

# Your Cause Marketing Starter Kit

10 Easy Worksheets To Help Your  
Business Get Ahead In A Nice Way.

**PEACE OF THE PIE**  
Communications and Advocacy

# #1: Who are you?

My business is (use some adjectives):

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My business does:

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My business is special and different  
because (USP):

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# #2:

## What are you trying to do?

I want to do a (CRM) Cause Related Marketing program because:

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The following social issues, charities, causes and 501c3's are important to me:

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They are important because:

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# #3:

## Who are your stakeholders?

The customers, prospects and people who work in and support our organization are:

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I'd describe our various stakeholders -- ages, hobbies, male/female, income level, outside interests, education, etc.

(Group 1) :

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(Group 2) :

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(Group 3) :

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#4:

What is your competition doing? In other words, what's already been done?

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What CRM programs have you seen that you like? And why?

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#5:

What resources can you  
put to use in a CRM?

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How can your resources uniquely benefit  
a cause or help those in need?

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How can these resources benefit your  
potential business partners?

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#6:

Which cause marketing elements appeal to you?

Festivals/events

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Galas/fundraisers

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Transactional (% of profits to charity)

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Social media

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In-store point-of-purchase

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Creative name & promotion idea

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T-shirt and/or souvenir sales

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Advocating change

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Clothing or food drive

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Volunteering (staff)

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Publicity

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Pinups

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Merchant association campaign

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Industry (ie: multi-restaurant) program

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Other

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# #7: What's your budget?

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How much time can **you** realistically give to a CRM program?

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How much money, goods or services could you donate to a nonprofit for a 1<sup>st</sup> year program? What's a reasonable goal?

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What staffing and other resources do you have to contribute to the program?

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Bottom line: How much \$ do you want to spend to promote your "support of a nonprofit or social cause?"

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#9:

# How do you envision your 1<sup>st</sup> year program?

Start date:

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End date:

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Who, what, when will you help?

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Who, at your organization, will help?

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How many biz partners will you have?

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How much publicity should you get?

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What else can you think of?

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# #10: Your final brief worksheet:

Your business is:

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Your cause marketing program will be:

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It will benefit:

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You'll do the following activities to reach your goal. (Campaign Elements):

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Your desired outcome is:

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Your budget is:

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Your partners & their responsibilities:

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Your kick-off date:

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Your finish date:

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Worksheet all done?  
Completely inspired?  
Need some help?  
We can help you:

- Find your nonprofit partner
- Develop a winning Cause Marketing plan
- Create a memorable hook, name & materials that get attention for your brand and excite your stakeholders and staff
- Spread the word about all the good you do via traditional & social media
- Be a loyal advocate for your business
- Help your business get ahead in a nice way

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