



# Commercial Planning Template

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# Introduction

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The objective of commercial planning is to ensure a consistent and standard analysis of product development, sales and marketing, business development and digital plans within an organisation.

Commercial planning includes:

- ▶ Value proposition development
- ▶ Addressable market
- ▶ Income projections
- ▶ Cross selling / up selling opportunities
- ▶ Go-to-market strategies
- ▶ Identifying and addressing income risk and gaps

The critical element is the planning. By undertaking comprehensive commercial planning, we can significantly increase the chances of achieving sustainable income growth.

The following template is provided for you to populate with your own analysis and action planning which can then be used for communication and stakeholder engagement.

# Background

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UK membership organisations are facing flat subscription revenues, rising delivery costs and, post-pandemic, a donor landscape that is 25% more challenging.

Trade union membership is broadly in decline and many membership organisations remain dependent on subscriptions, in spite of this often being lower-value, lower-margin income.

In 2022, Memberwise reported that for large professional bodies, 50-60% of income is from membership fees.

Many trustee boards ask, 'Can we go commercial without losing our soul?' We believe the answer is not only a resounding 'yes' when strategy, culture and evidence-based messaging work together, it is a resounding 'you have no choice' for many, as the landscape for membership and non-profits is set to remain challenging for the foreseeable future.

Given this landscape, we can conclude that many membership organisations face ongoing challenges with income generation. Many have already diversified income to some degree, but for many, this feels like filling a bucket with a hole in the bottom. Our best efforts still see income leaking away in the form of stubbornly high attrition and stubbornly low new customer acquisition.

There are complex and multi-faceted challenges facing those organisations that need to grow and diversify income. In addition to the macro-economic challenges facing the UK as well as globally, such as national insurance increases and import levies, there are also specific sector-based challenges such as:

**Membership Value Perception** and ROI Challenges. Many are finding it difficult to demonstrate tangible benefits to its members, coupled with competition from alternative resources: the rise of free or low-cost online communities, industry forums, social media groups, and training platforms that can diminish the perceived need for a paid membership.

**Market Saturation and Member Fatigue.** Some professionals belonging to multiple bodies already.

**Rising Operational and Technological Costs.**

Growing expectations around data protection (**GDPR compliance, cybersecurity**) can lead to higher overhead. Increased costs to maintain compliance can dampen net income growth.

**Evolving Member Demographics** and Preferences. Younger professionals often wanting flexible, on-demand, and digital-first services.

**Dependency on Grants or Government Support.** Some membership organisations (especially in the voluntary/community sector) rely on grants or public sector funding, which can be subject to cuts or policy shifts, hampering overall income stability.

**Competitive Pressures in Training and Certification** with the proliferation of Private Training Providers: and Price Sensitivity in Online Learning.

Finally, **Staff Capacity and Skills Gaps** is a major challenge in the sector with limited digital engagement skills that are essential to effectively grow membership revenue.

The three recurring challenges that surface in every boardroom we support are:

- 1 Cultural resistance - commercial can sound 'dirty' or 'corporate'.
- 2 Capability gaps - few staff are trained in value-based marketing and selling.
- 3 Fragmented digital infrastructure - without data you cannot price, target or prove value.

## Identifying Barriers & Shifting Mindsets

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One of the biggest barriers we have encountered is the notion that being 'commercial' conflicts with mission-driven goals. Becoming more commercial does not have to mean losing sight of your values. Instead, it is about being sustainable, innovative, and responsive.

The most common causes of misalignment and resistance to commercial strategies are:

- ▶ **Resistance from staff or leadership who see income generation as conflicting with the organisation's values.**
- ▶ **Lack of clarity on how commercial activities align with membership goals.**
- ▶ **Limited internal capacity or skills for business development.**

Shifting to a more entrepreneurial mindset often requires reframing 'selling' as 'problem-solving' and 'value-adding' for members.

Important mindset shift: commercial strategy is not about maximising profit at any cost; it is about maximising impact through disciplined income generation. For membership bodies and non-profits that means:

- 1 Turning expertise into scalable products,
- 2 Pricing for sustainability, and
- 3 Reinvesting surplus into member value and social outcomes.

# What is Commercial Planning?

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In simple terms, we think of commercial strategy as the bridge connecting your ‘why’ to your ‘how’. If we break this down further:

- ▶ Product strategy defines ‘what’ you sell and ‘why’ it matters.
- ▶ Marketing and sales/business development strategy decides ‘where’ and ‘how’ you reach buyers.
- ▶ Digital strategy supplies the platforms and data that make scale possible.

Together they form your commercial roadmap:



# How Do I Develop a Commercial Strategy and Plan?

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There are several essential steps when developing your commercial strategy.

Commercial strategy and planning is a cyclical process that begins with analysis of your current landscape, together with the opportunities you perceive.

It then moves into product development – thinking about what you offer to your customers and why this matters. At this stage we are thinking about what products our audience would value from us, the potential cost of customer acquisition and the potential return on investment.

We then move onto the commercial plan – how we intend to take those products to market and at what cost to our audience, together with income projections, target and objective setting and marketing plans?

At the execution stage, we are thinking about customer onboarding, customer engagement plans, and the operational delivery of our products.

The measurement stage is absolutely crucial because measuring the right things tells us whether our plan is succeeding or whether we need to adapt and improve. Measurement includes all stages of the commercial process and includes:

- ▶ Demand generation – to what extent are our marketing strategies delivering the level of leads and opportunities we need to build the pipeline?
- ▶ Customer acquisition – to what extent are we converting leads and opportunities into new customers?
- ▶ Demand fulfilment – to what extent are we able to onboard customers at the customer acquisition cost we predicted?
- ▶ Customer engagement – to what extent are our customers satisfied with the products and services we provide? How engaged are they? Are they advocating for our organisation?

Finally, in the improve and expand stage we are assessing the results of our commercial activities, comparing these with the expected results and using this data to determine whether we are in a position to scale our commercial activities (because the indicators confirm that the results are achieving or exceeding expectations), or pivot/pause (because the results we are achieving are not meeting expectations).

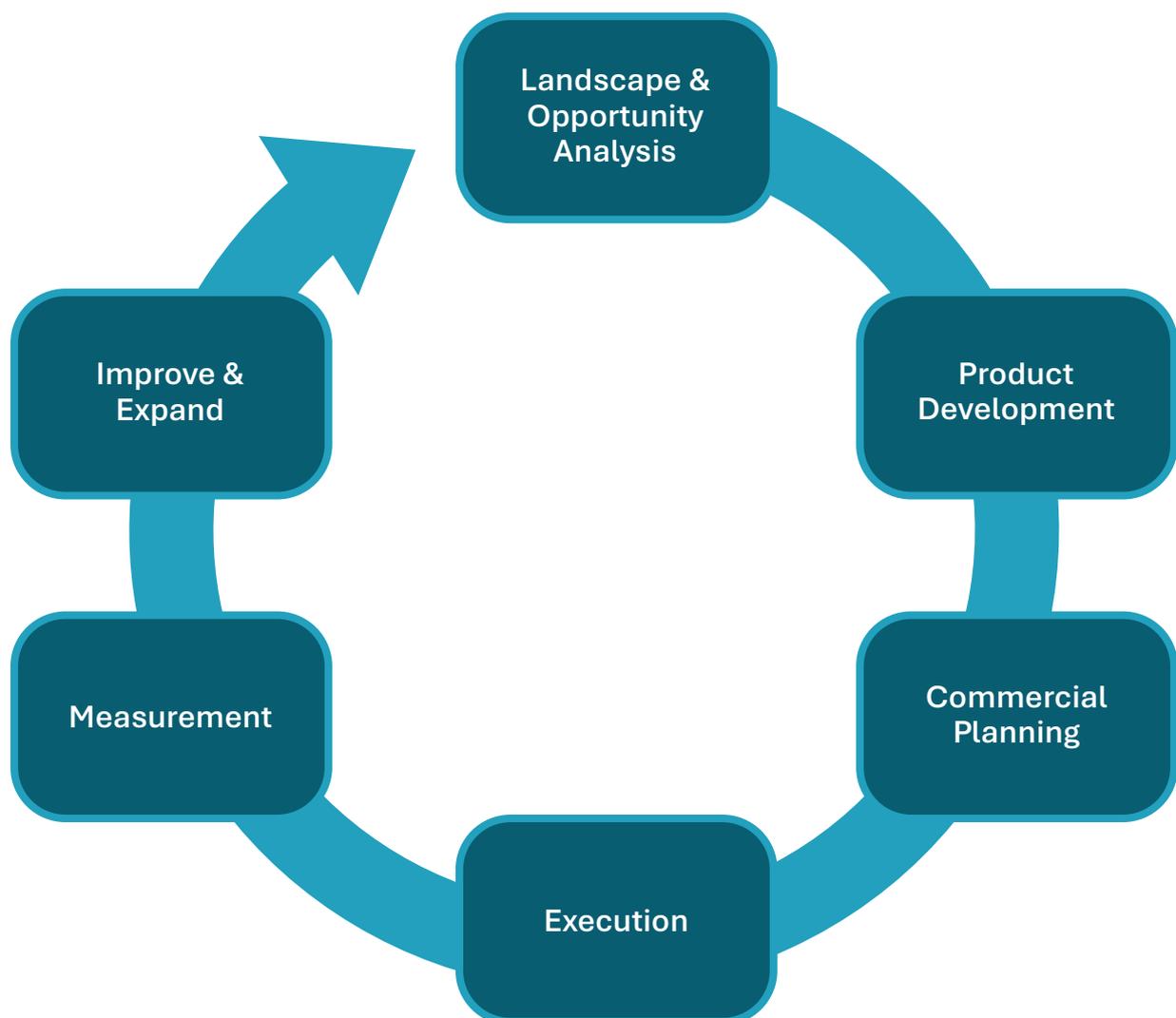


Figure (1) The Commercial Strategy and Planning Cycle

# Member/Audience Led Value Proposition

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Everything starts with a sharp, evidence-based value proposition: ‘Who exactly is our audience, what pain point do we solve, and why should they take action now?’

Your proposition should be member-centred first, revenue-enabled second.

Your value proposition must resonate deeply and align authentically with members' needs and expectations, helping them clearly see your organisation's unique value.

We reflect that many membership organisations do not synthesise feedback from multiple sources to develop a deep understanding of member’s problems, experiences and opportunities in order to capitalise on them, nor do they do this on a continuous basis.

Here are some example value-proposition examples from the professional membership sector. Each includes the core line they lead with and why it works:

## CIPD – Chartered Institute of Personnel & Development

“Championing better work and working lives.”

**Outcome first** (“better work and working lives”) and an action verb (“Championing”) position CIPD as an advocate, not just a service provider, for HR and people professionals.

## IET – Institution of Engineering & Technology

“Together we are engineering a better world.”

Combines a **collaborative cue** (“Together”) with a **mission-level benefit** (“a better world”), signalling that membership advances both the individual engineer and society at large.

## ICAEW – Institute of Chartered Accountants in England & Wales

As a global professional body for chartered accountants, we ensure our members have the knowledge and values to help build local and global economies that are sustainable, accountable and fair.”

Spells out **who it is for** (chartered accountants), the **unique resource** (knowledge + values) and a **bigger-purpose payoff** (strong, fair, sustainable economies).

## What these have in common

**Clear beneficiary** – each statement names or implies the professional community it serves.

**Outcome or purpose front-and-centre** – not “what we offer” but “what changes because we exist.”

**Credibility signals** – global scope (ICAEW), collective action (“Together” at IET) or a decade-long advocacy record (CIPD).

## Developing Your Commercial Strategy

Strategy only lives when it turns into an action plan with owners, metrics and quick wins. We recommend initially prioritising ‘repurpose over invent’. Following a three-step playbook will ensure you develop a comprehensive and robust strategy and plan:

- 1 Audience and insight** – qualitative and quantitative research to surface unmet needs amongst your target audience(s).
- 2 Staff engagement** – co-create value propositions to erode resistance and draw in subject matter expertise.
- 3 Product and go-to-market** – bundle existing expertise into scalable offers (re-purpose what you already have in a way that appeals to new markets/audiences).



Figure (2) The three step approach to developing your commercial strategy

Having a strategy is just the start; implementation is critical. Translate your strategy into actionable, measurable steps. Assign clear responsibilities, timelines, and success indicators. This is the cornerstone of effective commercialisation.

**Align Targets and Activities:** Create a plan that explicitly shows **how** your organisation will meet its income targets. This should detail the exact amount of income to be generated, the markets or segments being targeted, and the responsibilities for staff or departments, ideally underpinned with financial and non-financial targets across the organisation – not just the responsibility of direct income generators such as business development or fundraising teams.

**Integrate with Membership Strategy:** Ensure that commercial goals fit naturally with your membership goals, so everyone, from marketing to business development to membership service delivery, pulls in the same direction.

## Buy in is Crucial to Success

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Remember that change sticks when people see and feel success. Celebrate early wins - first contract signed, first member upgraded, and communicate relentlessly, relating the results back to how this supports your mission.

Organisations thrive commercially when they balance mission-driven values with disciplined planning, strong messaging, and continuous cultural reinforcement. By defining a clear commercial strategy, articulating a strong member-centric value proposition, and ensuring the right processes and training are in place, membership organisations can generate sustainable income streams while remaining true to their core purpose.

We recommend you:

- ▶ **Provide initial as well as ongoing training, support, and real examples of how a more entrepreneurial approach benefits members and the broader mission.**
- ▶ **Identify staff who are open to new income approaches and let them model success for others.**
- ▶ **Reframe 'Commercial' as Mission-Aligned: Position income-generation as a way to enhance member value, not as purely profit-driven.**
- ▶ **Set Clear Roles & Targets: Define individual and team-level goals (e.g., 50% based on membership growth, 50% on new commercial partnerships) to incentivise balanced performance.**
- ▶ **Empower Managers: Managers should actively mentor and coach staff on commercial best practices. This fosters a culture of continuous improvement.**
- ▶ **Start with the end in mind – and stick to it.**

Finally, it goes without saying but it is vital to understand and be clear about where you want to be. It is so easy to get distracted with day-to-day problems, and it is to be expected, but keep reminding yourself – and your people, where you are heading. Make it really clear and keep it simple.

Here are our top tips for developing your commercial strategy and plan.

## 1 Get great advice.

It can feel like failure to get advice. It is natural to think, especially when you are in a senior position, that you need to know all the answers. But that is not true. Membership organisations are very complex, and you do yourself and your membership a dis-service if you do not look outside for a better understanding of what good looks like and how to get there easier, faster and better.

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## 2 From experts.

When looking for advice, go to the right place. Understanding of the membership sector is really important, as well as broader commercial knowledge in our case. We made good use of interims for a period of time to help accelerate our journey with the right skills and embedded them into our organisation. You may want to consider this approach, or at least, find an expert or experts that understand what it is like to face into the challenges membership organisations experience and have track record in solving them.

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## 3 Be open and transparent wherever and whenever you can.

It can be hard to level with your team, especially if the outlook is less than positive and you need to make big changes. The earlier you can bring people into that conversation and the more open you can be the better. People find uncertainty really hard to cope with, so again, being clear on where you need to get to and engaging people in how you are going to get there will really help to bring people along on the journey with you.

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## 4 It takes time – and that is OK.

Transformation doesn't happen overnight. It always takes longer than you think. As long as you are moving forward, focused on your target state, you will get there.

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## 5 Dedicate the resource.

You cannot expect your people to deliver transformation alongside the day job. Make sure you have dedicated resources, with the right skills sets to lead and coach the wider staff team.

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## 6 Do not try to do everything all at once.

We delivered a phenomenal amount of change between Q1 2023 and now, and we're still going. Big transformation pieces from membership and commercial strategy to digital transformation and restructuring. We've made mistakes along the way and we're still learning. The more moving parts you have, the more difficult it is to manage so I'd recommend tackling any change programme with a systematic approach, achieving results before moving into the next phase.

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## 7 Lean into data and facts – not anecdotes and opinions.

Well-meaning colleagues presenting opinions as fact can lead you down a rabbit hole. It can mean wasted time on something you would not have done if you had taken the time to review the data. It comes from a good place but make sure that before you make decisions, you know what the basis is, and it is rooted in facts that can be proven with data. If you cannot get the data – get the data, even if it means taking longer. You will save time in the long run.

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## 8 Hold your nerve.

If you are transforming an organisation, I guarantee you will experience varying degrees of resistance. Change is stressful for most people. It comes from a place of fear, and it is to be expected. It can cause us to want to back off and restore the status quo. It is essential to remember that it is the status quo that is the biggest threat to any change programme. If you are communicating often and openly, you can counter some, but not all of this. Do not try – hold your nerve and keep going.

- ▶ **Remember – it is all about the people (and processes and technology, but mostly the people).**

Finally, organisations transform when people transform. Strong, consistent leadership, underpinned by effective management are key to success. With your people alongside you, anything can be transformed. But people can also be the biggest reason for failure, with change resistance, or even just change inertia, being the top reasons for failure. For people to be engaged in change they need to:

- 1 Know where you are heading and feel positive about that.
- 2 Feel dissatisfied with the status quo.
- 3 Be involved with defining how you are going to get there.
- 4 Know what the immediate next steps are that they need to take.

We hope you find the pages in this template useful in developing your commercial strategy and plan.

# Landscape Analysis

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## Mission and Background

*In this section, give context as to why your organisation exists. Cover your mission statement, vision statement, and a brief history for readers to understand the context of the organisation and its charitable, membership and public benefit interests.*

## Mission Statement

*[Enter your membership organisation's mission statement].*

## Vision Statement

*[Enter your membership organisation's vision statement].*

## Membership organisation History/Story

*[Enter your membership organisation's story and/or abridged history].*

## Commercial Strategy Drivers

In this section, discuss what the key drivers are for your commercial strategy. This could include such considerations as:

- ▶ **The need to generate additional income to fund other strategic objectives you need to achieve.**
- ▶ **The organisation's cost base is out of line with its income and therefore income needs to grow to align with costs.**
- ▶ **You have capital investment projects that need additional funding such as investment in new technologies.**
- ▶ **You need to rebuild your reserves following a period of investment.**

# Commercial Opportunity Analysis

## Target Markets – Macro

*In this section, talk about who your products or services are aimed towards. Identify your key prospect attributes your ICP – Ideal Customer Profile), who should be excluded from business development activities and why, and the regions or territories you want to target and why.*

## Locations/Territories Targeting

Identify the physical location of your target market. If you are a global membership organisation, identify your strategy for whichever locations take precedence (if any) and what your global strategy is. If you are a region-based membership organisation, explain why.

## Buyer Personas

Who are you targeting? Buyer personas (persona mapping) are semi-fictional representations of your ideal customer based on market research and real data about your existing customers. Outline these ideal customer personas here.

Here is a sample buyer persona template you can use.

## Full Member: CEO



FULL MEMBER  
CEO

### ABOUT

Responsible for leading organisation. Public figure. Accountable to trustees. Cost and business management.

### NEEDS

Quick accessible information. Opportunities to talk to other CEOs. Access to policies. Information on quality standards.

### PAIN POINTS

Career support does not support career stage. Limited time for professional development. Responsible for delivering lots of change without necessary skills. Poor access to data and insights. Tension and conflict with Board.

### DEMOGRAPHIC

- Older
- Strategic
- No time

### GOALS

- Accessibility
- Quality standards, funding, policies, interest in best practice
- Networking and peer support
- Career development

### Personality

- Tactician Strategist
- Follower Influencer
- Governance complier Framework creator
- Low stress tolerance Resilient
- Risk averse Entrepreneur
- Lives in the present Visionary

Persona mapping converts audience data into concise, human-centred profiles that embody the attitudes, objectives and challenges of a real segment. By referring to a specific character, such as *Sofia, the Cost-Conscious Buyer* or *Ravi, the Innovation-Focused Chief Executive*, teams will base decisions on clear user insight rather than abstract assumptions.

## Methodology

### 1 Gather Evidence

Combine qualitative research (interviews, observation, social analysis) with quantitative indicators (usage analytics, NPS, market surveys).

### 2 Segment by Motivation, not Demographics

Group individuals according to shared needs, behaviours or jobs to be done; age or job title is relevant only when it influences choices.

### 3 Draft the Persona Card (template above)

Assign each segment a name, a single-sentence purpose, three primary goals, key frustrations and a representative quotation that captures mindset.

### 4 Validate with Stakeholders

Circulate early drafts to sales, support and senior leaders; refine until the personas feel immediately recognisable to those who work with customers.

### 5 Embed in Everyday Workflows

Attach personas to journey maps, objectives and feature briefs so that they guide daily trade-offs and prioritisation discussions.

### 6 Maintain as a Living Document

Schedule regular reviews, at least annually or when market conditions shift. Retire outdated personas, merge overlaps and create new profiles as patterns evolve.

## Target Markets – Macro

*In this section, talk about who your products or services are aimed towards. Identify your key prospect attributes, your ICP (Ideal Customer Profile), who should be excluded from business development activities and why, and the regions or territories you want to target and why.*

## Omissions

To succeed, it is just as important to know who not to target as it is to know who to target. Outline the people, businesses, and/or buyers who are unqualified to pursue as prospects and why.

## Customer Experience

What are the customers' perceptions and experience with your organisation or brand? Customer experience includes every interaction they have with you - from navigating your website to talking with your customer service team.

Describe your customer journey, including the touch points and communication channels they use to discover products, make purchases, and reach out to support teams.

# Market Conditions

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## Positioning

*In this section, think about your place in your industry. Anyone reading this part of the plan should know what your strengths, weaknesses, and comparisons to competing organisations are.*

## Market Conditions

*Speak to the market conditions in the industry. How is your industry performing in general? It could also be beneficial to run a SWOT Analysis.*

*Refer to these resources:*

- ▶ [How to run a competitive market analysis | Miro Blog](#)
- ▶ [Template here - SWOT Analysis Template & Examples | Miro](#)

## Value Proposition

*Describe, in general, what benefit your organisation, product, or service offers that would make someone want to become a customer? Identify the problem to which you are the solution.*

## Pricing Strategy

*What is your pricing strategy and how was it developed?*

## Marketplace Risks

*Identify the risks in your marketplace or industry. This could be a strategic risk, compliance and regulatory risk, financial risk, or operational risk.*

## Competitive Advantages

*What makes your organisation unique and comparatively stronger than competitors? What do you offer that no other membership organisation, product, or service does, or does as well?*

## Competitor Analysis

*List your top competitors as well as the following information for each competitor:*

- ▶ **Comparative Strength** – what are your membership organisation’s assets that this competitor does not have?
- ▶ **Comparative Weakness** – in what areas or attributes do your competitors outperform you?
- ▶ **Counterpoints** – if a comparative weakness is recognised, which counter arguments can be used to address those weaknesses?

## New Market Opportunities

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In this section, identify the new market opportunities that your business can expand into. This could be growing into a vertical industry or segment, possible new product lines, exploring new channels, or targeting different consumer niches.

Explore the potential opportunities and ROI, including risks, dependencies, issues and recommended next steps.

# Fiscal Analysis - Macro

Complete the table below to provide a macro level overview of the commercial strategy.

Overview	Description
<b>Target Market</b>	Which high-level markets are you targeting? For example, UK-and Europe-based professionals working in pharmaceuticals.
<b>Territory Strategic Goal</b>	What are you trying to achieve overall? For example, to increase market penetration from 20% to 45% within 3 years.
<b>Target</b>	Year 1 – incremental income of £150,000
	Year 2 – incremental income of £250,000
	Year 3 – incremental income of £500,000
<b>Pipeline coverage required to achieve target</b>	Pipeline coverage is the total value of the sales ‘pipe’ needed to achieve the income target. The industry standard suggests a ratio of 10 leads to every 1 opportunity and 4 opportunities to every 1 sale; however, this may differ for your chosen target.
<b>Average pipeline duration</b>	This is the amount of time expected to take from opportunity identification to customer converted. This is important because the length of the sales process directly affects when you will expect to receipt income.
<b>Conversion ratio MQL to SQL</b>	Typical industry standard is 10:1.
<b>Conversion ratio SQL to contract</b>	Typical industry standard is 4:1.

# Fiscal Analysis - Macro

Opportunity focus	Who are we targeting?	With what products/services?	What £ sales pipeline is needed to secure target?	What is the opportunity? How will we message it?	What is the plan?
<b>Opportunity 1</b>	Audience description(s)/ persona(s)		£value (target x4)	Marketing message(s)	Marketing campaign plan(s)
<b>Opportunity 2</b>	Audience description(s)/ persona(s)		£value (target x4)	Marketing message(s)	Marketing campaign plan(s)
<b>Opportunity 3</b>	Audience description(s)/ persona(s)		£value (target x4)	Marketing message(s)	Marketing campaign plan(s)
<b>Opportunity 4</b>	Audience description(s)/ persona(s)		£value (target x4)	Marketing message(s)	Marketing campaign plan(s)
<b>Opportunity 5</b>	Audience description(s)/ persona(s)		£value (target x4)	Marketing message(s)	Marketing campaign plan(s)
<b>Opportunity 6</b>	Audience description(s)/ persona(s)		£value (target x4)	Marketing message(s)	Marketing campaign plan(s)

# Demand Fulfilment Plan

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In this section capture the customer onboarding plan for each area of the commercial plan.

## 1 Define a clear value proposition

Articulate the immediate benefits a new member or supporter should feel within the first week.

Align welcome messaging, benefits activation, and early engagement tasks to that value.

## 2 Map the end-to-end journey

Capture every touchpoint from joining to “first success” (e.g. accessing member resources or booking an event).

Identify any hand-offs between teams (marketing, finance, customer services) and set service-level agreements to avoid delays.

## 3 Segment and personalise

Segment new joiners by profile (e.g. individual, corporate, student) and intent (networking, professional development, cause driven).

Tailor content journeys, onboarding emails, and recommended actions accordingly. Personalisation improves early engagement and reduces churn.

## 4 Create a 90-day onboarding programme

Week 1: Welcome email, log-in details, quick-start guide, and a personal thank you from a senior leader or volunteer.

Weeks 2-4: Introduce core benefits and invite the member to take one high-value action (join a group, complete a profile, or register for an event).

Weeks 5-12: Provide deeper resources, highlight success stories, and invite feedback to refine the experience.

## 5 Automate wherever practical

Use your CRM to trigger personalised journeys, reminders, and NPS surveys automatically.

Pre-populate forms with known data to minimise effort for the member.

Integrate finance and communications systems so payment confirmation triggers “day-one” onboarding.

## **6 Set measurable onboarding KPIs**

Activation rate within 14 days (member logs in or attends first event).

Completion of profile or first key action within 30 days.

Net Promoter Score at day 30.

Cost per onboarded member versus lifetime value projection.

## **7 Provide multi-channel support**

Offer live chat, knowledge-based articles, and a staffed helpline during working hours.

Signpost office hours or volunteer mentors who can answer questions for more complex memberships.

## **8 Embed two-way feedback**

Survey new members after 30 and 90 days. Keep it short, three to five questions focused on clarity, speed, and perceived value.

Use insights to refine email copy, resource placement, and process bottlenecks.

## **9 Ensure governance and compliance**

Confirm GDPR consent models are built into forms and communications.

Provide transparency on data usage and privacy, reinforcing trust at the earliest stage.

## **10 Plan for continuous improvement**

Review onboarding analytics monthly, share a concise dashboard with leadership, and prioritise one improvement per quarter.

Hold a cross-functional retro every six months to capture lessons learned and update the onboarding playbook.

Including these points in your commercial planning template will guide senior leaders to design an onboarding plan that enhances member satisfaction, drives early engagement, and delivers a solid return on acquisition spend.

# Customer Engagement Plan

In this section capture the customer engagement plan for each area of the commercial plan.

Use this section to map how you will engage customers (members, donors, event delegates, partners) across every strand of the commercial plan. Copy the framework into your document and complete one line per activity.

Commercial area	Engagement objective	Target segment	Core message or offer	Channels	Cadence	Owner	Success metric
<b>Membership acquisition</b>	Convert prospect to member	Early-career professionals	“Join today and get instant access to CPD resources”	Email nurture, LinkedIn ads, webinar	4-touch sequence over 14 days	Marketing Manager	Join rate ≥ 15 %
<b>Onboarding</b>	Drive first-month engagement	New individual members	“Complete your profile to unlock tailored content”	Automated emails, in-app prompts	Day 1, 3, 7, 14	Member Services Lead	Activation rate ≥ 70%
<b>Retention</b>	Renew expiring members	All members at 90 days pre-renewal	“Stay connected to keep your professional edge”	Renewal email series, SMS reminder, phone call	3 emails + 1 SMS + 1 call	Retention Executive	Renewal rate ≥ 88 %
<b>Events and training sales</b>	Upsell paid courses	Mid-career members	“Secure your place on our advanced qualification”	Personalised email, website banner, social posts	Monthly push in peak season	Product Owner	Course bookings per email > 200
<b>Corporate partnerships</b>	Deepen partner value	Platinum sponsors	“Let’s co-create white papers for sector influence”	Account review meeting, briefing pack	Quarterly	Partnership Manager	Contract uplift ≥ 10 %
<b>Donations</b>	Increase average gift	Lapsed donors	“Your support will fund five bursaries this year”	Direct mail, email, telephone	Bi-annual appeal	Fundraising Officer	Average gift ≥ £60
<b>Advocacy</b>	Turn members into ambassadors	High-NPS members	“Refer a colleague and receive a free event ticket”	Referral platform, social toolkit	Always-on	Community Manager	Referrals per ambassador ≥ 2

## How to use the table

- 1 Commercial area** – reference the line items in your commercial plan (e.g. membership growth, event income, partnerships).
- 2 Engagement objective** – define the specific behavioural outcome you are seeking (e.g. join, renew, attend, donate).
- 3 Target segment** – be as granular as possible so that messaging feels relevant.
- 4 Core message or offer** – distil the single idea or benefit that will resonate with the segment.
- 5 Channels** – list the primary touchpoints (email, phone, LinkedIn, SMS, in-app, direct mail, face-to-face).
- 6 Cadence** – specify timing and sequence to avoid over-communication while maintaining momentum.
- 7 Owner** – assign accountability to a named role, not a team.
- 8 Success metric** – choose one leading or lagging indicator that links directly to revenue or retention.

## Good practice pointers

- ▶ **Segment before you broadcast:** use CRM data to suppress messages that are not relevant and to trigger the next step based on behaviour.
- ▶ **Keep copy concise:** front-load benefits and make the call to action obvious. One email, one call to action.
- ▶ **Test and learn:** A/B test subject lines, send times and creative. Iterate monthly and record learnings in a playbook.
- ▶ **Close the loop:** feed engagement data back into finance and forecasting models so that commercial performance reports are always current.
- ▶ **Governance:** publish an engagement calendar so that teams can see every planned action in one view and avoid clashes or fatigue.

Add this table and guidance to your template so that each work-stream lead documents a robust, measurable engagement plan aligned to the overall commercial objectives.

# Additional Guidance for Senior Leaders

## Executive Summary Template

Use this one-page summary to brief the board on the commercial plan. Summarise the strategic context, the commercial ambition, the key levers for success, the principal risks, and the decisions required. Limit the section to 300 words so that leaders can absorb it quickly.

## Key Success Metrics and KPIs

Track a balanced set of indicators covering acquisition, retention, engagement, and efficiency. The sample table below illustrates a starting point.

Metric	Definition	Target	Data source
<b>Membership growth rate</b>	Year-on-year percentage increase in active members	5% per annum	CRM dashboard
<b>Average revenue per member</b>	Total earned income divided by number of members	£225 per member	Finance system
<b>Customer acquisition cost</b>	Marketing and sales spend per new member	≤ £75	Marketing budget tracker
<b>Net Promoter Score</b>	Member willingness to recommend on a scale of – 100 to 100	≥ +35	Quarterly survey

## Scenario-Based Financial Modelling

Build best, expected, and cautious cases that stress test price, volume, and cost assumptions. Model cash flow as well as income so that you understand when cash is received, not only when revenue is recognised.

## Capability and Resource Planning

Create a skills matrix that lists the expertise required to deliver the plan and maps current capacity against need. Identify gaps in areas such as digital marketing, partnership sales, product management, and data analysis. Plan how to close the gaps through recruitment, up-skilling, or outsourcing.

## Governance and Decision Making

Adopt a stage-gate process with clear entry and exit criteria. Recommended gates: Discovery, Business Case, Pilot, Scale, and Review. Assign decision rights in a RACI matrix so that accountability is clear.

## Risk Management and Mitigation

Maintain a live risk register. An example format is provided below.

Risk	Probability	Impact	Mitigation
Lower than expected take-up	Medium	High	Phase launch and adjust marketing spend quickly
Data quality issues	High	Medium	Implement data-governance procedures early
Skills shortage	Low	High	Secure interim expertise and build a training plan

## Stakeholder Engagement and Communications Plan

Map stakeholders by influence and interest. Create a communications schedule that specifies audience, message, channel, and timing. Prioritise trustees, senior volunteers, and key external partners.

## Implementation Roadmap

Set out activities over a 24-month horizon, broken into 90-day blocks with clear milestones. Highlight quick wins in the first six months to build momentum.

## Data, Insight, and Reporting

Define the single version of the truth for each key metric. Build a dashboard that refreshes automatically and is visible to all departments. Schedule a monthly insight review to translate data into action.

## Sustainability and Social Impact Measures

Capture how commercial growth funds social outcomes. Include indicators such as scholarships awarded, community projects supported, or carbon emissions saved.

## Glossary of Key Terms

- ▶ **ARPU** - Average revenue per user (or member)
- ▶ **CAC** - Customer acquisition cost
- ▶ **LTV** - Lifetime value
- ▶ **Churn** - Percentage of members who leave in a given period
- ▶ **Pipeline coverage** - Ratio of open opportunities to target income