Finish Strong. Start Strong.

Before the year wraps up, schedule a three-hour meeting with the people involved in your organization's marketing. That might be your executive director, social media manager, advancement director, or whoever helps guide your outreach and communications. Set the meeting two to three weeks out so everyone has time to gather what they need.

Your three-hour meeting:

- Marketing Results (30-60 mins)
- Social Media Review (30-60 mins)
- Website Review (30-60 mins)
- Use any remaining time to agree on priorities, owners, and follow-up dates.

Marketing

Start with your organizational goals, not a list of marketing activities. Whether your focus is reaching more women, increasing appointments, strengthening donor relationships, or growing giving, the question is the same: Did your marketing help you make progress?

Look at the evidence:

- What did we hope to accomplish this year?
- What changed? Consider inquiries, appointments, giving, engagement, or other outcomes that matter to your mission.
- What do our reports tell us—and what can't they tell us?

Talk it through:

- Where did we see real progress? Where did we fall short?
- Were our goals and expectations clear to the person or team managing our marketing?
- Did we communicate changes in our priorities throughout the year?
- What do we want to accomplish next year, and how will we know we're getting there?

Keep in mind: More traffic, clicks, or impressions can be encouraging, but they aren't the same as achieving an organizational goal. Look at what those numbers led to.

If you work with an outside marketing partner, have this conversation internally first. Then bring your questions, concerns, successes, and new opportunities to that partner. Sometimes the strategy needs to change; sometimes the missing piece is clearer communication.

Social Media

Pull up your social media insights and take a look at the posts that performed best this year. Don't limit yourself to the posts with the most likes. Consider reach, shares, comments, clicks, and any actions that matter to your organization.

Take a look at:

- Your five strongest posts and a few that didn't land as expected.
- The topics, formats, and messages that seemed to resonate.
- How client-focused content performed compared with supporter-focused content, if you serve both audiences.

Talk it through:

- What did our strongest posts have in common?
- Did the content reach the people we actually wanted to reach?
- Which posts encouraged meaningful action, not just engagement?
- What should we keep doing, try differently, or stop doing next year?

Keep in mind: A popular post isn't automatically an effective post. A smaller audience taking a meaningful next step may matter much more than a large number of views. Before moving on, choose one or two things to carry into next year's content plan.

Website(s)

Open your website and walk through it as if you were visiting for the first time. Check it on your phone, too. Some updates are simple enough to make right then and there; go ahead and handle those if you can.

Check the essentials:

- Hours, locations, contact information, team information, and services.
- Appointment requests, contact forms, donation options, buttons, and important links.
- Outdated events, old campaigns, and language that no longer reflects how you talk about your work.

Then look a little deeper:

- Have we added services, programs, or opportunities that aren't represented well?
- Are we speaking to clients and supporters in ways that address their needs and encourage them to take the next step?
- Are we building relationships with major donors? Would a dedicated page help?
- What questions do people ask us regularly that our website could answer better?

Keep in mind: An accurate website is the starting point. A useful website also helps the right person take the next step. Take care of straightforward fixes during the review. For larger ideas, agree on what deserves a follow-up conversation, who will lead it, and when you want to revisit it.

Determine Your Next Steps

Don't leave with a long wish list. Choose a few priorities you can actually move forward.

- What can we finish or correct now?
- What needs a separate conversation or a bigger plan?
- Who will take the lead on each priority, and by when?
- When will we check back in—and when should we meet with our outside marketing partner, if we have one?

Think ahead to the content you'll need. If next year's plans call for client stories, donor testimonials, or impact updates, start those conversations early and make sure people have meaningful choices about whether and how their stories are shared.

You don't have to figure out every detail today. You do want to leave knowing what matters most and what happens next.