to this event. Student Ambassadors are also encouraged to attend this event, and are able to bring a guest, even if the respective school is not involved in case presentations.

Extension of oral case into written semester assignment

Professors who will be utilizing this oral case competition as part of their class deliverables are encouraged to assign a written case component due at the end of the semester although the written portion will not be part of this case competition.

Criteria for Success

Entries will be evaluated, based on the stated objectives of the respective organization's case challenge, that is, how effectively the proposed plan achieves those objectives. Entries will also be judged on effective use of marketing channels (online and/or off-line), creativity, originality, and anticipated impact.

Deadlines

The oral case competition will be held on Friday, November 3, 2017, at CCAH (Chapman Cubine And Hussey), 2000 15th Street, North, Suite 550, Arlington, VA 22201.

All teams or schools need to send in the **intent to compete/attend** form, which must be received by Friday, **October 6, before 5:00 PM**. This information is needed so adequate arrangements can be made for the number of attendees at this event. **We are only able to accept ten total teams for our completion, so please submit intent to compete/attend forms early.** Each academic institution is able to send up to two teams to the competition, along with each team's professor or advisor (if available) and, hopefully, the DMAW/EF student ambassador if present at that school. Student ambassadors are encouraged to attend this oral competition even if their respective schools are not involved with the case competition and may bring a guest to this event. Even if not involved with the case competition, all student ambassadors NEED to complete an Intent form, along with guest information, for competition planning purposes.

The case challenge, organization identities, and instructions are provided here by the DMAW/EF. Students will have all the time in the semester up to the date of the competition to develop their campaign for this oral case competition.

Contact information for the DMAW/EF is: Amy Steinbicker; administrator@dmawef.org or, **DMAW/EF, Attn. Executive Administrator, 200 Little Falls Street, Suite #205, Falls Church, VA 22046. 703-407-1663**

Organization Overview – Sierra Club



**Mission: To explore, enjoy, and protect the wild places of the earth;
To practice and promote the responsible use of the earth's ecosystems and resources;
To educate and enlist humanity to protect and restore the quality of the natural and human environment; and to use all lawful means to carry out these objectives.**

Founded by legendary conservationist John Muir in 1892, the Sierra Club is now the nation's largest and most influential grassroots environmental organization -- with over three million members and supporters. Our successes range from protecting millions of acres of wilderness to helping pass the Clean Air Act, Clean Water Act, and Endangered Species Act. More recently, we've made history by leading the charge to move away from the dirty fossil fuels that cause climate disruption and toward a clean energy economy.

Direct Marketing Overview

The Sierra Club has a very strong direct fundraising program, utilizing multiple direct marketing channels to reach prospects and donors including direct mail, digital marketing (email, social media, digital advertising), mobile messaging and others. The Sierra Club engages members, donors, activists and prospects at both the national and local levels. Anyone who makes a donation of \$15 or more, is automatically considered a member of Sierra Club.

Sierra Club's monthly donor program is called the Wilderness Guardian program. Because we have their credit card on file, these supporters are highly valuable. A \$15/month pledge typically translates into \$500 of lifetime value for Sierra Club. Since Election Day in 2016, our base of Wilderness Guardian support has grown from 20,000 to more than 90,000 strong. More than 80% of that growth is occurring online, with the remainder being driven primarily via telemarketing. Prospect direct mail continues to focus primarily on 1x donations.

- The average age of pre-election Sierra Club monthly donor was 58. Post-election, the average age of a newly acquired monthly donor is 55, 12% millennial and 27% GenX.
- Approximately 60% of new members are acquired via prospect direct mail while 40% are acquired online. The vast majority of new online members are acquired via emails to our 2 million+ advocacy action takers.

Since the 2016 election, the Sierra Club has experienced a groundswell of support, specifically from some Millennial and Gen X audiences. Thousands have joined, donated to, or become an activist for the organization. This has accomplished primarily via messaging related to standing up to President Trump. Simultaneously, the organization has begun work on repositioning its brand, updating its website and engaging more diverse audiences to better reflect an evolution towards becoming a more equitable and just organization, that is also more reflective of the demographics of our country and communities.

Challenge

Design a multi-channel marketing campaign to help Sierra Club engage and retain first time millennial and/or Gen X members or donors since November 2016

OR

Design a multi-channel marketing campaign to convert first time advocates since November 2016, to members or Wilderness Guardians. How should the organization continue to educate and engage these audiences, with what messaging, marketing channels and tactics?

Organization Overview – Philadelphia Museum of Art



We are Philadelphia’s art museum. A landmark building. A world-renowned collection. A place that welcomes everyone.

We bring the arts to life, inspiring visitors—through scholarly study and creative play—to discover the spirit of imagination that lies in everyone.

We connect people with the arts in rich and varied ways, making the experience of the Museum surprising, lively, and always memorable.

We are committed to inviting visitors to see the world—and themselves—afresh through the beauty and expressive power of the arts.

Direct Marketing Overview

The Philadelphia Museum of Art (PMA) has a strong integrated direct marketing program designed to both recruit and retain museum members. Current members are also solicited to upgrade or give to the annual fund once a year. PMA utilizes mail, telemarketing, and digital marketing to reach members. In addition, digital marketing and print media is also used to drive ticket sales to the Museum.

Membership numbers can fluctuate greatly based on the special exhibition schedule at the Museum. In FY12, PMA reached a recent peak of 70,000 members during the Rembrandt/Van Gogh exhibitions, but since then we’ve seen a leveling off of membership numbers. Membership dipped to under 50K members in FY13. Through a combination of reintroducing and increasing focused direct marketing efforts not only around special exhibitions, but also the institution and its permanent collection, the active membership has grown in more recent years. In FY16, the most recent complete fiscal year, the total current member number was just over 45K.

Challenge

The Philadelphia Museum of Art relies on ticket buyers to provide internal prospects for membership solicitations. Currently, the museum is undergoing a nearly \$500 million renovation to restructure the layout of the museum. Planned to finish by 2020, this “Core Project” will open up significantly more gallery space and restore areas of the building that have been unopened since the 1960s.

During the renovations, PMA does not plan to host any “blockbuster” special exhibitions, and none of the exhibitions will require advance ticket reservations that capture a prospect’s mailing information. Historically big exhibitions like those focused on Impressionism have driven large volumes of ticket sales and membership conversions. In order to maintain a pool of ticket buyers for membership solicitations during the Core Project, PMA must stay top of mind in the Philadelphia arts market, as well as find new ways to drive advance online ticket sales for general admission.

Design a multi-channel campaign to attract and keep potential PMA visitors engaged with the museum over the course of the Core Project and drive advanced ticket sales. Develop a campaign to convert visitors to members or donors of the museum.

Collegiate MAXI Promotion Costs

	Test promotion - 25,000 pieces prices per thousand pieces	Rollout promotion - 250,000 pieces prices per thousand pieces
Direct mail		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Printing	\$130.00	\$99.00
Personalization and D.P.	\$78.00	\$63.00
Mailing	\$67.00	\$47.00
Postage	\$165.00	\$165.00
Lists	\$100.00	\$100.00
Total	\$670.00	\$487.00
	per thousand	per thousand
Email		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
E blast (transmission)	\$30.00	\$30.00
List	\$150.00	\$150.00
Total	\$310.00	\$193.00
	per thousand	per thousand
Newspaper Ad		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Run Of Press Rate	\$40.00	\$40.00
Total	\$170.00	\$53.00
	per thousand	per thousand
Magazine Ad		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Run Of Press Ad Rate	\$60.00	\$50.00
Total	\$190.00	\$63.00
	per thousand	per thousand
Telemarketing		
Script Writing	\$35.00	\$3.00
Calling	\$90.00	\$85.00
List	\$100.00	\$100.00
Total	\$225.00	\$188.00
	per thousand	per thousand

Banner Ad Network		
Copy Writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Ad Network Pay Per Click Rate	\$40.00	\$30.00
Landing Page Web Hosting	\$75.00	\$40.00
Total	\$195.00	\$78.00
	per thousand	per thousand
Paid Search Ad		
Copy writing	\$50.00	\$5.00
Design	\$80.00	\$8.00
Pay Per Click Rate	\$20.00	\$15.00
Landing Page Design	\$60.00	\$6.00
Landing Page Web Hosting	\$75.00	\$40.00
Total	\$285.00	\$74.00
	per thousand	per thousand

Collegiate MAXI – Campaign Response Estimates

Channel	Response Rate	Average Gift
Direct Mail Acquisition	1%	\$18.00
Direct Mail Housefile	5%	\$25.00
Email	0.08%	\$60.00
Social Media	0.10%	\$30.00
Display Advertising	0.10%	\$45.00
Search Advertising	0.10%	\$45.00

Collegiate MAXI – Sample Calculation

Net Revenue on Direct Mail Acquisition package

Quantity: 100,000

Cost: $(670 * 100) = \$67,000$

Gross Revenue: $(1\% * 100,000) * \$18.00 = \$18,000$

Net Revenue: $\$18,000 - \$67,000 = (\$49,000)$