



MUFFIN

MASTERING THE UNDERESTIMATED FUNDRAISING FINANCIAL LITERACY FOR SPORTS PROFESSIONALS



ΕΛΛΗΝΙΚΟ ΣΩΜΑΤΕΙΟ
ΔΥΝΑΜΙΚΟΥ ΤΡΙΑΘΛΟΥ



Purpose

This tool aims to equip sport professionals, including board members, sports managers, and administrative staff in sports organizations, with the tools and knowledge to develop and execute a comprehensive marketing, sponsorship, and promotions plan

This tool consists of two parts

1. Checklist that helps create marketing plans and planning for acquiring sponsors
2. Spreadsheet that allows you to plan expenses to achieve your marketing or sponsorship goal

Key Features:

Automated Calculations:

The tool automatically calculates monthly and yearly totals of planned expenses, simplifying financial tracking and reducing errors in manual calculations.

Drop-Down Menus for Easy Categorisation:

Pre-defined categories for expenses are available in drop-down menus, streamlining the data entry process and ensuring consistency.

Dashboard for Financial Overview:

A visual dashboard presents an at-a-glance view of the club's financial status, including graphical representations of expenses.

User-Friendly Interface:

Designed with ease of use in mind, ensuring that staff and volunteers can efficiently manage and interpret financial data without needing advanced Excel skills.

Customizable Categories:

While the tool comes with predefined categories, clubs have the flexibility to add or modify categories to suit their specific needs.

Benefits:

- **Enhanced Financial Management:** Provides a comprehensive picture of the club's financial activities, helping in making informed decisions.
- **Efficient Fundraising Planning:** Assists in identifying successful income sources and areas where fundraising efforts can be intensified.
- **Budgetary Control:** Helps in monitoring and controlling expenses, ensuring that the club operates within its financial means.
- **Transparency and Accountability:** Facilitates clear and transparent financial reporting to club members, stakeholders, and potential donors.

Usage Scenarios:

- Ideal for clubs looking to streamline their financial management processes.
- Useful for clubs applying for grants or reporting to sponsors, where detailed financial documentation and a development plan and marketing plan are required.

Access and Distribution:

- The tool is created in Excel and can be shared digitally among club staff and volunteers.
- Regular updates and backups are recommended to maintain data integrity.

KEY SUBSTANTIVE AND FINANCIAL ELEMENTS

Marketing Analysis of Grassroots Sports Clubs

1. **DEFINE THE GOALS:** Determine what the main goal of the plan is and what the intermediate goals are.

Answer the questions: (What do we want to achieve? What is our expected end result?) and write it on sheet

2. CLUB DESCRIPTION: Information about the company name and registered office and the overall mission of the operation

Answer the questions: (What is our mission? what is our potential? What environment do we operate in?) and write it on sheet

3. GROUP DESCRIPTION TARGET: Characteristics of the group for which we want to prepare our plan.

Answer the questions: (Who are you addressing your offer to? Who do you want to reach?) and write it on sheet

4. ANOTHER CLUBS ANALYSIS: Analysis of marketing activities of clubs with similar economic potential

Answer the questions: (What are they doing? How do they advertise? How do they differ from our club?) and write it on sheet

5. SWAT ANALYSIS: Identify your strengths and weaknesses of your offer

Answer the questions: (What are our Strengths? What are our Weaknesses? What are our Opportunities? What are our Threats?") and write it on sheet

6. SMART GOALS: Determine where you want to go and when time

Answer the questions: (Whether really our goals are: specific, measurable, available and important?) and write it on sheet

7. MARKETING TOOLS CHOICE: Choosing the most effective marketing tool (e.g. asana, trello, google)

Answer the questions: (Which marketing tools can we use? Who among the staff can operate the tools?) and write it on sheet

8. BUDGET TERMS: Specify the maximum amount per activities and areas you want divide them

Answer the questions: (How much can we spend? How to divide the budget?) and write it on sheet

9. MEASURING THE EFFECTIVENESS: Tools for measuring and analysing the effectiveness of marketing, sponsorship and promotional strategies

Answer the questions: (What effects do we want to check? What will help us verify our effectiveness?) and write it on sheet

EXPENDITURES FOR GRASSROOTS SPORTS CLUBS

Annual marketing budget form: As a result of the previously performed analysis, you can plan a marketing budget using a ready-made form. Just enter your planned expenses in the appropriate columns

1. SUBSCRIPTIONS

- Server, internet domain and SSL certificate
- Public Relations consulting
- Media monitoring
- A system for sending mailings

2. ONLINE COMMUNICATION

- Website editing
- Google Ads campaigns
- Social media campaigns

3. OFFLINE COMMUNICATION

- Prints (e.g. business cards, leaflets, posters, roll-ups, folders)
- Graphical support
- Sponsorship of external events
- Christmas presents

MARKETING AND PROMOTION PLAN TEMPLATE AND EXAMPLE

9_MARKETING PLAN&BUDGET TEMPLATE

INSTRUCTIONS FOR USING THE FUNDRAISING BUDGETING TEMPLATE

1. Open the Template: Open the Excel file named “6_MARKETING PLAN&BUDGET_TEMPLATE”.
2. Analyse your club in the marketing plan sheet: fill the data according to the instructions and you will have ready material for your marketing plan
3. Open the Annual Budget sheet: fill the costs of planned marketing activities in the table. There are ten ways to plan your budget.
4. Monthly Updates: Update the template regularly, ideally at the end of each month, to keep track of the club’s marketing plan implementation.

5. **Analyse Financial Health:** Use the data and visuals in the template to make informed decisions about the club's marketing plan. Identify areas where expenses can be reduced or where additional fundraising may be needed.

6. **Seek Assistance If Needed:** If you encounter any difficulties or have questions about using the template, don't hesitate to ask for help from someone familiar with Excel.

Regularly back up the file to prevent data loss.