



9 July 2021

# A co-op guide to marketing an offer

First edition published July 2021 by the Business Council of Co-operatives and Mutuals (BCCM).

GPO Box 5166, Wynyard, Sydney 2001 | [www.bccm.coop](http://www.bccm.coop)

© Business Council of Co-operatives and Mutuals (BCCM)

This work is licensed under the Creative Commons Attribution 3.0 Australia Licence (CCBY 3.0). This licence allows you to copy, distribute and adapt this work, provided you attribute the work and do not suggest that BCCM endorses you or your work. View a full copy of the terms of this **licence**.

DISCLAIMER: While the BCCM endeavours to ensure the quality of this publication, the BCCM does not accept any responsibility for the accuracy, completeness or currency of the material included in this publication, and will not be liable for any loss or damage arising out of any use of, or reliance on, this publication. This publication is not legal or other professional advice and should not be relied on as such.

ACKNOWLEDGEMENTS: This document was produced by the BCCM in collaboration with **Cooperative Bonds** and **Tough Cookie Marketing** as part of the **Co-operative Farming** project. Co-operative Farming was supported by Department of Agriculture, Water and the Environment through funding from the Australian Government's Starting Farm Co-operatives Program.

BCCM thanks Co-operative Bonds, Tough Cookie Marketing and The Coota and District Co-op for their contributions to this guide.

## Table of contents

---

<b>Introduction.....</b>	<b>5</b>
<b>Resources.....</b>	<b>6</b>
<b>Definitions .....</b>	<b>7</b>
<b>The co-op offer .....</b>	<b>8</b>
<i>At pre-registration stage?.....</i>	<i>8</i>
<i>Marketing your first or opening offer?.....</i>	<i>8</i>
<i>Raising additional capital?.....</i>	<i>8</i>
<b>Activity .....</b>	<b>8</b>
<b>Resources.....</b>	<b>9</b>
<b>Activity .....</b>	<b>9</b>
<b>Case study examples.....</b>	<b>10</b>
<b>Develop the message and share your vision.....</b>	<b>11</b>
<i>Why are you doing this? What is your vision?.....</i>	<i>11</i>
<i>Building the story.....</i>	<i>11</i>
<i>Then this happened .....</i>	<i>11</i>
<i>This is our vision .....</i>	<i>11</i>
<b>Activity .....</b>	<b>11</b>
<b>Case study examples.....</b>	<b>12</b>
<b>The value of your vision.....</b>	<b>13</b>
<i>From your business plan.....</i>	<i>13</i>
<i>From your rules.....</i>	<i>13</i>
<i>By taking up this offer you will: .....</i>	<i>13</i>
<b>Activity .....</b>	<b>14</b>
<b>Case study examples.....</b>	<b>14</b>
<b>Important messages .....</b>	<b>15</b>
<i>Time bound messaging .....</i>	<i>15</i>
<i>Tone of messaging .....</i>	<i>15</i>
<b>Resources.....</b>	<b>16</b>
<b>Activity .....</b>	<b>16</b>
<b>Case study examples.....</b>	<b>17</b>
<b>Deliver the message .....</b>	<b>18</b>
<i>Who.....</i>	<i>18</i>

<b>Activity</b> .....	<b>18</b>
<b>Case study examples</b> .....	<b>19</b>
<b>Where</b> .....	<b>20</b>
<b>Activity</b> .....	<b>21</b>
<b>Case study examples</b> .....	<b>21</b>
<b>How</b> .....	<b>22</b>
<b>Resources</b> .....	<b>22</b>
<b>Resources</b> .....	<b>23</b>
<b>Activity</b> .....	<b>23</b>
<b>Case study examples</b> .....	<b>23</b>
<b>Tips</b> .....	<b>24</b>
<i>Logo</i> .....	24
<i>Style guide</i> .....	24
<i>Creative software</i> .....	24
<i>Educational resources</i> .....	24
<i>Website</i> .....	25
<i>Launch event</i> .....	25
<i>Printed materials</i> .....	26
<i>Video</i> .....	26
<b>The Plan</b> .....	<b>27</b>
<i>What you are doing when</i> .....	27
<i>A launch event</i> .....	27
<i>Social media</i> .....	27
<i>Hard copy print</i> .....	27
<i>A website</i> .....	28
<i>A video</i> .....	28
<i>Resources</i> .....	28
<b>Activity</b> .....	<b>28</b>
<b>Case study examples</b> .....	<b>28</b>
<b>Our Co-op Offer 1</b> _____	<b>29</b>
<b>Additional resources</b> .....	<b>31</b>
<i>Online co-op resources</i> .....	31
<i>Examples of co-op websites providing access to forms and information:</i> .....	31
<i>Articles of interest</i> .....	31
<i>Online tools</i> .....	31

## Introduction

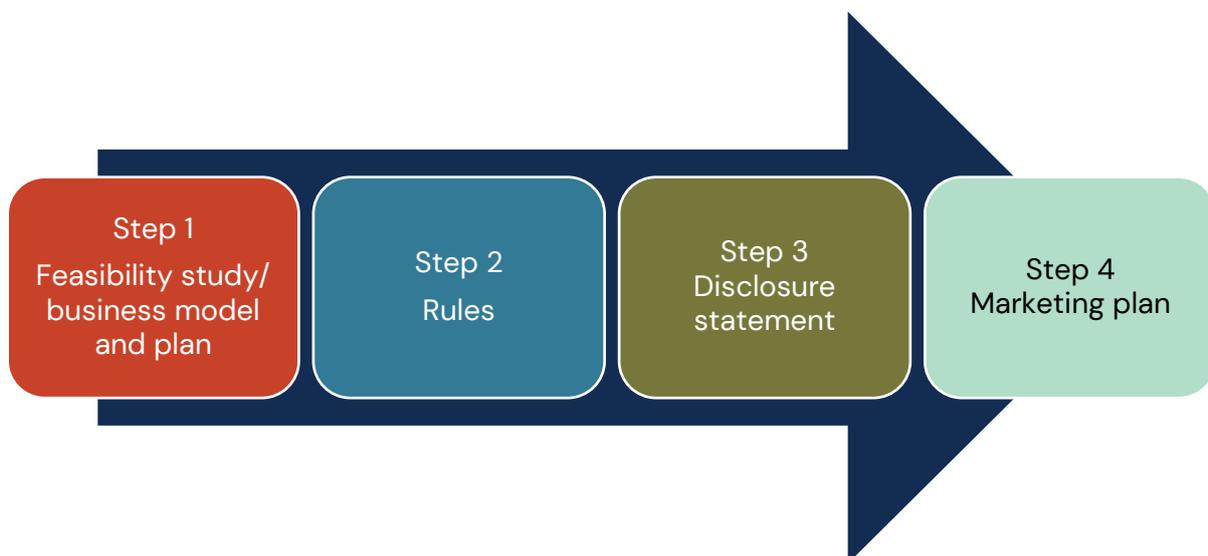
---

When a co-op wants to launch an offer for membership and/or investment, it is recommended that it develops a planned approach.

This guide is designed to support a co-op with the promotion of an offer. It provides a step-by-step guide to create and implement an offer-specific marketing plan.

The main focus of this plan will be to ensure that potential members and investors receive information on the vision of the co-operative and how they can experience the journey as a member/investor.

Before the marketing plan is developed it is recommended that the following three steps have been completed. For established co-operatives, step two may not always be required.



**Step 1 Feasibility study/business model and plan** is to establish that there is a viable and sustainable business case behind the offer, including a detailed business plan outlining how this offer will move from an idea to supporting a viable and sustainable co-operative.

**Step 2 Rules** is to draft the co-operative rules for a new co-op, or, if required for existing co-ops, to make any amendments.

Step 3 Disclosure Statement is to draft the disclosure statement, or for existing co-ops, to provide an updated disclosure statement, as required for the type of offer.

**Step 4 Marketing plan** is to create and implement a marketing plan detailing who is/are the target audience/s, what are the important messages and how you will share these messages.

## Resources

---

These resources provide more information relevant to the above steps.

[Co-operative Foundations module 4](#) – an online course designed to provide a foundational understanding of the co-op structure. The topic of module 4 is Business Planning.

[Business plan template](#) – a simple generic business plan that can be used by a co-op to test and develop their business plan.

[Capital Builder](#) – a free resource for co-operatives thinking about raising new funds.

[Co-op Builder](#) – a step by step tool to help groups prepare and understand the legal documents required to form a co-op in Australia.

[Community Investment for Co-operatives Handbook 1](#) – refer to Parts 3 and 4 for what is required to prepare different types of offers.

This guide will help you to plan marketing your offer, as well as provide practical tips on producing promotional content.

It is broken down into the following sections; and we recommend that you start from the beginning and work through them in order.

**Develop the message and share your vision** – this section focuses on developing your message, capturing the background, why you are doing this and the value behind your offer.

**Deliver the message** – this section supports you to effectively plan to deliver these messages.

**The plan** – this section provides a framework to plan and launch your offer.

Each section provides background information on its relevance, and practical activities that your co-op can work through, with case study examples of them in action.

## Definitions

---

<b>Term</b>	<b>Definition</b>
Actions	The fact or process of doing something, typically to achieve an aim.
Business plan	A business plan is a formal written document containing the goals of a business, the methods for attaining those goals, and the timeframe for the achievement of the goals.
Call to action	A call to action is an invitation for someone to take a desired action.
Co-op business model	A business model describes the rationale of how a co-op plans to create and deliver member value.
Goals	A goal is an idea of the future or desired result that a person or a group of people envision, plan and commit to achieve. People endeavour to reach goals within a finite time by setting deadlines.
Marketing and promotion	Marketing refers to activities that a co-op undertakes to promote the buying or selling of a product or service, which may include membership and investment.
Quantitative vs qualitative	Quantitative data can be counted, measured and expressed using numbers. Qualitative data is descriptive and conceptual.
Strategy	A strategy is a plan of action designed to achieve a long-term or overall aim.
Tools	A tool is something used in performing an action or activity that helps you to reach an outcome.

## The co-op offer

---

What is the offer, or offers, that your co-operative is making?

Are you:

### **At pre-registration stage?**

- Testing the feasibility of your co-op and seeking expressions of interest?
- Testing the proposed business model for your co-op and seeking feedback?

### **Marketing your first or opening offer?**

- Starting your co-op and offering initial membership?
- Starting your co-op and offering initial membership with minimum shares?
- Starting your co-op and offering initial membership with more than the minimum shares?

### **Raising additional capital?**

- Offering investment opportunities to raise capital using debentures or Co-operative Capital Units?

Is this offer aimed at new members, existing members or external investors or a combination?

## Activity

---

This document is to plan for marketing the following offer:

It is a member/external/both member and external offer. Delete irrelevant ones

## Resources

---

Please check the [Community Investment for Co-operatives Handbook](#) to ensure that your co-op meets the regulatory requirements for your type of offer.

Have you checked:

- If you need a disclosure statement?
- If you need to update your existing disclosure statement?
- If you have lodged your disclosure statement with your local registrar?
- That your offer is permitted by your rules (for example, do your rules allow for issue of Co-operative Capital Units (CCUs)?)
- That you have completed any member or registrar approval processes for the type of offer (for example, members need to approve issues of CCUs)

If your offer is for more than one item, then the sections in this document may need to be applied to each item, to reflect the different messaging required.

This offer might also just be an expression of interest to measure how much support exists for your co-op when you are at the feasibility or testing stage. This can gauge interest; show whether any further work is needed on the business model, marketing and disclosure content; and help to inform a launch date for an offer.

When considering the offer it is also recommended that you set a clear goal of what you are hoping to achieve.

## Activity

---

Our goal is for this offer to:

And this is how we will achieve it:

## Case study examples

---

This is a member offer.

Our goal is for this offer to raise \$750,000 to start a retail co-operative that is community owned and endorsed.

And this is how we will achieve it:

- By selling memberships, at \$30 each (\$20 membership fee and one member share - \$10) and
- Investment shares at \$10 each.

<b>The offer</b>	<b>Revenue target</b>
750 memberships (10% local population)	\$22,500
72,750 investment shares (minimum 1; maximum 40,000)	\$727,500
<b>TOTAL</b>	<b>\$750,000</b>

## Develop the message and share your vision

---

### Why are you doing this? What is your vision?

Why are you launching this offer? What motivated you to create this approach?

Note: make sure you have your business plan, rules and disclosure statement handy – it is important to keep your messages consistent.

### Building the story

- Briefly explain the situation that led to the idea of forming a co-op, or what led to the development of an established co-op's current strategy.
- What is the problem that your co-op is aiming to solve?
- In three sentences, give a brief history of the community, how it has always operated (its values as you believe them to be), and what makes it such a great community.

### Then this happened ...

- In one or two sentences describe what happened and how it led to the co-op/strategy idea.

### This is our vision ...

- Tell your story and sell your vision. In this section don't just focus on the business case, tell the story as though you are having a conversation with a potential investor and want to really inspire and excite them about the idea.

Be clear when telling this story who your offer is aimed at – the investors or the users of your co-op. For some co-ops these might be different. For example: people might invest in a retail co-op but not shop there; there might also be people who shop there but don't invest. Make sure you are clear about who you are aiming at before working on your messaging.

## Activity

---

Our story – Why are you doing this? What is your vision?

## Case study examples

---

### Our story

If you're from Cootamundra or just live and work nearby, you know what a great place it is: not only because of its location, but also because of all wonderful and resourceful people who live here. Over the years, the town has faced many challenges, but they have always been able to overcome them by being creative and working together to find solutions.

So, when we found out in late 2020 that our Target store was closing, the community sprang into action.

You may be thinking, 'So what if Target closed?', and that is a logical response. But when you think about it ... the more shops that close in Coota, the less vibrant our town centre will become. That could lead to fewer visitors to our town and, ultimately, more shops closing down.

We don't want that to happen.

But don't worry. We have a plan to take control of our town's future by creating an innovative, creative and exciting alternative: The Coota District Co-op, a retail space that will stock items that we need in our town and will provide employment for our youth.

The Coota District Co-op will be owned and managed by the community. This means that as a community, we will decide how it is run, what it sells and how it looks ... and we will be able to mould it into a business that works for us *and* keeps our hard-earned cash in the town!

What do you think? Sounds great doesn't it?

But we need your help to make it a reality. In order to get it off the ground, we need \$750,000. That's a lot of money, but if you think about it, just 10% of Coota residents each chipping in \$1,000 would reach our target.

We've already raised over \$50,000 towards our goal, but now we need to get the rest of the community to jump on board to be part of something that will reinvigorate our town's shopping precinct and give us all a sense of ownership and pride in our town.

Can we count you in?

## The value of your vision

---

Building on the background story, this section covers what you plan to do; the value of your co-op and this particular offer; and how important this offer is to co-op members, investors, stakeholders and the wider community.

Below are some prompts to help you clarify the value that sits behind the co-op and your offer.

Remember: you are selling the vision.

### From your business plan

- What is the vision for the co-op?
- Where does the co-op plan to be in 5 to 10 years' time? Why is this important?
- Is there a change you want to bring about at an industry/community/sector level?
- What is the leading motivation behind the co-op?

### From your rules

- What is the purpose/object of your co-op?
- What is the primary activity of your co-op?

Use the following questions to understand and capture what your co-op is planning and the value it will provide.

### By taking up this offer you will:

- Be supporting our co-op to ...
- Be helping our community to ...
- Be helping to build a ...
- Have access to ... (shared infrastructure/bulk purchasing/collective marketing/a housing community, etc)

Pull this into sentences that briefly describe (maximum 5/6 key points) the objectives of the co-op and what it will achieve/mean for the member, the co-op and the community if it is successful. This should be very aspirational and focused on the best-case scenario, without overpromising individual benefits.

**Note:** For some co-ops, the value to individuals might not be available in the short term, so be careful not to be misleading or to make promises that might be difficult to deliver.

## Activity

---

**Our story – by taking up this offer you will ...**

- 1
- 2
- 3
- 4
- 5
- 6

### *Case study examples*

---

**Our story – by taking up this offer you will:**

1. Ensure you can get the things you need without having to go elsewhere
2. Help create local jobs and opportunities
3. Put your hard-earned cash back into the community
4. Be able to make the Co-op work for the community by constantly adjusting what we stock based on community feedback
5. Show everyone that Cootamundrans are innovative and progressive in finding ways to keep the town alive and invigorated (that is, we create solutions)
6. Fill empty shops
7. Be part of an exciting moment in Cootamundra history

## Important messages

---

Next is to condense these sentences down into the important messages that you would like to share. We recommend that you have at least 2 important messages.

Note: each offer may require you to revisit your important messages – an offer to join a new co-op and buy the minimum shares might have a different message to a co-op asking existing members to buy more shares/invest in a new class of shares etc.

These messages might describe how much money is needed to get the idea off the ground and how everyone can get behind it – from individuals to businesses and community groups. They might include a sentence about what a difference their participation will make, no matter how big or small.

*Give some examples of what that means in terms of the number of people and level of investment that you need, and by when, in order to meet your target launch date. Make sure it is in line with what you think is feasible in your community. Refer back to 'The Co-op Offer' section of this document.*

### Time bound messaging

*Consider if your messaging needs to create a sense of urgency by sharing your vision of when you plan to have your co-op up and running, for example, 'There's no time to waste'.*

Note: marketing and messaging should not suggest that there will be any financial returns on investments and **should avoid any forecast, suggestion or statement about financial returns.**

Marketing and promotion should focus on the experience of being part of the journey in achieving the outcomes identified in the co-ops vision. Messaging can also include outcomes of recent research around markets and the potential opportunities. You might also consider sharing the success of previous offers and current business performance.

**A note on brevity:** less is more ... you have around three or four minutes to sell the idea. This is not the time for going into detail. Only put information that makes your offer as irresistible as possible. Preferably keep your sentences short and to the point.

### Tone of messaging

Now that you have worked out the content of your message, you need to consider the tone of the message.

Remember, you want to motivate and inspire people to be a part of the co-op; to make them feel that they will be missing out on something meaningful and important if they don't participate.

The tone can be one, or a combination of, the following examples:

- Matter of fact

- Inspiring
- Determined
- Urgent
- Rising to the challenge as a collective
- We can and we will
- Serious
- Light-hearted

Your tone should be decided based on the general mood of the community in terms of the challenge that has led to this moment.

If you can, be passionate and excited in your presentation – it is contagious! And where possible have a bit of fun with it: help people to see that working together can bring joy and create a lot of positivity in the community.

Consider testing your message with a small group of people that match your target audience. Be prepared to listen to their feedback – especially if you are not part of this target market.

## Resources

---

Some online examples of important messaging being used by co-ops:

[Monty Hub Project](#)

[Pingala | Fairer Energy 4 Pines Project](#)

## Activity

---

	Our important messages
1	
2	
3	

## *Case study examples*

---

### **Our important messages:**

1. Shop locally
2. Reinvigorate the town
3. Provide a service
4. Provide employment
5. Provide traineeships
6. An empowered community controlling our own future
7. A chance to be part of something special
8. Play a part in looking after the future of the town
9. Make history and be the envy of other regional towns
10. Willingness to help other towns

## Deliver the message

---

### Who

To whom are you marketing this offer?

This is often referred to as your 'target market' or 'audience' and will influence where and how you plan to reach them.

Your target market might range from being individuals, businesses or community organisations. Each offer might have multiple target markets.

Your offer documents may restrict the audience to certain groups. If, say, your offer is for member shares, then it will only be available to current or potential co-op members. In this case, your audience will be determined by the active membership and the member qualifications requirements in your rules.

As an example: in a dairy co-operative, the rules may restrict membership to registered dairy farmers. The target audience for an offer of shares in their co-op is therefore restricted to registered dairy farmers.

In a consumer-owned co-op, such as a community retail outlet, where most people will be able to qualify for membership, the pool of potential investors in shares is large. In this case, you will need to think more about sub-groups within the potential membership you wish to target. We recommend listing each (sub) target market.

### Activity

---

	Our target markets/audience
1	
2	
3	
4	

**Note:** Co-op membership with minimum shares and co-op membership with additional shares may have the same target audience – it is the messaging that might vary.

## *Case study examples*

---

### **Our target markets/audience**

1. People that Cootamundra has been good to; that is, those who have been successful here – both those still here and those who have moved away
2. Create a list, with contact details of the residents who may be able to contribute more.
3. Families – that is, parents with children
4. Professionals and tradespeople

Create a list with contact details of the businesses that have been in the area for years that might make a more significant investment.

5. Those with pride in the town
6. Local and regional shoppers

## Where

---

Where are your target markets located? Where do they hang out both physically and virtually? What is the best way to reach them in these locations?

Your answers to these questions will vary according to the type of target market you are looking for, and whether they are individuals, businesses, community groups etc.

Here are some examples for you to consider.

- Geographic location – where will you find them within a suburb, a town, a region, a country or the world?
- Places – what type of places do they frequent? Considering where they might work, live or spend recreational time. If in a business, where they might go to network, to learn, to relax, etc?
- Online – what platforms do they use? What is understood about their viewing habits?
- Communities – in which community groups do they participate?

Conducting research to better understand your target markets might be necessary.

Once you have identified where to find your target markets, you can work out how you will reach them – and which tools would be most effective.

Here are some examples of tools that might be relevant:

- Written communication – hard copy (such as flyers, postcards, letters, direct mail, etc)
- Digital communication (social media, emails, newsletters, website, blog etc)
- Videos
- Word of mouth (storytelling, public speaking, small groups)
- Visual communication (posters, signs, banners etc)

## Activity

---

	Our target market	Where to find them	Which tools to use
1	Local residents	Facebook Townhall	Video Poster
2			
3			

### *Case study examples*

---

Where we will find our target audiences:

	Our target market	Where to find them	Which tools to use
1	Businesses	In their businesses	Emails; face to face meetings
2	Agribusiness, farmers	In their businesses	Emails, face to face, public information meetings
3	Old Cootamundrans	Facebook, family and friend networks	Social media and word of mouth
4	Parents of school students	Things to do with school; school gate  Facebook	P&C meetings; school newsletters

## How

---

Once you have found and engaged your target market, how will they take up your offer?

Making this as simple and easy as possible will help to increase take up rates.

You will need to direct your audience to an offer application form and ensure they can read a copy of the disclosure statement and co-op rules before applying to take up the offer.

## Resources

---

Please check the [Community Investment for Co-operatives Handbook](#) to ensure that your co-op is meeting the regulatory requirements for your type of offer.

Some examples of how someone might take up your offer, depending on the type of promotion:

- Online promotion
  - a link to a page on your website that has clearly laid out information on what is involved in taking up the offer, with links to the disclosure statement and co-op rules
  - an online application form that captures all required information
- Hard copy promotion
  - a flyer/poster with information about the offer with information on how to access the disclosure statement and co-op rules
  - an application form with clear directions on how to lodge it

To consider:

- Communicating a clear timeline for how long the offer will be open
- Clearly stating what someone can expect once they have submitted an application form (consider the user experience, step by step – keep the process simple and easy)
- Outlining how their data will be managed by the co-op

Note: Offers under the Corporations Act crowdfunding provisions require the offeror to be available to answer questions during the offer period. Your co-op should do the same.

If the offer is a small-scale offer (one that is a continuing offer), then the founders should nominate a person who can be ready to answer questions. In a large, public offer, it is perhaps best done through establishing a Q and A online forum, so that investors can see other responses.

## Resources

---

The following are examples of offers/EOIs and might be useful examples in addition to the case studies provided.

This video outlines the history, vision, the fact that they need to raise funds to make it happen and their messaging highlights that you get to be a part owner and member. [Share Offer – Stretford Public Hall](#)

[This video](#) on [www.birchal.com](http://www.birchal.com) focusses on the value of Good Earth Dairy – Pure Australian Camel Milk product, the reputation and credibility and the business model. They talk about their investments to date, technology, intellectual property and previous crowdfunding campaigns and what they did with the money from previous campaigns. They also outline their intentions of what they will do with the money from this campaign but DO NOT mention financial returns. You may consider opening up an account on Birchal to see examples of videos used to promote offers.

## Activity

---

	<b>Our offer documents and application form will be accessible via the following options:</b>
1	
2	

## Case study examples

---

**How we will find our target audiences:**

	Our offer documents and application form will be accessible via the following options:
1	Hard copy – co-op office

	Our offer documents and application form will be accessible via the following options:
2	Website
3	Face to face
4	Business chamber office, council reception, Westpac, Information Centre
5	Email and messenger
6	Other stores

## Tips

---

### Logo

It is recommended that a professional develops your logo and branding with a detailed brief to ensure that it will be well received and trusted by your co-op's target audiences. The logo should be provided in different formats (eg. EPS, JPG, or PNG) and layouts (eg. horizontal vs stacked, full colour, black and white, or reversed out).

### Style guide

To ensure consistency, create a style guide which outlines how the logo will be used, the brand colours, the fonts, any tagline that is being used, written copy guidelines with examples of layouts and the types of images that should be used in collateral.

[This article](#) explains a style guide in detail. A style guide is also important to build your professional reputation, the more professional you look (cohesive and professional looking designs) the more trust you build. Trust means people will have confidence to complete a financial transaction.

### Creative software

Consider investing in software that supports creating quality digital and print collateral. [Canva](#) is an easy to use and affordable example. Once you have a logo and style guide, Canva has a Brand Kit section where the logo and any other elements, the fonts and colours can be added, so that whenever something is being designed, they are easily accessible.

### Educational resources

[Hubspot's](#) free educational resources offer excellent insights into all aspects of marketing and communications, from 'Social media for beginners' to 'Content marketing'.

## Website

Your website can be a simple one or two pages with a home page, a page about the project and how to get in contact. It must represent the message and vision you are trying to convey, but does not need to be complicated. Think of it as a contact tool – people may have heard about your project; how do they now find you to find out more? This is your home base of information and directions.

If you do have someone set up your website for you, make sure you are easily able to take over management of it. This may require some training. Platforms such as [Wordpress](#) and [Square Space](#) are user friendly.

## Launch event

Firstly, decide what is the point of your launch event? For example:

- Is it to broadcast that the project actually exists?
- Is it to share information with potential members, and educate them?
- Is it to create relationships that will support the project?

Your reasons for holding a launch event will help to decide the format as well as your budget. How do you want to deliver your launch event?

### In-person and/or online?

- Is it important to talk to people face to face and socialise?
- Do you need to connect with many people who are spread across a wide location, and perhaps cannot attend in person?

### Benefits of an in-person event include:

- Connecting with people in real life to create relationships
- Capturing contact information from attendees for future communications
- Ability to meet new people and tell your story authentically
- Answer questions easily and in the manner specifically needed
- Provide additional information to attendees directly
- Inspire people by location or in-place examples (take them to the project so they experience it firsthand)

### Risks of an in-person event:

- Can be more expensive than online
- Often more logistics and stakeholders to manage
- You need to have a compelling speaker or presenter to ensure the crowd remains engaged
- Some invitees may not be able to attend, how do you follow them up?
- People cancel last minute

### Benefits of an online event include:

- People can attend from many locations
- You can capture contact information from registrations
- Save money on venue hire, catering and other areas (although additional costs may be incurred for streaming platforms)

- You can record the chat questions for follow up, and use for your communications messaging as needed
- Guests can ask questions anonymously and avoid feeling self-conscious
- You can record the session for non-attendees and use it as promotional materials

#### **Risks of an online event:**

- Unstable connections and low technological literacy of attendees can inhibit involvement
- Costs for professional and reliable online streaming and meeting support
- Limited personal interactions and engagement, which may prevent connecting effectively
- All sales collateral needs to be distributed separately
- Difficult to 'read the room' on the success of your presentation

Maybe neither? A launch event can simply be the release of your co-op concept, fundraising campaign or key information. It can be the 'go-live' process of your website, and the link to sign up or pay your money.

#### **Printed materials**

If your co-op can't afford to pay a design agency, [Canva](#) can be used to create hard copy collateral. Printing can be expensive (and environmentally undesirable), so keep your hard copy printing to a minimum, and only print what you know you will use. Also think about, and budget for, co-op signage (both inside and out). This can be a significant cost, but is important for creating the right image and drawing customers in.

#### **Video**

Video is very engaging, but also very expensive to have done professionally. However, it can be an excellent sales tool, so may pay for itself in the longer term. The video should be carefully thought out, short (no longer than 2 mins) and exciting/fun.

Video can also be used to capture community opinions which support the vision for the co-op. These don't need to be professionally done, just provide a motivational message.

Once again, keep them short. [Canva](#) has basic video editing functionality so that you can prepare the video for publishing on your website and social channels.

**It is better to only do a few things but do them well.**

**Be realistic about the resources and time available to your co-op.**

# The Plan

---

## What you are doing when

This section maps out your strategy for marketing and promoting your offer. Essentially, these are your planned activities with a clear timeline and budget.

Taking the time to develop your messaging, branding and imagery first will make the development of the rest of your marketing activities much easier. The below staged approach to developing your marketing is recommended:

1. Content
2. Logo, branding and style guide
3. Photography
4. Website

Now you will have a consistent message and brand to apply to the following channels in order to target your potential members/investors:

- Social media
- Email marketing – [Mailchimp](#) is a user-friendly platform
- Flyers and posters
- Letters
- Videos
- Presentations

For each target market, activities are planned with the intention of taking the important messages to the audience, resulting in them taking up the offer.

Examples of activities may include:

### A launch event

- This might also include inviting key stakeholders, as identified in your business plan (for example politicians, local leaders and influencers etc)

### Social media

- Referring to the 'where' section to ensure you use the right platforms to reach your target audience
- Running a campaign across these different platforms

### Hard copy print

- Posters/brochures/flyers
- Referring to the 'where' section, pick the most appropriate format to communicate and share your offer promotional material. Via post/standing and handing out/flyers in shops, etc

A website

A video

Resources

Points 1-13 in [this article](#) give an overview of how to use Facebook effectively (the last nine are for bigger businesses)

[This is a guide](#) to social media aimed at smaller businesses.

## Activity

---

	Our activities will include the following:
1	
2	
3	

## *Case study examples*

---

Our activities will include the following:

1. Face to face – with a sales pitch and supporting materials
2. Information sheets
3. Posters
4. Social media – with scheduled weekly posts. Content ideas – progress updates; community members sharing why they are on board; number of people who have contributed so far etc. Acknowledging any major investors sharing their motivations.
5. Public Meetings
6. Letters to members – an opportunity to let them know that they can buy more shares whenever they want.

There can be multiple audiences, with each one having its own list of marketing activities and timelines. The following table provides a framework to manage the planning and rollout of these marketing activities, who will be responsible and how much it might cost, with deadlines, etc.

Note: Remember to check in against your offer goals as you start to implement your strategy. Some things might work better than others, so you will need to capture the take up data, to review and refine your marketing strategies as required.

Our Co-op Offer 1 \_\_\_\_\_

---

Deadline for completion	Marketing goal/target	The activity	Who is responsible	Budget
Date	Develop an image library	Photos that speak to the background and problem being solved. Images that speak to the vision and people taking up the offer.	Name	\$xxxx

*Case study examples*

<b>Deadline for completion</b>	<b>The goal/target</b>	<b>The activity</b>	<b>Who is responsible</b>	<b>Budget</b>
25 July	Gather and create content  Develop an image library	Top line messaging; voice of the community; messages from the team  Photos of the town, shops, empty shops, community members, co-op team members working on the project, 'I support the Coota Co-op' placard images, etc	Person 1	
25 July	Develop collateral	Poster/Info sheet/Website/PowerPoint presentation	Person 2	
1 August	Raise awareness of offer	Social media posts; distribution of posters and info sheets	Persons 1 and 2	
Mid-August	Potential members and investors will understand the offer	Public meetings/information sessions – at two local towns and two in town. PowerPoint.	Persons 3 and 4	
End August (half-way point)	Everyone will know about the offer – to make an informed decision to join and invest or not	Follow-up emails, radio interviews, TV stories, letter to members	Persons 2 and 5	
End September	At least \$600,000 raised	Take part in the Wattle Time Parade and Fair (11 September)	Person 1	

## Additional resources

---

### Online co-op resources

[Co-operative Foundations Module 4](#)

[Business plan template](#)

[Capital Builder](#)

[Co-op Builder](#)

[Community Investment for Co-operatives Handbook](#) – refer to Parts 3 and 4 for what is required for different types of offers.

### Examples of co-op websites providing access to forms and information:

- Distributing co-op membership information and link to membership form, rules and disclosure statement: [Join Hepburn Wind – Hepburn Wind](#)
- Distributing co-op membership information and link to rules and disclosure statement: [Membership – Hopsters Co-operative Brewery Limited](#)
- Non-distributing co-op (no disclosure statement required) online form for membership. Rules available on website. [Membership – Blue Mountains Food Co-op \(bmfoodcoop.org.au\)](#)
- Distributing co-op website directs membership inquiries to a staff contact. [Member Benefits – Geraldton Fishermen's Co-Operative \(brolos.com.au\)](#)

### Articles of interest

- [How to market community share issues? Insight from Triodos – Co-operative News \(thenews.coop\)](#)
- [Promoting offers | Co-operatives UK](#)

### Online tools

- [Canva](#)– All your design requirements n
- [Hubspot's](#) – Marketing/Comms advice
- [Wordpress](#)– Website building
- [Square Space](#) – Website building
- [Mailchimp](#) – Email marketing
- [SurveyMonkey](#) – data and feedback collection

Also: when in doubt, [Google](#) it! You'll be amazed at how many step-by-step guides there are available for just about anything.