

# ELLER BUSINESS CONSULTING MARKETING PLAN - USERGUIDE

ROTARY DISTRICT 5500



ROTARY DISTRICT 5500

4313 N Placita de Susana, Tucson, AZ 85718



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## Marketing Plan for Building Successful Partnerships between Rotary Clubs and Local Businesses

Rotary clubs are renowned for their philanthropic endeavors and community service. To achieve their mission of serving humanity, Rotary clubs rely on partnerships with businesses that share their values and commitment to making a difference. These partnerships offer several benefits, including increased awareness of Rotary's mission and access to resources that can help achieve the club's goals. However, identifying and building successful partnerships with local businesses is not always an easy task. Partnering with Rotary can be a great way for organizations to amplify their impact and reach. Rotary clubs are often deeply embedded in local communities and have a strong understanding of the needs and challenges facing those communities. Through partnerships with Rotary, organizations can tap into this local knowledge and gain access to a powerful network of volunteers who can help drive their initiatives forward.

This marketing plan guides Rotary clubs in three sections: Streamlining Focus Area, Identifying Potential Partners, and SMART Goal and Strategy Framework Crafting. Rotary clubs should choose one of the seven focus areas to engage potential partners effectively, achieve measurable impact, and gain wider recognition. In section one, clubs learn to identify potential partners and align them with Rotary's mission and values. In section two, clubs learn to differentiate themselves from other charitable organizations and identify their unique selling points. Section three introduces the S.M.A.R.T. framework for developing measurable goals, breaking them down into smaller objectives and strategies. This plan helps Rotary clubs streamline their efforts and achieve significant outcomes in their communities.

There are many benefits to partnering with Rotary, including access to a global network of community leaders, opportunities to connect with local communities, and the ability to tap into Rotary's vast volunteer network. Additionally, by following Rotary's partnership guide, clubs can gain insights and best practices for developing effective partnerships that drive meaningful change. Overall, this marketing plan provides a roadmap for Rotary clubs to build successful partnerships with local businesses aligned with their mission. By following the steps laid out in this plan, Rotary clubs can build better communities one partnership at a time.



## Identifying a Focus Area

### Approaching a business for assistance for financial donations, volunteers, and membership

Rotary Clubs serve communities worldwide and have been adapting and improving the way they respond to unique needs by taking on a broad range of service projects. The most successful and sustainable Rotary service tends to fall within one of the seven focus areas.

When approaching a business for assistance for financial donations, volunteers, and membership, it is important to pick one of these focus areas. Here are the reasons why:

1. **Clear direction:** Focusing on one of the seven areas of focus will give the club a clear direction and help them to be more specific about what they want to achieve. It will also help to communicate their goals and objectives to the business in a more structured and organized way.
2. **Better engagement:** By picking one of the focus areas, the club can engage the business more effectively by identifying the areas where they can contribute, such as through financial donations, volunteering, or expertise. This will increase the chances of the business partnering with the club on a long-term basis.
3. **Measurable impact:** Focusing on one of the seven areas of focus allows the club to measure the impact of their service projects more accurately. They can track progress and demonstrate the outcomes of their efforts to the business. This will build trust and credibility and help to establish a strong partnership.
4. **Wider recognition:** When the club focuses on one of the seven areas of focus, it will be easier for them to be recognized by the wider community and other Rotary Clubs. This will help to establish the club as a leader in the area of focus and attract more volunteers and members.
5. **Greater effectiveness:** Focusing on one of the seven areas of focus allows the club to work more effectively with other organizations and stakeholders who share similar goals. They can collaborate with these organizations and leverage their resources to achieve greater impact in the community.

To synopsis, focusing on one of the seven areas of focus is essential for Rotary Clubs when approaching businesses for assistance with financial donations, volunteers, and membership. It provides a clear direction, better engagement, measurable impact, wider recognition, and greater effectiveness. The clubs should carefully choose the area of focus that aligns with their values and goals and work towards achieving significant outcomes in their communities.

Rotary International is dedicated to seven areas of focus to build international relationships, improve lives, and create a better world to support our peace efforts and end polio forever.



### 1. Basic Education & Literacy

More than 775 million people over the age of 15 are illiterate. Our goal is to strengthen the capacity of communities to support basic education and literacy, reduce gender disparity in education, and increase adult literacy.

### 2. Maternal & Child Health

Nearly 6 million children under the age of five die each year because of malnutrition, poor health care, and inadequate sanitation. We expand access to quality care, so mothers and their children can live and grow stronger.

### 3. Peace & Conflict Prevention/Resolution

Rotary encourages conversations to foster understanding within and across cultures. We train adults and young leaders to prevent and mediate conflict and help refugees who have fled dangerous areas.

### 4. Disease Prevention & Treatment

We educate and equip communities to stop the spread of life-threatening diseases like polio, HIV/AIDS, and malaria. We improve and expand access to low-cost and free health care in developing areas.

### 5. Water, Sanitation & Hygiene

We support local solutions to bring clean water, sanitation, and hygiene to more people every day. We don't just build wells and walk away. We share our expertise with community leaders and educators to make sure our projects succeed long-term.

### 6. Community & Economic Development

We carry out service projects that enhance economic and community development and create opportunities for decent and productive work for young and old. We also strengthen local entrepreneurs and community leaders, particularly women, in impoverished communities.

### 7. Support the Environment

Rotary's newest area of focus is the environment which will enable Rotarians and Rotary Clubs to bring about positive change in the world and increase our impact.



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## Risks of Not Picking a Focus Area in Business and Approaching with a Broad Approach

- **Lack of Clarity:** Without a clear focus area, it can be difficult to articulate your unique value proposition to potential clients or customers. This lack of clarity can also make it difficult for you to communicate the specific benefits of your services to potential clients, making it harder to win their business.
- **Difficulty in Targeting Customers:** When you have a broad approach, it can be challenging to target a specific audience with tailored messaging that resonates with their

needs and interests. As a result, your marketing efforts may not be as effective as they could be, and you may struggle to attract the right kind of customers.

- **Reduced Productivity:** Without a clear focus area, it can be challenging to stay focused and productive. You may find yourself constantly switching between different projects and tasks, which can lead to a lack of progress in any one area.
- **Lack of Expertise:** When you try to be all things to all people, you risk spreading yourself too thin. You may not have the deep expertise or specialized knowledge required to excel in any one area, making it harder for you to deliver exceptional results to your clients.
- **Increased Competition:** If you don't have a clear focus area, you'll be competing with a wider range of businesses for the same customers. This can make it harder to differentiate yourself and stand out from the competition.

In general, having a clear focus area is critical to success in business. By focusing on a specific area, you can develop deep expertise, tailor your messaging to a specific audience, and differentiate yourself from the competition. Without a clear focus area, you risk being too broad in your approach and may struggle to gain traction in the market.

### Key Takeaways and Steps to Deciding on a Focus Area

1. Identify the core values of your club and use them to develop a mission statement.
2. Brainstorm potential focus areas that align with your club's mission statement.
3. Conduct research on each potential focus area to evaluate its feasibility and potential impact.
4. Prioritize your list of potential focus areas based on feasibility, impact, and alignment with your club's mission statement.
5. Select a single focus area to pursue and develop a specific action plan for addressing it.
6. Continuously assess and adjust your focus area and action plan as needed based on feedback and results.

Picking a focus area is a critical step in developing a successful value proposition and partnership strategy. By following these steps, your club can select a focus area that aligns with your mission and values and has the potential to make a meaningful impact in your community.

Once a Rotary club has identified its focus area and developed a strong value proposition, the next step is to identify potential partners to collaborate with. Building partnerships can not only help advance Rotary's mission but also provide additional resources and expertise to achieve shared goals. In this section, we will explore the various ways Rotary club members can identify potential partners and ensure alignment with Rotary's mission and values. By following these steps, club members can successfully engage with potential partners and build meaningful relationships that benefit both parties.



## Identifying Value Proposition for Rotary club

Does your club have a Value Proposition?

If not, let's create one.

Steps to build a Value Proposition:

Skeleton:

**[Brand]** is the product of choice for **[target]** that **[point of differentiation/value]** because **[reason to believe]**

### Step1: Brand

The first step in building a value proposition for a Rotary club is to establish its brand. This involves identifying and determining the name of the club that the value proposition will be developed for. It is essential to have a clear understanding of the club's brand identity, including its values, mission, and purpose, as these will serve as the foundation for the value proposition.

### Step2: Determine Your Target Businesses

The first thing you need to do is decide which types of businesses you want to partner with. Think about businesses that have similar values to your Rotary Club, and that are interested in making a positive impact on the community. You might want to focus on businesses that are environmentally friendly, for example, or that support education or healthcare initiatives.

### Step3: Identify your Point of Differentiation/Value

Next, you need to think about what makes your Rotary Club special and different from other organizations. This could be something like the skills and expertise of your members, the passion and enthusiasm of your team, or the success of past projects. You want to highlight what makes your Rotary Club stand out and what you can offer that other organizations can't.

### Step4: Craft your Reason to Believe

Finally, you want to give some evidence or examples to back up your claim that your Rotary Club is unique and valuable. This could be things like success stories from past projects, testimonials from satisfied partners, or awards and recognition your club has received. By giving concrete examples, you can show potential partners that your Rotary Club is a reliable and effective partner.

Here's an example of how you might put all this together:

"Rotary Club is the perfect partner for environmentally friendly businesses that want to make a difference in the community. We have a team of passionate and dedicated members who are committed to creating a more sustainable future. We offer a unique set of skills and expertise that can help your business make a positive impact. For example, we have successfully launched a community recycling program that has reduced waste by 50%. We have also received recognition from the local government for our work in promoting sustainability. By partnering with us, you can be confident that you are working with a reliable and effective organization that is committed to making a difference."



## Potential Partners

### Personal Networks:

- Club members can compile a list of family, friends, and acquaintances who are business owners or have connections to businesses.
- They can reach out to these individuals and schedule a meeting or phone call to discuss potential partnership opportunities with Rotary.
- During the meeting or call, club members can explain the mission of Rotary and the benefits of partnering, as well as listen to the potential partner's needs and goals to ensure alignment.
- Club members should follow up with the potential partner after the meeting or call to continue building the relationship and exploring potential partnership opportunities.

### Club's Networks:

- Rotary clubs can create a list of businesses that they have partnered with previously.
- Club members can reach out to these businesses via email or phone to discuss potential partnership opportunities again, highlighting the success of the previous partnership.
- During the meeting or call, club members can explain the mission of Rotary and the benefits of partnering, as well as listen to the potential partner's needs and goals to ensure alignment.
- Club members should follow up with the potential partner after the meeting or call to continue building the relationship and exploring potential partnership opportunities.

### Local Businesses:

- Rotary clubs can create a list of local businesses in the community that align with Rotary's mission and values.
- Club members can reach out to these businesses via email or phone to introduce themselves and Rotary, and to schedule a meeting or call to discuss potential partnership opportunities.
- During the meeting or call, club members can explain the mission of Rotary and the benefits of partnering, as well as listen to the potential partner's needs and goals to ensure alignment.
- Club members should follow up with the potential partner after the meeting or call to continue building the relationship and exploring potential partnership opportunities.

### Identifying the Mission:

- Rotary members can attend events or functions where potential partners may be present, such as business networking events or community meetings.
- Club members can also ask other community organizations, such as the Chamber of Commerce or local government offices, for recommendations of potential partners that align with Rotary's mission and values.
- Rotary members can also conduct online research to learn more about potential partners, including reading news articles or reviews about the business and its mission.
- When meeting with potential partners, club members should ask open-ended questions to understand the business's mission and values, such as "What are your company's core values?" or "What inspired you to start this business?"

### Check for Alignment with Rotary:

- Once a list of potential partners has been compiled, Rotary members can review each business to ensure that it aligns with Rotary's mission and values.



- Club members can research the potential partner's history and reputation, such as their involvement in the community and previous charitable acts.
- Club members can also review the potential partner's website or marketing materials to ensure that their messaging aligns with Rotary's mission and values.
- During the initial meeting or call with a potential partner, club members should ask questions to assess alignment, such as "How does your business give back to the community?" or "What are your goals for partnering with Rotary?"
- Club members should also consider the potential partner's level of commitment to partnering with Rotary, such as their willingness to volunteer time or donate funds to Rotary projects.
- It can be helpful to assign a score or rating system to each potential partner to easily identify which businesses align best with Rotary's mission and values.

Overall, it's important for members to feel comfortable and supported in identifying potential partners and checking for alignment with Rotary. All the members together can provide resources and guidance, such as sample questions or a template for reviewing potential partners, to help new members navigate this process. Additionally, offering training or workshops on partnership development and alignment can help all members feel confident in identifying and engaging potential partners.

The exhaustive list of contacts can be something as simple as below:

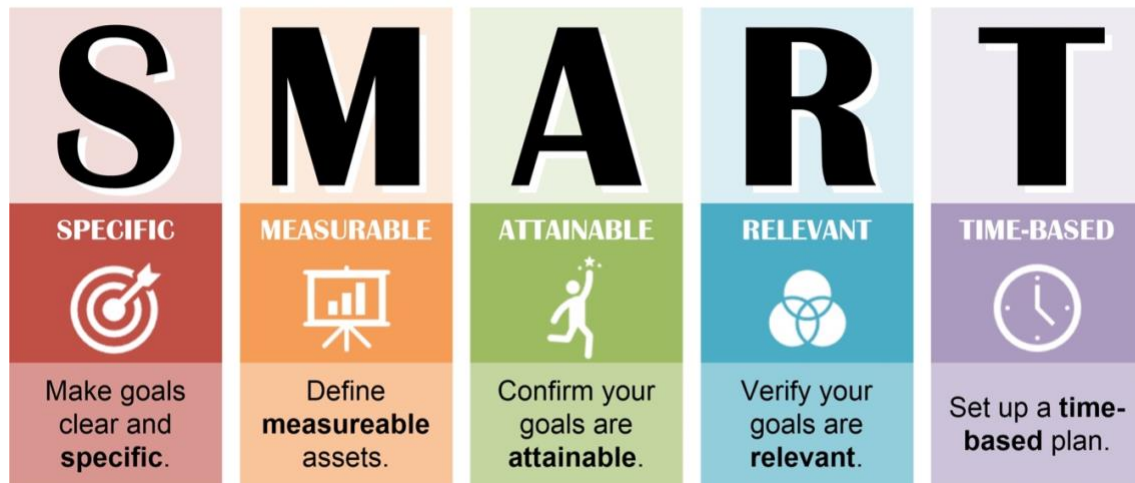
Name of Business	Phone	Email	Point of Contact at Business	Point of Contact at Rotary	Mission	Alignment

## S.M.A.R.T. Framework: The Key to Crafting Measurable Goals

### S.M.A.R.T

The graphic below breaks down the essential themes of each letter in the acronym that will allow you to turn broad goals into smaller actionable steps when approaching potential partner businesses. Using this framework and applying it to an accomplishable Goal, Objective and Strategy will allow you to pitch ideas in a simple manner while keeping the experience of your project at a high level.

Next you will craft a goal while keeping the S.M.A.R.T. framework in mind.



## Goals

A club setting goals S.M.A.R.T. framework serves as the best tool to adapt broad-goals into smaller achievable tasks. This will allow you to see the logical flow of your specific, measurable, attainable, relevant and time-based performance measures. The goal example using today will pertain to an environmental goal as we saw in the case study.

Goals need to follow the S.M.A.R.T. framework when being written so we able to obtain objectives from the main goal.

### Goal Example:

"Our goal is to contribute to a more sustainable and resilient local environment in Tucson, Arizona, by implementing targeted initiatives and engaging our community in environmental conservation and protection."

### Skeleton:

"Our goal is to (increase/improve/expand) (specific metric) in Tucson, Arizona by (specific percentage or numerical target) through (specific initiative or action) within (specific timeframe), while engaging (specific target audience) in (identified focus), and (measuring/evaluating) our impact using (specific metric or tool)."

### Objective:

These objectives will help you focus your efforts, measure your success, and track your progress towards your goal.

### Objective (SMART):

- Specific: "By the end of this year, we will organize at least two clean-up events in Tucson's public parks and natural areas."



- **Measurable:** We will track the number of participants, the amount of litter collected, and the feedback from the community and stakeholders.
- **Attainable:** We will partner with local environmental organizations and leverage our club's volunteers, resources, and networks to organize the events.
- **Realistic:** The events align with our club's focus and values, and respond to the community's demand for clean and safe public spaces.
- **Time-bound:** The events will be completed by December 31st of this year.

As you can see this objective follows the S.M.A.R.T. model and allows the you to take a broad goal and break it down into smaller actionable steps.

### Now build an Objective

Objective: \_\_\_\_\_

Specific: By \_\_\_\_\_ (*date or time frame*), we will \_\_\_\_\_ (*specific and clear action*).

Measurable: We will track progress by measuring \_\_\_\_\_ (*specific metric*) and aim to achieve \_\_\_\_\_ (*quantifiable target*).

Attainable: We will accomplish this objective by \_\_\_\_\_ (*specific resources, capabilities, or support*).

Realistic: The objective aligns with our \_\_\_\_\_ (*values, priorities, or goals*) and is feasible given our current \_\_\_\_\_ (*circumstances or limitations*).

Time-bound: We will complete this objective by \_\_\_\_\_ (*specific deadline or timeline*).

Using this template, you can plug in the relevant information to create a SMART objective that is tailored to your specific goals and needs.

### Alignment

Alignment is a critical aspect of successful partnerships between Rotary clubs and businesses. This section will explore the importance of alignment, both in terms of the businesses' values and mission and in cases where there may not be a perfect match.

- **Alignment with Business Values and Mission:**
  - a. When identifying potential partners, Rotary clubs must take into consideration the values and mission of the business. It is important to ensure that the potential partner's values and mission align with Rotary's goals and mission. A misalignment of values and mission can lead to misunderstandings, conflicts, and ultimately, unsuccessful partnerships.
  - b. If a business's values and mission are in line with Rotary's goals and mission, there is a greater likelihood of a successful partnership. Both parties will be motivated and

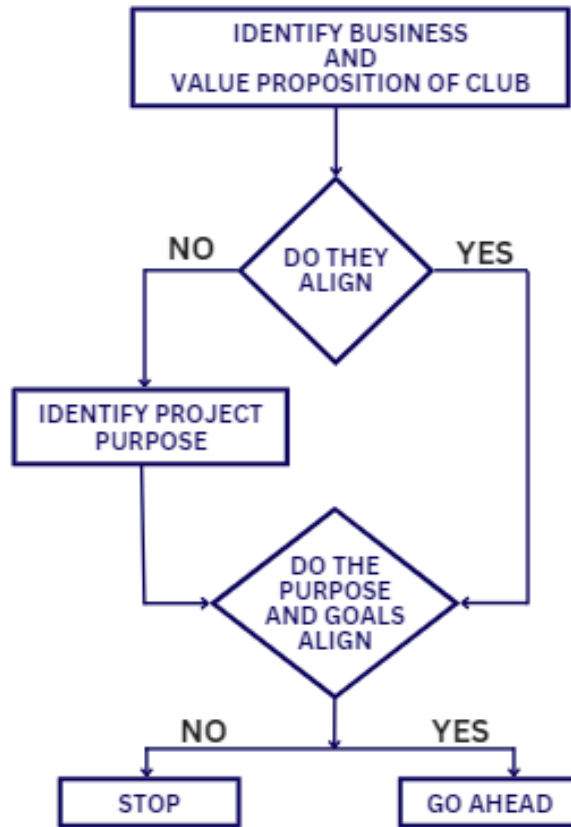
committed to the partnership, and it will be easier to achieve mutually beneficial outcomes.

- **Alignment with Project Purpose:**

- a. In some cases, a business's values and mission may not align perfectly with Rotary's goals and mission, but the purpose of the project may still align with both parties. In such cases, it is important to weigh the benefits of partnering against the potential risks.
- b. If the project aligns with the purpose of both parties, even if their values and mission are not identical, there may still be opportunities for successful collaboration. However, it is crucial to communicate clearly and openly about any potential areas of misalignment and find ways to address them.

In conclusion, alignment is a critical component of successful partnerships between Rotary clubs and businesses. It is important to consider the alignment of both values and mission, as well as the alignment of the project purpose. By finding partners who share similar values and mission, and who align with the project purpose, Rotary clubs can increase the likelihood of successful partnerships and achieve mutually beneficial outcomes.

The following flowchart provides a clear and concise visual representation of the alignment process for Rotary clubs and potential partners.



### Communicate with potential business:

To ensure effective communication with potential partners (not personal contacts), we encourage all Rotary clubs to follow the provided prompts for emailing and cold calling businesses. By following these prompts, you can communicate your established focus and value proposition, as well as specify the expected support based on the target business you are reaching out to. This will help you to create mutually beneficial relationships and make a positive impact in our community. Please find below the email and cold calling prompts to use when contacting local businesses for partnership opportunities.

#### For Emailing:

**To:** \_\_\_(Email Address of the business contact)\_\_\_ [If needed you can also add your co-chairperson here }

**CC:** \_\_\_(Include the member relevant to your club: President/Director)\_\_\_

**Subject:** Invitation to Discuss Partnership Opportunities with Rotary Club of \_\_\_\_\_ .

#### Email Content:



Dear \_\_\_\_\_,

My name is \_\_\_\_(First Name)\_\_\_\_ and I am a member of Rotary club of \_\_\_\_(club/city/town name)\_\_\_\_. Our organization aims to make a positive impact in our community through various initiatives and projects \_\_\_\_(Add in your goal as well)\_\_\_\_. We are currently seeking partnerships with local businesses like yours to support our efforts and create mutually beneficial relationships.

*We are interested in your potential support in the following areas:*

- 1. Financial assistance/grants/in-kind services*
- 2. Volunteers to assist with projects*
- 3. Business/Corporate membership in Rotary*

As a respected local business, we believe that your involvement in our organization could be valuable to both parties. We would greatly appreciate the opportunity to schedule a brief virtual meeting with you to discuss this further.

If you are available, we would love to schedule a virtual/in-person meeting. Could you please share your availability with us by \_\_\_\_(Date preferably 5-6 days from the day of the email date)\_\_\_\_? We will work with your schedule to find a time that works best for you.

Thank you for considering this request. We look forward to the opportunity to explore a potential partnership.

Best Regards,

\_\_\_\_\_ *(Signature: Full Name, Position in the organization, Contact Number and Email ID)*

***In the above prompt replace the highlighted portion with your established focus and value proposition and specify the expected support based on the target business you are reaching out to.***

**Cold Calling businesses Prompt:**

Hello, my name is \_\_\_\_\_ and I am a member of the Rotary Club of \_\_\_\_(city/town name)\_\_\_\_. We are reaching out to local businesses to explore potential partnerships that can benefit both the business and our community. Would it be possible to speak with someone in your leadership team \_\_\_\_(or the owner, if it's a small business)\_\_\_\_ for a brief conversation about how we can work together to make a positive impact in our community?

*In case of a personal network-based contact, we suggest the specific member reaches out to point of contact and alters the above prompt based on the relation of the person with the business and the club needs.*



### Strategy: Putting the Goal and Objectives to Action

Think about the different stages your potential partner might go through before they engage with Rotary services:

1. Stage 1: When someone hears about Rotary services for the first time
2. Stage 2: When they start to think about whether they want to get involved
3. Stage 3: When they decide to engage with Rotary services.

To effectively create awareness about Rotary services during Stage 1, the following steps can be taken:

1. Define your target audience: Who are you trying to reach with your Rotary services? What are their needs and interests?
2. Awareness stage: Develop strategies to create recognition for your Rotary club's brand. This can include content marketing, public relations, and event marketing.

To help people decide whether they want to get involved, Rotary clubs can provide information about the different service projects they're involved in, the impact they're making in the community, and the opportunities for personal and professional development that Rotary membership offers.

To encourage people to actually engage with Rotary services, clubs might offer a free trial membership, invite people to attend a meeting or service project, or offer special promotions for new members.

After the club has done all these things, they can evaluate the success of their marketing efforts and see if there are any ways to improve their outreach to the community.

In summary, this marketing plan offers Rotary clubs a comprehensive approach to forming strong partnerships and achieving their goals. By focusing on one of the seven areas of service, clubs can provide a clear direction, engage partners more effectively, measure their impact, gain wider recognition, and increase their effectiveness. Through identifying potential partners, crafting a unique value proposition, and using the S.M.A.R.T. framework to create measurable goals, Rotary clubs can streamline their efforts and achieve significant outcomes in their communities. This plan equips clubs with the tools and strategies needed to form successful partnerships and make a lasting impact on the world.





# Case Study

## Focus Areas: The First Step

Picking a focus area is a crucial step for any club looking to make a meaningful impact in their community. Without a clear focus, a club can easily become scattered and struggle to make a real difference. That's why it's essential to identify a focus area that aligns with the club's core values and mission while also having the potential to make a positive impact. In this context, we'll take a look at how the Eller Verde Rotary Club identified their focus area, the importance of core values and mission statements, and the steps they took to develop a specific action plan to make a positive impact on the environment through reducing plastic waste. By following these steps, any club can identify a focus area that aligns with their values and mission, differentiate themselves from the competition, and make a meaningful impact in their community.

### Step 1: Identify the Core Values of the Club

The Rotary Club identifies its core values as community service, environmental sustainability, and ethical leadership.

### Step 2: Develop a Mission Statement

Using these core values, the club develops a mission statement that reads, "Our mission is to promote sustainable practices that protect and preserve the environment while serving our community with ethical leadership."

### Step 3: Brainstorm Potential Focus Areas

Based on the club's mission statement, they brainstorm potential focus areas, such as reducing plastic waste, promoting renewable energy, and protecting natural habitats.

### Step 4: Conduct Research on Each Potential Focus Area

The club then conducts research on each potential focus area to evaluate their feasibility and potential impact. They find that reducing plastic waste is a feasible and impactful focus area that aligns with their mission statement.

### Step 5: Prioritize Potential Focus Areas

The club prioritizes their potential focus areas based on feasibility, impact, and alignment with their mission statement. They determine that reducing plastic waste is the most feasible and impactful focus area that aligns with their mission statement.



### Step 6: Select a Focus Area and Develop an Action Plan

The Rotary Club decides to focus on reducing plastic waste and develops a specific action plan for addressing it. They plan to organize a community-wide recycling program, partner with local businesses to reduce single-use plastics, and educate the community on the importance of reducing plastic waste.

### Step 7: Continuously Assess and Adjust the Focus Area and Action Plan

The club continuously assesses and adjusts their focus area and action plan based on feedback and results. They track the progress of their recycling program, gather feedback from local businesses and community members, and adjust their approach as needed to achieve their goals.

By following these steps, the Eller Verde Rotary Club was able to identify a focus area that aligned with their mission and values while also having the potential to make a meaningful impact in their community. With a clear focus on reducing plastic waste, the club can develop deep expertise, tailor their messaging to a specific audience, and differentiate themselves from the competition while also making a positive impact on the environment.

## Value Proposition

Now that the club has identified its focus area and developed an action plan, they can use this information to create a compelling value proposition that speaks to their unique strengths and differentiation. A value proposition is a statement that communicates the unique value that an organization provides to its target audience. By focusing on reducing plastic waste and promoting environmental sustainability, the Eller Verde Rotary Club can differentiate itself from other organizations and create a compelling value proposition that resonates with their target audience. Their value proposition could focus on their expertise in environmental sustainability, their commitment to ethical leadership, and their ability to drive meaningful change in their community. With a clear focus and a well-defined value proposition, the Eller Verde Club can attract new members, build partnerships with local businesses, and make a positive impact on the environment.

To create a value proposition for the Eller Verde Club, follow these steps:

[**Brand**] is the product of choice for [**target**] that [**point of differentiation/value**] because [**reason to believe**]

**Brand:** Eller Verde Club



**Target:** Environmentally conscious businesses

**Point of differentiation/value:** Meaningful opportunities to make a difference through service projects and education

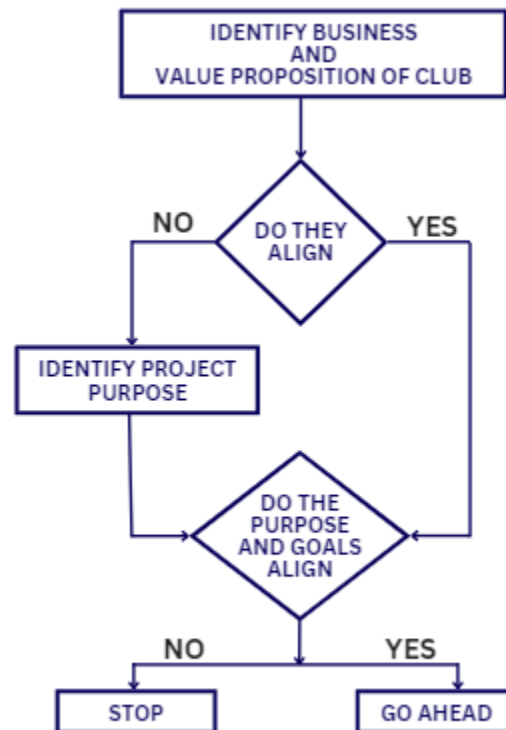
**Reason to believe:** Leveraging our global network of members and partnerships with experts in the field

"The **Eller Verde Club** partners with businesses that are **passionate about environmental causes**, offering opportunities to make a difference through **meaningful and effective service projects and education**, leveraging our **global and local network of members and partnerships with experts in the field.**"

### Table without Alignment

The list below provides a comprehensive record of the businesses that Eller Verde club has reached out to. They document the details of each business they contact for future reference or upcoming projects. At this stage, they have not yet added a column to the table to evaluate alignment with these businesses.

Name of Business	Phone	Email	POC at Business	POC at Rotary	Mission
A	+1 (123) 456-7890	a@uoa.com	Sanchit A.	Alexis S.	Water & Energy
B	+1 (234) 456-7890	b@eller.com	Unnati P.	Don J.	Culture & Community
C	+1 (123) 456-7890	c@tucson.com	Pallavi M.	Anita M.	Health and Education



## Identify potential projects

**Project Purpose:** The goal of this project is to develop a sustainable transportation network in Tucson, Arizona, that promotes active transportation modes, such as biking and walking, while reducing reliance on personal vehicles. The project aims to improve access to public transportation, reduce traffic congestion, and improve air quality in the city.

## Identify goals

Our goal is to increase the number of bike racks in the downtown area of Tucson, Arizona by 50% by the end of 2023, contributing to the promotion of active transportation and reducing the reliance on personal vehicles for short distance trips. We aim to engage local businesses and residents in our efforts to promote sustainable transportation options, while measuring our impact using the number of installed bike racks in the downtown area.

## Identify objective

**Specific:** Increase the number of bike racks in the downtown area of Tucson, Arizona.

**Measurable:** Increase the number of bike racks by 50% from the current number by the end of 2023.



**Achievable:** Work with the city officials to identify suitable locations for the installation of new bike racks and collaborate with local businesses and organizations to secure funding for the new bike racks.

**Relevant:** The increase in the number of bike racks will promote active transportation modes such as biking and walking, reduce the reliance on personal vehicles for short distance trips, and contribute to improving air quality in the city.

**Time-bound:** Complete the installation of new bike racks and achieve the 50% increase by the end of 2023.

### Table with Alignment and plot using flowchart

As discussed earlier, to ensure alignment with the goals, objectives, mission, and values of both the businesses and the club for a particular project, a new column has been added to the list. The club will record whether or not they are in alignment with the business for that project based on the following flowchart.

Name of Business	Phone	Email	POC at Business	POC at Rotary	Mission	Alignment
A	+1 (123) 456-7890	a@uoa.com	Sanchit A.	Alexis S.	Water & Energy	YES
B	+1 (234) 457-7890	b@eller.com	Unnati P.	Don J.	Culture & Community	YES
C	+1 (123) 458-7890	c@tucson.com	Pallavi M.	Anita M.	Health and Education	NO

### Communication

Cold calling and emailing are two commonly used methods for businesses to reach out to potential partners or customers who aren't personal contacts from the club. In this section, we will provide examples of cold calling and emailing that three different members of the Eller Verde Club use to reach out to businesses to explore potential partnerships. Each example includes a script for a cold call and an email template that Eller Verde Club members use to initiate a conversation about potential partnership opportunities. The email includes a brief introduction to the organization and the reason for reaching out, followed by a request to schedule a virtual meeting to discuss partnership opportunities further. Also, you will notice as we are reaching out for a general purpose all the emails are having a common flow but as you reach out to different businesses it would be imperative to make sure you cater the email or your introduction in order to attract their attention to the common factors the club and the business can provide



## Business A-

### Cold Calls:

Hello, my name is **Alexis** and I am a member of the **Eller Verde Club**. We are reaching out to various businesses to explore potential partnerships that can benefit both the business and our community. Would it be possible to speak with someone in your leadership team for a brief conversation about how we can work together to make a positive impact in our community?

### Email:

**To:** a@uoa.com

**CC:** [abhishek@ellerverde.com](mailto:abhishek@ellerverde.com), [ananoti@ellerverde.com](mailto:ananoti@ellerverde.com) (Include the member relevant to your club)

**Subject:** Invitation to Discuss Partnership Opportunities with Eller Verde Club

**Date:** April 22<sup>nd</sup>, 2023(Added to give a reference of time flexibility provided)

### Email Content:

Dear **Sanchit**,

My name is **Alexis** and I am a member of **Eller Verde Club**. Our organization aims to make a positive impact in our community **by increasing access to food, promoting environmental sustainability, and educating the community on environmental issues**. We seek to partner with businesses that value keeping our community safe and clean and share our mission.

We are currently seeking partnerships with local businesses like yours to support our efforts and create mutually beneficial relationships. We are interested in your potential support in the following areas:

1. Financial assistance/grants/in-kind services
2. Volunteers to assist with projects
3. Business/Corporate membership in Rotary

As a business that values environmental water and energy conservation, we believe that your involvement in our organization could be valuable to both parties. We would greatly appreciate the opportunity to schedule a brief virtual meeting with you to discuss this further.

If you are available, we would love to schedule a virtual/in-person meeting. Could you please share your availability with us by **Wednesday, April 26, 2023**? We will work with your schedule to find a time that works best for you.

Thank you for considering this request. We look forward to the opportunity to explore a potential partnership that can make a positive impact in our community.

Best Regards,

Alexis S

Eller Verde Club

Chairperson of \_\_\_\_\_ 2022-23

(+1 (520)867-4567)



## Business B-

### Cold Calls:

Hello, my name is **Don** and I am a member of the **Eller Verde Club**. We are reaching out to various businesses to explore potential partnerships that can benefit both the business and our community. Would it be possible to speak with someone in your leadership team for a brief conversation about how we can work together to make a positive impact in our community?

### Email:

**To:** b@eller.com

**CC:** [abhishek@ellerverde.com](mailto:abhishek@ellerverde.com), [ananoti@ellerverde.com](mailto:ananoti@ellerverde.com) (Include the member relevant to your club)

**Subject:** Invitation to Discuss Partnership Opportunities with Eller Verde Club

**Date:** April 22<sup>nd</sup>, 2023(Added to give a reference of time flexibility provided)

### Email Content:

Dear **Unnati**,

My name is **Don** and I am a member of **Eller Verde Club**. Our organization aims to make a positive impact in our community **by increasing access to food, promoting environmental sustainability, and educating the community on environmental issues**. We seek to partner with businesses that value keeping our community safe and clean and share our mission.

We are currently seeking partnerships with local businesses like yours to support our efforts and create mutually beneficial relationships. We are interested in your potential support in the following areas:

1. Financial assistance/grants/in-kind services
2. Volunteers to assist with projects
3. Business/Corporate membership in Rotary

As a business that values environmental water and energy conservation, we believe that your involvement in our organization could be valuable to both parties. We would greatly appreciate the opportunity to schedule a brief virtual meeting with you to discuss this further.

If you are available, we would love to schedule a virtual/in-person meeting. Could you please share your availability with us by **Wednesday, April 26, 2023**? We will work with your schedule to find a time that works best for you.

Thank you for considering this request. We look forward to the opportunity to explore a potential partnership that can make a positive impact in our community.

Best Regards,

Don J

Governor-elect, Rotary District 5500

Volunteer Ambassador, ShelterBox USA

(+1 (520) 906-9148)



## Business C-

### Cold Calls:

Hello, my name is **Anita** and I am a member of the **Eller Verde Club**. We are reaching out to various businesses to explore potential partnerships that can benefit both the business and our community. Would it be possible to speak with someone in your leadership team for a brief conversation about how we can work together to make a positive impact in our community?

### Email:

To: c@uoa.com

CC: [abhishek@ellerverde.com](mailto:abhishek@ellerverde.com), [ananoti@ellerverde.com](mailto:ananoti@ellerverde.com) (Include the member relevant to your club)

**Subject:** Invitation to Discuss Partnership Opportunities with Eller Verde Club

**Date:** April 22<sup>nd</sup>, 2023(Added to give a reference of time flexibility provided)

### Email Content:

Dear **Pallavi**,

My name is **Anita** and I am a member of **Eller Verde Club**. Our organization aims to make a positive impact in our community **by increasing access to food, promoting environmental sustainability, and educating the community on environmental issues**. We seek to partner with businesses that value keeping our community safe and clean and share our mission.

We are currently seeking partnerships with local businesses like yours to support our efforts and create mutually beneficial relationships. We are interested in your potential support in the following areas:

1. Financial assistance/grants/in-kind services
2. Volunteers to assist with projects
3. Business/Corporate membership in Rotary

As a business that values environmental water and energy conservation, we believe that your involvement in our organization could be valuable to both parties. We would greatly appreciate the opportunity to schedule a brief virtual meeting with you to discuss this further.

If you are available, we would love to schedule a virtual/in-person meeting. Could you please share your availability with us by **Wednesday, April 26, 2023**? We will work with your schedule to find a time that works best for you.

Thank you for considering this request. We look forward to the opportunity to explore a potential partnership that can make a positive impact in our community.

Best Regards,  
Anita M.





District Governor, Rotary District 5500  
Email: [anitamcd@rotaryd5500.org](mailto:anitamcd@rotaryd5500.org)  
Phone: 520-271-7207

Assumption: For the above section, all three examples are shown for non-personal contacts of a club.

## Strategy

### Stage 1: Awareness

Define the target audience: Identify individuals and groups who are interested in active transportation modes, such as biking and walking, and are passionate about reducing the reliance on personal vehicles.

The following segments could be targeted for this use case:

#### Demographic Segmentation:

Age: 18-55 years old

Gender: Male and Female

Education: High school graduates, some college or college graduates

Occupation: Students, professionals, and those who work in downtown Tucson

#### Psychographic Segmentation:

Lifestyle: Active and health-conscious

Attitudes: Concerned about the environment and the impact of personal vehicles on the community

Interests: Outdoor activities such as cycling, running, and walking, sustainability, and community involvement

#### Behavioral Segmentation:

Benefits sought: Convenient and cost-effective transportation options, improved air quality, reduced traffic congestion, and increased physical activity

Usage rate: Regular users of personal vehicles for short distance trips (e.g., less than 5 miles) who are open to alternative transportation options

Develop strategies to create brand recognition: Create a brand identity for the project that reflects its goals and purpose. This can include developing a logo, tagline, and brand messaging. Use content marketing, public relations, and event marketing to create awareness about the project and its benefits.

### Stage 2: Interest



Provide information about the project: Provide information about the benefits of biking and walking and how they contribute to a sustainable transportation network. Highlight the positive impact the project will have on the community, such as reduced traffic congestion and improved air quality.

Highlight opportunities for involvement: Share information about how individuals can get involved in the project, including volunteering, donating, or advocating for the cause.

### **Stage 3: Engagement**

Offer incentives for engagement: Offer incentives to encourage people to engage with the project, such as a free bike rack installation or a discount on bike accessories.

Provide opportunities for engagement: Invite people to attend community meetings or events where they can learn more about the project and offer their input.

Evaluate and improve outreach: To evaluate the success of the marketing efforts for the sustainable transportation project in Tucson, Arizona, several metrics should be tracked, including the number of bike racks installed, the frequency of use of public transportation, and the reduction in personal vehicle usage. Feedback can be collected through surveys and community engagement events to gather opinions and suggestions from community members. The collected data can then be analyzed to determine if the project is achieving its goals and if there are any areas that require improvement. Additionally, regular progress reports should be shared with stakeholders and project partners to ensure transparency and accountability.