



apexmanagement

& SPECIAL EVENTS

## Apex Management & Special Events, Inc. Case Study Service: *Marketing Development & Implementation*

### Situation:

A nonprofit client, whose mission focuses on patient services, public education and promoting awareness of a rare autoimmune disease to healthcare professionals, had three management changes in two years. The nonprofit's focus was tactical, simply getting through day to day operations, cleaning up files, duplicating Appeals – message and timing – producing a quarterly newsletter, among other things. Apex saw the need to examine the nonprofit from a broader, strategic perspective, working with the Nonprofit Board and its Medical Advisory Board to understand its current situation and short term history to refine stated goals and develop new ones, consistent with its members'/patients' needs. One aspect of this strategic review was the development of a Programs/Marketing Plan.

### Solution:

Apex conducted a member survey asking about services offered by the nonprofit. Seventy five percent of the survey sample was determined to be active or very active members/patients. The remainder of the sample was lapsed or inactive. The survey results guided the program planning. Three major challenges, related to programs, emerged.

- **Education of healthcare professionals.** The disease is frequently undiagnosed or misdiagnosed, resulting in long periods of non treatment or incorrect treatment of patients.
- **Public education and awareness.** The general public does not know about the disease and does not understand the day to day challenges faced by patients. This affects them at home and in the workplace.
- **Quality of Life.** The disease manifests itself differently in every patient and symptom changes can occur daily, weekly, yearly, even hourly. Services need to be expanded to accommodate different phases of the disease.

As Apex examined the survey results, we determined that our focus must be on measurable impact, not increased activity. For example, if we mailed 20% more physician packets, what was the positive change in patients' lives? Was time to diagnoses shortened? By how much? How did the information provided translate into measurable action that benefited an individual? It was also clear that desired programs and the ability to measure them does not necessarily equal current resources. Therefore, it would be necessary for the Board to prioritize. Finally, the expected outcome of successful programs is an increase in donor contributions, enabling the nonprofit to increase programs.

Several existing programs were identified for expansion and new programs were identified and are in various stages of research and implementation.

### Benefits

- Nonprofit Board, Medical Advisory Board, staff and volunteers moved from an almost exclusive tactical mode to a bigger picture, strategic mode.
- Marketing / program goals are clarified and prioritized, eliminating staff hours on isolated and unrelated projects
- Overall plan shows interconnection of some program pieces between professional education, public awareness and patient services, saving development time.