

# SECTION 4

## MAKING IT HAPPEN – IMPLEMENTING YOUR PLANS



4

# 4.13

## PUTTING IT IN WRITING

### CHAPTER OVERVIEW

In this short chapter we start pulling together all the work you've done to date, and begin preparing your strategic plan. We discuss the importance of putting it in writing, and the most useful format — will you need a detailed business plan or a fairly short, simple marketing plan?

### HOW MANY PLANS? WHAT KIND?

In some cases, businesses or individuals prepare a series of plans: a business plan, a marketing plan, even specific plans for each aspect of their work.

For example, a large museum or public gallery might prepare a plan for their education services, one for their food outlets and the souvenir shop, another for the volunteers and friends group, and a plan for the management and marketing of the core collection, as well as separate plans for each blockbuster exhibition planned for the year.

For small organisations and individuals one plan is usually sufficient, and it generally includes business and marketing. Although this guide isn't designed to help you with major financial and accounting projections, we do recommend that you seek out advice, and get professional assistance with your finance decisions.

You will need advice about your tax, your expenditures on equipment, raw materials, uniforms, costumes, and a range of things called 'tools of the trade'. If you are working from home you'll need to know about the types of deductions you can make for electricity, rent, telephone and other utilities, and depreciation on desks, chairs, cupboards and other furniture used for work.

The rules and regulations, and the way in which they are interpreted, can change, so it's worth getting professional help. Your financial adviser can also help you set up your files and accounts. You need to know what you need receipts for, and how to keep track of expenses and income.

You now have enough information to prepare about half your marketing plan. You've got the background information, and you've established your mission and vision and your goals. Now you need some action plans to achieve those goals and objectives. Your business plan will help you focus your thinking. And, of course, there's no limit to what you can plan!

## life scenes

*Double T's—The Entertainment Company is an organisation that exports Australian talent to overseas venues. Kevin Kosky and his wife Christine described their work to Smarts as 'a computer based business, promoting heavily on the Internet'. The business was originally created in 1989 because the couple (an acoustic guitar and vocal duo) had an overload of work. They began hiring other duos and bands, and eventually ended up as an entertainment agency supplying acts for cruise ships, nightclubs and resorts.*

*Making full use of the Internet to access international markets they have substantially increased the size of their business. In 1996 they joined the Victorian Professional Entertainers Agents Association (VPEAA) which has enhanced their overseas credibility and also enabled them to network and 'compare and maintain' their business practices.*

*Currently Double T's turnover is about \$450,000 per year. 'Our vision for the next few years will take us to a much higher turnover and we have only just laid the foundations for a much larger business. We are beginning phase two of our business plan, taking us from supplying cover bands and piano bar entertainers, into the realm of touring name acts worldwide.'<sup>23</sup>*

### WHY PUT IT IN WRITING?

It is important to start putting the plan in writing now. Why? Because putting it in writing is a good way to organise your thoughts and prepare yourself to make a commitment.

It is also useful when you have to involve other people. If an arts organisation produces a marketing plan it means that everyone involved with it has a clear understanding of the mission, goals, target audiences, objectives and activities that are planned.

A written marketing plan will also assist you when you approach arts organisations, accreditation bodies, funding authorities and potential sponsors. The development of a formal written plan, which uses correct terminology and indicates that a degree of thought and planning has gone into the enterprise, signals to others that you 'mean business' and should be taken seriously.

Many funding organisations will not accept applications unless the organisation can supply evidence that they have given thought to their planning, development and financial position, and that, if granted funding, they will ensure the money is spent wisely and effectively.

<sup>23</sup> 'Phase two — the world', *Smarts*, No. 13, March 1998, p. 31.

## life scenes

*Aeon design studio (the five artists from Western Australia who set up the co-operative studio mentioned in Chapter 12, Assessing Your Resources and Your Ideas) has learned the importance of research and planning, and of putting ideas in writing.*

*You'll recall the shared vision of the five artists was to become 'recognised within the Australian fine craft industry for quality, original products and competitive design services and to become financially self-sufficient within five years'.*

*They have produced a comprehensive business plan, which was instrumental in their successful application for a loan from Arts Venue Capital to produce initial stock for each of their product ranges. The business plan also helped them prioritise and focus their time and resources. One result is that they now use the services of wholesale agents to place their work in galleries.*

*Although they began with limited start-up capital, and they are still supplementing their incomes with various other employment, they are on target to meet their goal of self-sufficiency within 3–5 years. The challenge they now face is to streamline their processes and work effectively so that they still have time to explore non-commercial artistic endeavours.<sup>24</sup>*

Putting your plans in writing will also help you define precisely what your present plans, visions and dreams are, and the goals you want to set. However, there's one thing to keep in mind. You are putting them in writing. You are not carving them in stone, or taking a blood oath. Your business plan represents your thinking at this particular time, and in these particular circumstances. These can change. And if they do, then you might end up changing your marketing or business plan.

A serious accident or a lottery win may not change your dreams, visions or goals, but they could substantially change the resources, time or finances you can devote to achieving your goals.

## life scenes

*Lyn was 41 and finally feeling 'in control' of everything when she made a commitment to 'be serious' about writing. After years of finding scraps of time between work on the family farm, raising kids, being involved in rural community activities and struggling with unpredictable farm income, she had finally achieved her goal of being able to devote regular, fixed time to writing.*

*With a supportive partner she prepared a schedule and a plan, set up a dedicated work space, upgraded the computer and took a community education class on word processing. After attending numerous writers' workshops and avidly soaking up lectures and programs during writers' festivals she had selected her project — historical novels set in the*

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<sup>24</sup> 'Aeon's a goer', *Smarts*, No. 13, March 1998, p. 29–30.

continued

Australian bush between the first and second world wars — and had begun her research, networking through the Internet with libraries around the country.

'You can't imagine how it felt when the doctor confirmed I was pregnant. I mean, it was great in a way, but in another way, well, it was so totally unplanned! At first I thought, 'Well, that's that, then. No writing career for me'. But then I thought, well, nothing much will happen for the next few months (other than morning sickness, memory loss and an uncontrollable urge to clean the office!) so I might as well keep at it. And when the baby comes, we'll just see how it goes.'

Today Ben is a toddler and Lyn is finishing off the second draft of her novel. 'It didn't quite turn out the way I'd planned, but having the plan in place allowed me to focus on what really counted, and it made me think I didn't have to give up all my ideas. Timeframes may change, but the goal is still reachable, and Ben's a gift I wouldn't trade for a Booker Prize — well, most of the time!'

## consider this

It's time to gather together the work you've been doing so you can decide what you need to do and create your plan.

Go back through the Guide and collect the information you need. It might be a good idea to photocopy the relevant pages so you have them all together and can access them easily.

You'll need the following:

- Chapter 5 — your **Consider this** competition analysis (pp 46–49)
  - Worksheet No. 1: Defining Your Art (pp 60–61)
- Chapter 7 — Worksheet No. 2: Summary of SWOT Analysis (p. 72) (be sure to go over all the **Consider this** exercises you completed in Chapter 5 to ensure you haven't forgotten anything)
- Chapter 8 — your **Consider this** mission statement or vision statement exercise (p. 77)
  - your **Consider this** goals and objectives exercise (p. 79)
- Chapter 9 — Worksheet No. 3: Understanding Your Market (pp 85–86)



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*Chapter 10 — Worksheet No. 4: Analysing Your Product (pp 95–96)*

*— Worksheet No. 5: Cash Flow Forecast for One Year (pp 106–107)*

*— your Consider this comments for product, price, place, positioning (p. 110) and people skills (p. 111)*

*Chapter 11 — Worksheet No. 6: Promotions Plan (p. 126)*

*Chapter 12 — your Consider this support networks and equipment lists (p. 133 and p. 135 respectively)*

*Take time to review these lists, as they will help you decide on your action plan — which we'll cover in Chapter 14, Your Action Plan.*

## **KEY POINTS TO REMEMBER**

- While larger organisation may develop a series of plans (a business plan, a marketing plan, even specific plans for each program or exhibition), smaller organisation and individuals usually only need one plan which covers both business and marketing.
- It is important to put your plan in writing as a way of organising your thoughts, achieving group consensus and indicating to others (banks, funding bodies, potential sponsors) that you have a businesslike approach to your work. Having a plan also helps you to define precisely what your visions and dreams are, and how to set goals.
- Although a written plan will act as a sound guide to the future, it should not be rigid. If circumstances change, it is appropriate to revise the plan and make necessary adjustments.

## YOUR ACTION PLAN

### CHAPTER OVERVIEW

In this chapter you will develop your action plan — the things you hope to achieve within the short term, and also set some long term directions. In order to do this we look at some recommended ways to set goals and objectives, define broad areas for you to consider and show you how to set priorities in terms of the money available.

### WHAT IS AN ACTION PLAN?

The action plan is, in many ways, the real heart of your planning. It translates theory into action. Having assessed your situation and set your goals you now need to set specific objectives which are genuinely achievable. That means setting up a schedule of what you want to do, when and how. To make sure it is achievable you have to consider the time required, the resources you'll need, the money you have to spend and the priorities you'll set yourself.

An action plan is your 'to do' list.

### SETTING GOALS AND DEFINING OBJECTIVES

Although you can set any targets you like, these are some suggestions which might be of interest. Refer also to Chapter 4, *The Why? – The Benefits of Planning*.

- Don't be too easy on yourself. Setting goals that are easy to achieve won't give you a strong sense of accomplishment. If you have performed on stage, then setting a simple goal ('I'd like to act in a play') won't present much of a challenge.  
It would be better to consider the type of play, or the type of part, or an increased number of performances or parts. For example, 'I'd like to have a major role in a play', 'I'd like to perform in a musical comedy', 'I'd like one minor role in a Adelaide city production and one major role in a community production'.
- Divide major tasks into achievable elements. If your goal is to win the Archibald Prize that could be a fairly daunting undertaking. It would be wise to divide this goal into tasks which can be addressed – and achieved – in stages. For example: decide on a subject; approach subject for approval; set timetable for sittings to ensure work is completed on time; organise location, setting, venue; get competition information; prepare rough sketches; prepare painting; organise entry; prepare shipping, insurance, etc.; send entry to competition; prepare acceptance speech.

- Allow yourself an opportunity to start. Sometimes people set goals which are inherently inhibiting. If the goal is to create a prize winning piece of pottery, that might be both a motivator and an inhibitor. You may spend endless time making sketches, changing your mind about materials, shapes and sizes. Each time you start to work the fact that you have committed yourself to creating a prize winner may cause doubt, concern or stress. So, rather than fail, you come up with reasons not to start.

A better option may be to set a goal of creating several new works during the year with the aim of entering the best into competition or exhibition. That way the pressure is still on to create good work, but the schedule permits more flexibility.

## THE COMPONENTS OF YOUR ACTION PLAN

Your action plan will include activities to address both your long-term and your short-term objectives.

Here are some guidelines which can be used to help you determine your action plan:

Year One (Starting out):

- **Set your success targets.**
  - How much do you want to earn?
  - What are your goals in terms of performances, sales of items, awards, etc?
  - What time will you devote to performing and the other activities you want to undertake; teaching, studying, etc?)
  - What are your personal, lifestyle goals?
- **Build awareness of your products/work/performances.**

Prepare a list of options, such as exhibitions, classes, shows, publicity, interviews, performances and recordings. Make a reasonably long list at this stage – you can cut back later as you evaluate your workload.
- **Develop appropriate location distribution strategies.**

Where do you want to make your products available? Prepare a list – major theatres (list cities, theatres, etc.), types of galleries or shops, and so on. You can refer back to your notes from Chapter 10, under the heading 'Place', page 108.
- **Develop markets.**

Look around at the local scene: what can you do to create awareness and make an impact? Reviewing your notes in Chapter 5, Understanding the World Around You, and Chapter 9, Filling in Your Information Gaps, on your products and your markets, make a list of the things you could do to: (1) increase the amount of sales you make to existing customers, and (2) develop new audiences and customers.
- **Build contacts and networks.**

Review your support networks (as defined in Chapter 12, Assessing Your Resources and Developing Your Ideas) and make a list of ways you can build up your networks. Include a specific list of events you could attend, courses you could take and people you should meet who could help you with your work. Make a specific list of activities you can undertake to bring you in contact with the people you want – and need – to meet.

- **Gain credibility.**  
What will build credibility in your arts sector? Prizes? Scholarships? Performances? Prepare a list of possible projects; select those which will be most effective.
- **Undertake skills development.**  
Review your strengths and weaknesses. Take at least one skills development course related to improving your identified weaknesses and one related to your art: training, lecture series, masterclasses, etc.
- **Fine tuning and practice.**  
Take every opportunity to practise your craft, increase or improve your repertoire or range.
- **Get feedback and advice.**  
Set up mechanisms for getting reactions to your work, consult with gallery owners, producers and directors, other performers or artists, ask your customers and conduct research.
- **Experiment with limited advertising and publicity.**  
Make a list, based on the information in Chapter 11, Promotions, of promotional activities you can undertake.

If this looks like a long list, don't worry – it is! The first step is to list everything you *could* do. We'll do a reality check shortly.

The next stage is to go back through your list and set priorities for each category. Select the three or four most important activities for each task. (If it looks as though there are six urgent things to do with developing local markets, that's fine. If they are that important, keep them all on your list. You may find that there are really only one or two things you need to do in terms of training, so it will probably all balance out in the end.)

### THERE'S TOO MUCH TO DO — AND NOT ENOUGH TIME AND MONEY

Once you've set priorities, look at each of your priority items. How much time will it take? How much money will it cost? Who can/will do it? Will it require special resources (equipment, expertise, etc.)?

Now the juggling begins:

- How much money have you got for your first year in business? Have you got back-up funds and support?
- Have you got a finite, limited sum?
- Are you expecting to earn everything as you go?

In technical marketing terms we are talking about a **cost/benefit analysis**.

This is a very important term. To analyse the cost/benefit of activities we evaluate exactly those two things – the amount of benefit we will get from undertaking the activity and what it costs in terms of time and money.

At this stage of planning we almost certainly have more things we'd like to do than we have either time or money for, so some decisions will have to be made. We follow a five-step sorting process (a cost/benefit analysis):

1. List all the activities that can be undertaken.
2. Estimate the likely benefits of each activity (put them in order, most useful to least useful).
3. Estimate the cost of each activity (financial).
4. Compare the costs required to the benefits of doing the activity.
5. Decide which activities will be the best to do (or see where along the list your money runs out!)

For example, you've received several suggestions about how to promote yourself and your work. One suggestion is to produce a media kit with colour photos, copies of publicity from newspapers and magazines, and letters from people who have booked your group to play at corporate functions, weddings and festivals, and an audio tape of your work.

Another option is to produce a video which provides all the essential information. A third option is to produce a CD which would incorporate multimedia presentations, with video clips, voice-over and the print materials all incorporated.

Costs and effectiveness will play a big part in the final decision. If your work is unusual, high impact or uses distinctive props, then the CD may be a wise option. If, however, your work is fairly traditional, then a media kit, with an audio tape or video, may be more cost-effective.

And, of course, build in a buffer – allow yourself some unexpended money (if possible!), to take advantage of opportunities that may come up.

Then do the same exercise again, thinking about the **time** involved. Keep in mind you are considering both your time and the time of others (if you have assistance).

1. List all the activities that can be undertaken.
2. Estimate the likely benefits of each activity (put them in order, most useful to least useful).
3. Estimate, broadly, the time required for each activity.
4. Compare the time required to the benefits of doing the activity.
5. Decide which activities will be the most viable to do.

For example, if you are a jeweller, there are several ways you could build awareness of your work. You could enter competitions; you could work with fashion designers, providing items for fashion shows; you could get celebrities to wear your pieces to major events, so your jewellery could enjoy a high degree of publicity and exposure.

First, assess which activities would have an impact on your target markets. Are they more likely to be impressed with a design award, or a photograph of your jewellery in *Women's Weekly* society columns? If the design competition and fashion industry concepts seem more appropriate to your target audience you would then need to consider the time and effort involved with the two activities. Competitions have deadlines, whereas working with the fashion industry involves networking, phone calls, appointments, etc. If the benefits of the two activities are about the same, you may decide entering a competition is a better use of your time.



# WORKSHEET 7

## *action plan, cost benefit analysis*



List the key things you would like to do in each category:

	Building awareness of your work	Estimated time	Estimated cost \$
1.	.....	.....	.....
2.	.....	.....	.....
3.	.....	.....	.....
4.	.....	.....	.....
5.	.....	.....	.....
6.	.....	.....	.....

Most effective things to do (in terms of time/money)

1. ....
2. ....
3. ....

	Development/location/ distribution strategies	Estimated time	Estimated cost \$
1.	.....	.....	.....
2.	.....	.....	.....
3.	.....	.....	.....
4.	.....	.....	.....
5.	.....	.....	.....
6.	.....	.....	.....

Most effective things to do (in terms of time/money)

1. ....
2. ....
3. ....

*continued*

*continued*

**Develop markets**

**Estimated time**

**Estimated cost \$**

1.		
2.		
3.		
4.		
5.		
6.		

**Most effective things to do (in terms of time/money)**

1.	
2.	
3.	

**Build contacts/networks**

**Estimated time**

**Estimated cost \$**

1.		
2.		
3.		
4.		
5.		
6.		

**Most effective things to do (in terms of time/money)**

1.	
2.	
3.	

**Increase credibility**

**Estimated time**

**Estimated cost \$**

1.		
2.		
3.		
4.		
5.		
6.		

*continued*

*continued*

Most effective things to do (in terms of time/money)

1. ....
2. ....
3. ....

Undertake skills development	Estimated time	Estimated cost \$
1. ....	.....	.....
2. ....	.....	.....
3. ....	.....	.....
4. ....	.....	.....
5. ....	.....	.....
6. ....	.....	.....

Most effective things to do (in terms of time/money)

1. ....
2. ....
3. ....

Advertising and publicity	Estimated time	Estimated cost \$
1. ....	.....	.....
2. ....	.....	.....
3. ....	.....	.....
4. ....	.....	.....
5. ....	.....	.....
6. ....	.....	.....

Most effective things to do (in terms of time/money)

1. ....
2. ....
3. ....

The list of 'most effective things to do' that you have put together for each section of this worksheet can be used when you develop the action plan and budget of your marketing plan (Worksheet No. 8: Marketing Plan).



## HOW MUCH DETAIL? WHAT TIME PERIOD?

Traditionally, short-term planning covers a one-year period, and it's done in detail, as we've seen (but still allows for some flexibility). Longer term planning is usually done over the three to five-year time period, although for some long-term goals, the time period can be greater (up to 10 or 20 years in some cases). However, the plans aren't nearly so detailed. Usually they are only a page or two long, and sometimes only a few paragraphs, simply serving to reinforce the importance of certain goals or activities.

Year Two of a plan could cover some of the following points:

- review the successes and difficulties of Year One;
- assess progress towards long-term goals;
- assess budgeting and scheduling for Year One, and make adjustments as required;
- focus on identifying and developing secondary markets;
- research customers and obtain feedback;
- introduce targeted direct marketing;
- increase advertising and promotions, target specific markets;
- consolidate networks and contacts;
- approach specific organisations/outlets/directors, etc.;
- develop and improve products and skills.

Year Three:

- review operating procedures;
- assess progress towards long-term goals;
- review and refine advertising and promotions (including direct marketing);
- explore co-operative opportunities;
- establish ongoing relations with key networks and individuals;
- review and improve packaging;
- review distribution channels, agents, etc.;
- consider the international market.

## HANDLING THE UNEXPECTED

By now you may be getting a bit nervous. These long lists look as though they could spell the end of spontaneity and set you on a road to regimented schedules, clipboards and stopwatches. Don't panic! It's not as bad as it looks.

This process of setting priorities will actually give you MORE time to be spontaneous, because it will help you to keep focused on the things you really want to achieve. In the course of everyday work it can be easy to get distracted. People will come to you with suggestions about activities you could try, will ask you to help or assist with shows, fundraisers, exhibitions, or will offer you 'an opportunity you can't afford to refuse'. And because you've already gone through your long, long list and identified the things that really count, you'll be in a much better position to evaluate, and take advantage of, opportunities and serendipitous situations when they occur.

If unexpected problems arise, you'll be able to refocus on priorities, and look at either extending timeframes or budgets. And, of course, if unexpected opportunities do appear, you'll already have a list of the things you'd like to do — money and time permitting.

Occasionally opportunities do come out of the blue which are too good to pass up, so don't pass them up. Remember, your plans are a reflection of your current situation. If an opportunity presents itself that fits into your long-term goals, and just changes your scheduling around, then that's fine. If an opportunity you've never considered comes up, then take time to consider it in terms of three basic questions: What would you like to do? Where would you like to do it? Who would you like to work with? If the opportunity can further one of those dreams, then go for it!

If you're not sure what it will mean, take some time to review the opportunity in terms of your goals, talk to the people in your network whose opinions you value and do a cost/benefit analysis. It's useful in a lot of situations.

## consider this

*It's time to prepare your action plan.*

*You will need to list the specific activities you intend to complete for each category, in priority order.*

*Assign staff responsibilities and budgets as applicable.*



### 1. Activities to achieve long-term goals

.....

.....

.....

.....

### 2. Activities to achieve short-term goals

- *set your success targets*

*Time*

.....	
.....	
.....	

- *build awareness of your products/services*

*Time*

.....	
.....	
.....	

*continued*

*continued*

- *review and refine distribution*

*Time*

.....	
.....	
.....	

- *develop markets*

*Time*

.....	
.....	
.....	

- *build contacts and networks*

*Time*

.....	
.....	
.....	

- *gain credibility/reputation*

*Time*

.....	
.....	
.....	

- *undertake skills development*

*Time*

.....	
.....	
.....	

- *fine tuning and skills practice*

*Time*

.....	
.....	
.....	

*continued*

*continued*

- *feedback and advice*

*Time*

.....	.....
.....	.....
.....	.....

- *advertising and publicity*

*Time*

.....	.....
.....	.....
.....	.....

### KEY POINTS TO REMEMBER

- The action plan is the real heart of planning. It translates theory into action. Once you have assessed your situation and set your goals, prepare the action plan to identify achievable objectives and set a schedule for reaching these objectives.
- A good action plan includes activities to address both long-term and short-term objectives. It includes measurable objectives in terms of such things as income, general awareness (visibility), distribution strategies, market development, developing contacts and networks, gaining credibility, skills development, and promotional activities.
- One way to set priorities for activities is to undertake a cost-benefit analysis.
- An action plan generally covers one year's activities in detail and addresses longer term planning (three to five years) more broadly. For some organisations long-term planning can span 10 years or more. Usually the longer term plans aren't so detailed. A written page or two may suffice.
- Plans don't mean you eliminate the opportunity to take advantage of unexpected opportunities. In fact, they can enhance your ability to respond quickly to new prospects as you are aware of your commitments, constraints and long-term goals. It is then easier to assess an opportunity to decide whether or not it is a good idea to act.

# 4.15

## MEASURING SUCCESS

### CHAPTER OVERVIEW

You are now ready to finalise your plan. Before you put it in final format, however, there are one or two more things to do. You need to consider the importance of anticipating the unexpected, and developing ways to measure your success. Finally we discuss the importance of feedback. And then, it's just a matter of writing it all up!

### TIPS FROM TOP MANAGERS

Top managers in mega-businesses have some rules for success. One of the most important ones is 'no surprises'. What they mean is: we should anticipate the things that could happen in our business, and plan for them, so that we aren't suddenly faced with the unexpected or forced into situations where we have to make on-the-spot decisions.

Quick decisions, often made in the heat of the moment, without a full understanding of all the implications of a problem or a complete analysis of the costs, can be a disaster. Sometimes problems can be made worse, and sometime good opportunities are lost.

In marketing jargon we talk about the importance of contingency plans – anticipating the unexpected and evaluating our activities on a regular basis to ensure we achieve our goals.

So think through likely scenarios, and plan in advance what you might do, then when something does happen you are in a far better position to handle it, because you have already thought the issue through. It can make all the difference.

### 'NO SURPRISES' STRATEGIES

The best way to think about 'no surprises' strategies is to let your imagination go – think about all the things that could happen in terms of your goals and objectives, and the things you decided to do as part of your action plan. Then consider some 'what if...' scenarios.

Start with the big ones.

What if...you had an accident and couldn't work? (Have you got insurance? Do you need it? How much should you have? Would other people look after you? Could you modify your work environment and continue to work?)

What if...there was a fire in your studio? (Insurance? Copies of work in other places? Work divided between locations so not everything would be lost? Photographs, recordings, copies, backup disks...what have you got organised, just in case?)

What if...you won a competition that includes a residency program? (Can you afford to extend your travel? When would be the most appropriate time to take the award? What would you do with the cat?)

Then move on to the smaller 'What if...' situations. Smaller, but still important.

What if...you got some really negative publicity for a project? (How would you handle it? Whose advice would you seek? Would it negatively impact on other projects? Could you find a way to minimise it? Would it affect your customers, sponsors, the galleries who show your work or the places you perform? What would you do to advise them of the potential problem?)

What if...you got some really positive publicity, and suddenly your work took off? (How would you handle publicity? What would you do to your prices? Would you consider increasing your output? How would it affect your existing customer base? (You don't want to offend or ignore those who have stood by you during the early stages.) How would you set your schedules? How could you build on it to achieve your goals?)

You don't have to make copious lists. It's enough to take some time to think about 'What if...' situations and imagine how you would react. No matter how many things you come up with, there will always be a 'What if...' you never considered.

## DEFINING SUCCESS

Measuring success involves looking at a number of things, including your sales, your financial viability, your credibility and reputation with your peers, changes or shifts in perceptions, the level of your target market's awareness and acceptance of your work, your progress towards goals and your personal sense of achievement and well-being.

Just as we've talked about the need to know where you're going, we also need to recognise when you've 'arrived'.

## ACHIEVING YOUR OBJECTIVES

When you were preparing your goals and objectives we discussed the importance of keeping goals general, but objectives specific and quantifiable. A goal could be to become successful, but the objectives were put in measurable terms, for example, exhibit in three shows, win one scholarship, receive publicity in a major arts journal, get four commissions next year.

A starting point for measuring success is to review the objectives listed in the business plan and compare your actual situation with your target. How many of your objectives have you achieved?

While a total count is useful, and may give you a warm glow of achievement, it's also important to analyse your activities.

- Were the objectives easy (perhaps you should set higher targets in the future)?
- Did you not achieve what you set out to do?
- Analyse why not, if that was the case...was the timeframe wrong?
- Did you need information you didn't have?
- Did you need more advance planning?
- Were there changes in circumstances that affected your ability to devote the necessary time and money to achieving success?
- Did you change your priorities during the year and downgrade this objective?

It's also useful to see if an objective actually did lead you along the path to your goal. Having achieved objectives, have you, indeed, moved closer to achieving major goals? Are there other things which would have been more effective?

## EVALUATING YOUR SUCCESS

Make a list of the objectives you set yourself in your long-term and short-term goals, and the activities you decided to undertake as part of your action plan. A checklist is the best way to undertake a preliminary review of your activities. This will provide a starting point for an evaluation of your success.

It's good to review progress regularly every three or four months. There's little point in assessing your position at the end of the planning period, when it's too late to make any changes in direction, identify potential problems or find new solutions.

Objectives and activities	Yes	No	Comment
<b>Objectives</b>			
Earn \$15,000	✓		Actually earned \$16,200
Exhibit in three shows		✓	Only one (didn't organise schedule properly)
Win one scholarship	✓		Yes, but only a minor local one (should have tried for something better)
Publicity in art journal	✓		Good, but very brief
Get four commissions		✓	Only one, but very useful (need to re-evaluate time to make contacts)
<b>Activities (Action Plan)</b>			
Attend 10 industry activities	✓		Attended 14 events (community activities were good, but the city evening launches were not very good for networking)
Join community arts network	✓		Good source of information
Prepare publicity kit	✓		Took much longer than expected, more expensive
Send out publicity kit to six arts publications		✓	Haven't located a good mailing list, worried about costs
Research current customers	✓		Did simple research in conversation with customers (need to do more)
Attend arts seminar — marketing	✓		Attended one on PR, expensive, pretty good
Attend computer graphics course		✓	Courses were too expensive (check community centre)

After completing your review you'll know what was successful, what problems arose and what you want to reconsider for your next plan.

See if there is a pattern:

- Are you good with sales targets, but not so great at publicity and promotions activities? Is that because you feel uncomfortable doing publicity work?
- Are you finding excuses not to do certain types of work? If so, can you delegate those areas to someone else?
- Can you work out why you're uncomfortable, and can you remedy the situation?

Not achieving targets isn't the end of the world, as long as you know why, and know what to do to improve things.

After the first six months or so you will have the start of a database which will give you valuable feedback on how you are doing. In technical terms we call this 'benchmarking' your performance. When you know your starting point, you can then compare your progress as you work towards achieving your goals.

It is also useful to be able to compare yourself with others. If you are keeping track of your income, and can obtain the results of published research on artists' incomes, you'll be able to compare your level of financial success with others. (This information is available through the Australia Council, ABS, State and Territory funding agencies and art form peak bodies.) If you are keeping track of where your customers come from, you can compare that information with that of other artists in your area and look for similarities and differences (which you may be able to take advantage of through joint activities).

Of course, marketing planning is a continually evolving practice. We can't write a plan, then simply say, 'Thank goodness, that's done!' and put it away in a file.

Plans need to be reviewed and updated regularly, and it is important to remember that marketing concepts themselves are constantly changing and developing. Keeping up to date through new publications and arts marketing web sites (see the recommendations at the end of this publication) will improve your success potential.

## GETTING FEEDBACK

Your business plan will provide you with ways to measure your performance, but it is also very useful to get other people's opinions about your progress and your work. You can make use of your networks, and measure your success by looking at the level of your 'repeat business':

- Do you have a regular group of customers? Talk to them, find out what they like and don't like about your work.
- Do they think you are going in interesting new directions?
- Do they like the fact that your work doesn't seem to change and is very reliable? (How do you feel about those assessments?)

Ask the people who help you find work (booking agents, directors, producers, agents, shop retailers) for feedback:

- What do they like or dislike?
- What could you improve?
- What trends are they seeing out in the marketplace? Is demand for what you do increasing or decreasing?

- Do you have more competitors than you used to?
- Can they give you any recommendations about new things to try? Things you should be working on to improve?

A word of warning here: sometimes we ask for advice, but we really don't want an honest reply. It can be hard to have someone criticise, even mildly, our creative endeavours. If you cannot accept criticism without defensiveness or anger, then stop asking for feedback.

If you are extremely sensitive, start by getting feedback through more indirect situations. If you're a painter, attend some art shows which include work similar to yours. Walk around and listen to what people are saying. If you're a musician, attend performances of similar work, read reviews and listen to comments during the interval. And talk to other artists and see what kind of feedback they have received, and how they felt about it.

Pick out some exhibitions or performances of people whose work you truly admire. Attend those and listen to comments and feedback, read reviews and so on. You may discover there are a few reviewers or other artists or friends whose opinions seem to match your own views, or who you respect. Then approach them. The results may still not be all you'd hoped for, but at least you'll know where they're coming from, and that you really should consider their comments carefully, rather than just dismiss them as uninformed and unfriendly.

### MEASURING THE NON-MEASURABLES

Not all elements of your plan are quantifiable. It is easy to see how many items you've produced, or how many performances you've given, but it is also important to evaluate how you feel about your work and where you're headed.

Now that you're on the road to success, does it feel like the right road? Are you comfortable with what you're doing?

Do you feel positive about the future? Are you starting to have some nagging doubts? Do you feel as if you may have set the wrong priorities? NOW's the time to rethink and revise. As we've said before, plans can change.

### consider this

Identify the ways in which you'll measure your success.

Base this on your review of your objectives and action plan.

Objectives:

	Yes	No	Comments
.....			
.....			



*continued*

*continued*

**Objectives:**

**Yes**

**No**

**Comments**


**Activities:**

**Yes**

**No**

**Comments**




# WORKSHEET 8

## marketing plan



This is the outline for your strategic marketing plan. Remember it's quality, not length that is important.

Your plan may only be three or four pages long, but if you've put thought into it, and carefully considered your goals and objectives and your action plan, that will be more than enough. On the other hand, if you feel more comfortable addressing things in detail, then by all means do so.

A small arts organisation may find, for example, a plan of 15-20 pages is useful not only as a strategic planning guide, but as a communications tool with others both inside and outside the organisation. Therefore they may go into more detailed background information, especially sections one to five.

### 1. CURRENT SITUATION

- A. Mission and/or vision statement (the goals you want to achieve, your vision for yourself/your arts organisation). Refer to Chapters 4 and 8.
- B. Description of your arts activity (a short description of your product, service, concept, etc.). Refer to Chapters 1 and 6 and Worksheet No. 1: Defining your Art.
- C. Analysis of operating environment
  - Market analysis (a description of your target markets (existing and potential) – who they are, why they buy (or might buy) your products. Refer to Chapters 2, 5, 6 and 9 and Worksheet No. 3: Understanding your Market.
  - SWOT analysis (strengths, weaknesses, opportunities and threats) including anything from your environmental analysis (political, social, economic, environmental and ecological, technological). Refer to Chapters 5 and 7 and Worksheet No. 2: Your SWOT Analysis.
  - Product analysis (brief description of your core and ancillary products and services). Refer to Chapter 10 and Worksheet No. 4: Analysing your Product.
  - Competition analysis (description and analysis of 'competition' in terms of both direct and indirect competition and an outline of competitive strengths and competitive strategies). Refer to Chapter 5.
  - Networking and people skills analysis (contacts, volunteers, board members, friends, skills and training). Refer to Chapter 10.

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## 2. **MARKETING GOALS, OBJECTIVES AND STRATEGIES**

Describe your overall goals and objectives for the next year and, more broadly, over the next three to five years.

- A. Career direction/organisation directions, goals and strategies – refer to Chapters 1, 3 and 4.
- B. Product goals and strategies – refer to Chapter 10.
- C. Pricing goals and strategies – refer to Chapter 10.
- D. Place/distribution goals and strategies – refer to Chapter 10.
- E. Promotion goals and strategies – refer to Chapter 11 and Worksheet No. 6: Promotions Plan.
- F. People/networking goals and strategies – refer to Chapters 10 and 12.

## 3. **ACTION PLAN**

Your action plan includes specific activities for each objective, including a time frame. Describe in detail the activities you will undertake to achieve your objectives. Refer to Chapter 14 and Worksheet No. 7: Action Plan, Cost Benefit Analysis.

## 4. **MARKETING AND PROMOTIONS BUDGET**

Your budget. Take this information from the work you did on pricing, your general budget and the cost-benefit analysis you undertook. Also include information on your cash flow and outline steps to counter any anticipated cash flow problems. This is one area where you may need additional assistance. Refer to Chapter 10 and Worksheet No. 5: Cash Flow Forecast for One Year.

## 5. **MEASUREMENTS**

Briefly describe the ways you will check along the way to ensure you're achieving your 12 month objectives. Refer to Chapter 15.

## 6. **EXECUTIVE SUMMARY**

If your plan is more than three or four pages long, or if it is to be distributed to a number of people either inside or outside your organisation, you should include an executive summary. Ideally it should be not more than one to two pages long and should include brief summaries (using dot points to convey information quickly and easily) of each section. Write it after you've written the plan, and then put it either at the front or the very back of the plan.



## KEY POINTS TO REMEMBER

- Quick decisions made in the heat of the moment can be a disaster. Thinking about things that could go wrong and developing contingency plans helps to avoid unpleasant surprises and ensure you have a basis for decision making.
- Measuring success can include a number of criteria: sales, financial viability, reputation with peers, popularity, development of new target markets, increased recognition and a sense of achievement.
- It is important to review progress regularly, every three or four months, rather than wait until the end of the planning period to check progress. If it isn't done regularly it will be difficult to implement contingency plans to correct potential problems.
- It is important to get feedback from customers, colleagues, booking agents, directors or distributors. It is also important to attend industry activities and see how others are doing and what new developments are affecting the marketplace.