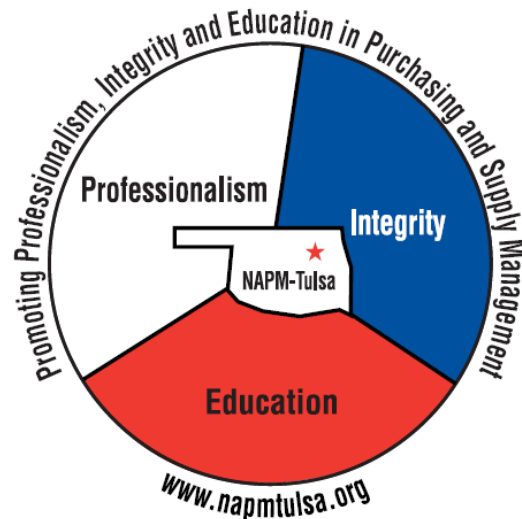




# 2007-2008 Marketing Plan



## OFFICERS

Robert E. Tipton, C.P.M., A.P.P., Chair  
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Daniel Bryant, Advisor, Past President  
Laina Riffe, Membership Chair  
Martin Arguelles, Education Chair  
Marilyn Medlock, Communications Chair

## EXECUTIVE SUMMARY

### Mission Statement:

*NAPM—Tulsa, Inc.'s mission is to promote professionalism, integrity and education in purchasing and supply management.*

### Marketing Plan

The 2007-2008 marketing plan seeks to generate an increase in NAPM—Tulsa, Inc. membership and activities in comparison to 2006-2007 achievements. The membership target is set at 140 members, which represents a planned 7.0% percent increase for 2006-2007, over the 2006-2007 fiscal year end count of 131. Unfortunately, the goal to grow membership during 2006-2007 was not met.

Membership retention goals have been set to retain at least 86% of members (125), after the 2008 dues billing from ISM. In researching reasons why members left this past year, few were preventable by NAPM-Tulsa. Top findings were that the members moved, changed positions or could not be reached. The NAPM—Tulsa, Inc. Membership Growth and Retention Plan is shown in Appendix II.

These increases in membership will be matched by increases in seminar and training activities. NAPM—Tulsa, Inc. will host three satellite seminars and conduct a full-day fall and spring seminar. The fall seminar is new for this year, replacing the Buyer-Supplier Expo of previous years.

NAPM—Tulsa, Inc. will host eight regular monthly meetings in September, November, December, January, February, March, May and June. The meeting in November will be held in conjunction with the fall seminar, which is the next day. April's event will be in the form of a plant tour. The February regular meeting will be in conjunction with the local APICS chapter. NAPM—Tulsa, Inc. and APICS will coordinate the host association each year. This year, APICS will host the meeting. The March regular meeting will be presented by our full-day seminar speaker and will be held the evening prior to the seminar. The March meeting will revolve around Supply Management Month. The May meeting is our Annual Meeting, and will include membership voting on the next board and any other necessary business. The June meeting will be the annual reception, honoring Retired Association Purchasing Professionals (R.A.P.P.'ers), installing the new board and honoring the year's W.L. "Bill" James Outstanding Member Award winner, the highest honor given by the association. Also, in May, we will host our annual Buyer-Supplier Golf Outing. The board will attend ISM Leadership in July and hold a planning retreat in July or August.

NAPM—Tulsa, Inc. has held a Buyer-Supplier Mixer/Expo for many years, but as a result of the reduced interest and participation in this event, we disbanded this event after 2005. This year, we will hold the fall seminar in November.

NAPM—Tulsa, Inc. launched its new mission statement in the 2004-2005 fiscal year. We unveiled the mission statement as part of the affiliate spirit competition at the 2005 ISM Leadership and won the spirit award as a result. Simply stated, our mission is to promote P.I.E. (or, Professionalism, Integrity and Education) in purchasing and supply management. NAPM—Tulsa, Inc. received a generous donation of pies from BAMA Pie, which we distributed to the

Leadership attendees. A logo was adopted to show our mission statement, and the mission statement will be printed on most correspondence, including our newsletters and website. Stickers were also handed out at Leadership, showing this new logo. The board will continue to enthusiastically promote this new mission and our organization to existing and prospective members. During the 2006 and 2007 ISM Leadership Conferences, we again focused on our mission, ensuring all attendees had a sticker with the mission on it.

**NAPM—Tulsa, Inc.**  
**Marketing Plan**  
**FOR**  
**2007-2008**

**TABLE OF CONTENTS**

TOPIC	PAGE
Executive Summary	2
Situational Analysis	5
Background	5
Normal Forecasting	8
Strengths, Weaknesses, Opportunities and Threats	9
Objectives and Goals	14
Marketing Strategy	17
Target Markets	17
Product List (Programs and Events)	17
Marketing Mix	19
Action Plan	19
Marketing Budget	20
Summary	20
Appendix I: NAPM—Tulsa, Inc. Membership Benefits	
Appendix II: NAPM-Tulsa, Inc. Membership Growth and Retention Plan	
Appendix III: NAPM-Tulsa, Inc. Board Calendar and Action Plan	

## SITUATIONAL ANALYSIS

### Background

#### History

NAPM—Tulsa, Inc. is the Tulsa area affiliate of the Institute for Supply Management™ (ISM). NAPM—Tulsa, Inc. is a professional organization comprised of purchasing, material and supply management personnel, and our mission is to promote professionalism, integrity and education in purchasing and supply management. NAPM—Tulsa, Inc. was founded in 1919 as a part of the National Purchasing Agents Association and later became known as the Purchasing Management Association of Tulsa (PMAT) and then NAPM—Tulsa, Inc..

NAPM—Tulsa, Inc.'s market area in terms of geography has not changed over the years. The membership is concentrated in a moderate sized city and its surrounding suburbs. Most of the membership lives and/or works in the Tulsa metro area, and a few members live and/or working up to 50-75 miles away.

NAPM-Tulsa regular dues were increased from \$160 to \$190 effective January 1, 2007. This change was to incorporate all monthly meeting dues and satellite seminar registrations into the annual dues structure. The board has found this to be very successful, as members do not have to request additional funds to participate in NAPM-Tulsa events. For those members that take advantage of our events, a savings is achieved through the year.

Previously, membership dues were increased in 2004, from \$140 for regular members and \$65 for associate members to \$160 for regular members and \$80 for associate members. This change was necessary due to a national increase of \$10 per member, plus a processing fee of \$10 per member for switching our dues billing to the national level.

Our dues remain some of the lowest in the area, and we strive to keep them low, as many members pay their dues out of their own pockets. Similarly, the board and committee chairs make every effort to keep program costs (other than monthly meetings and satellite seminars) to a minimum, offering some programs at or below cost. Operating costs this year are planned to be offset by the annual Buyer-Supplier Golf Outing. The board also maintains a scholarship program to support members.

Half of the 2007-2008 board was able to attend the annual ISM Leadership Training Workshop. NAPM—Tulsa, Inc. regularly sends the president to the ISM Annual International Supply Management Conference and encourages the rest of the board members to also attend. This year, we sent our 2006-2007 Advisor (also a Past President) on behalf of NAPM-Tulsa. The board also strongly promotes and encourages members to attend the annual Southwest Supply Management Conference, which is in October 2007, in Galveston, Texas. The board plans to sponsor the Finance Chair / Secretary (also a Past President) to attend on our behalf.

#### Markets

As the local affiliate of the premier professional education organization concerning the supply management and materials function and processes, NAPM—Tulsa, Inc. has these nine major target markets:

1. Supply management professionals and others who are members of ISM and NAPM—Tulsa, Inc. and utilize many of the ISM programs at all levels.
2. Supply management professionals and others who are not members of ISM and NAPM—Tulsa, Inc., but who use some ISM and NAPM—Tulsa, Inc. products and services on an irregular basis.
3. Supply management professionals and others who are not members of ISM and NAPM—Tulsa, Inc. and who may have some to no knowledge of ISM and NAPM—Tulsa, Inc. or its products and services.
4. Non-supply management managers in business.
5. Members of academe who are in contact with ISM and NAPM—Tulsa, Inc. and actively involved with the profession as educators, researchers or consultants.
6. Universities, colleges and community colleges that offer academic work in supply management and associated business topics.
7. Members of academe who are not in regular contact with ISM and NAPM—Tulsa, Inc. at any level.
8. Students, graduate or undergraduate, who may, if properly motivated and supported, enter the profession.
9. Universities, colleges and community colleges that do not offer academic work in supply management and associated business topics.

NAPM—Tulsa, Inc. records show that we primarily are serving markets one and two above with only minor participation by markets five to nine. Our records also show that we have not done very well in converting participants from markets three through nine into membership status, either as regular or associate members. Furthermore, we draw very few participants from these seven markets. Recruiting is an area that we have identified for strategic focus.

## History of NAPM—Tulsa, Inc. Programs

The basic format of the NAPM—Tulsa, Inc. program had remained essentially unchanged for the past several years. NAPM—Tulsa, Inc. would hold eight meetings a year and schedule and host three-to-four satellite seminars and one full-day seminar each year. NAPM—Tulsa, Inc. schedules at least one national level speaker per year. The others have a regional reputation. The Association has maintained a good program balance between hard-core professionalism and lighter topics with professional interest.

Attendance at the regular meetings, after declining a few years ago, has hovered around 10-15% of the membership and a few guests per meeting. Follow-up has begun for guests to attempt to convert them to membership. We maintain a supply of new member packets, and have these and other materials available at our monthly meetings.

As a result in the decline in attendance, the board began taking strategic actions over the past few years to improve attendance. The board began changing meeting times by offering lunch and breakfast sessions and meeting locations. This year, we plan to offer at least one breakfast and one luncheon session, in addition to two full-day seminars. The balance of the monthly meetings will be dinner meetings. All our meetings will be held at one location, as we've found members have easy access to the location, and it creates a base for NAPM-Tulsa. A new member orientation will be scheduled during the breakfast meeting.

This year, the board will continue to seek ways to shorten the time of the dinner meetings, due to the busy schedules of our members. In the past, dinner meetings would began at 5:30 PM and last as late as 8:30 PM. We are making efforts to cut at least one-to-one-and-a-half hours off this time in hopes more members will be able to commit to the meetings. Initial plans are to schedule meetings 5:15 PM to 6:45 PM.

Program and seminar announcements are posted in our monthly newsletter, on our website, through emails to our membership and in the local newspaper. We have discussed other media, but have yet to utilize any of it. A full fiscal year schedule will be published on our website in August 2007, and it will also appear in each newsletter. Furthermore, we will begin sending email announcements before each event at least twice.

NAPM—Tulsa, Inc. began offering two C.P.M. review courses in the 2005-2006 year. The reviews were offered free to the members. We were unable to offer these sessions in 2006-2007, and we do not plan to offer them at this time for 2007-2008. We are instead focusing on the new CPSM study materials and plan to survey members on possible interest in ISM's trial testing on the new certification in early 2008.

During the 2004-2005 fiscal year, the board purchased study materials to add to our member library, which will be added to annually.

During 2007-2008, the Board has selected "Constant Contact" as our primary method for communications, including program announcements, newsletters and surveys. This software is relatively inexpensive, and the time involved is reduced significantly from the past. The quality of communications will also be able to be enhanced. We will strive to enhance communications this year, as it seems to have a direct correlation with membership participation.

Our goal for 2007-2008 is to have 20-25% of our membership at each monthly program.

## Normal Forecast

Forecasting is an attempt to structure the future based on available facts and logical, supportable assumptions. Based on the ISM Report of Business Conditions, our Regional Report of Business Conditions and local economic development news, the board of NAPM—Tulsa, Inc. has created these assumptions as a foundation for the forecast.

1. The local and regional economy will continue to grow over the planning period.
2. The unemployment rate in most of the NAPM—Tulsa, Inc. area will continue to fall very slowly. Good employees will remain at a premium in the local market.
3. Right-sizing, reorganization and automation will continue in the area.

## Strengths, Weaknesses, Opportunities and Threats (SWOT)

The following is a self-evaluation of our affiliate. It identifies our strengths and weaknesses, which are internal to our organization, as well as opportunities and threats, which are external to our affiliate. The identification and evaluation of SWOT is vital to our planning process, for it will illustrate those areas we need to focus on.

### External Factors

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- *Economic forecasts for the market served*

Very high,  
a major  
opportunity

Neutral

Very low,  
a major  
threat

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- *Size of the underserved pool of supply management personnel in the market area*

Very high,  
a major  
opportunity

Neutral

Very low,  
a major  
threat

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- *Attendance and participation at seminars and other special programs*

Very high,  
a major  
opportunity

Neutral

Very low,  
a major  
threat

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- *Economic growth of the market area*

Very high,  
a major  
opportunity

Neutral

Very low,  
a major  
threat

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- *Level of competition from other professional organizations*

Very low,  
a major  
opportunity

Neutral

Very high,  
a major  
threat

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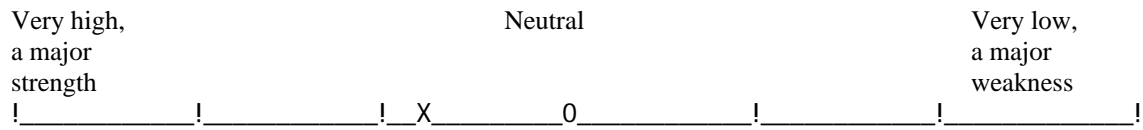
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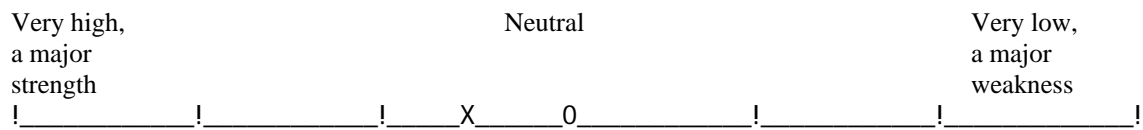




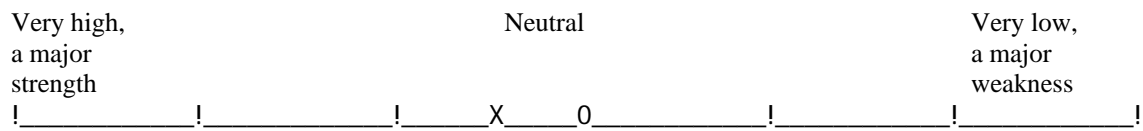
- *Attendance and participation of officers and committees in board meetings*



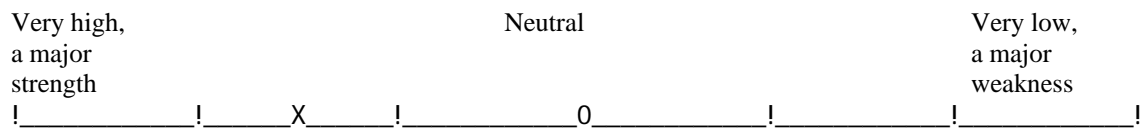
- *Attendance of officers and committee chairs in summer leadership training workshops*



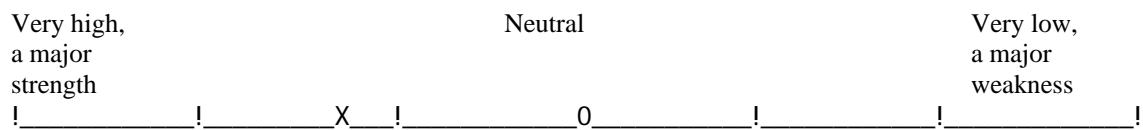
- *Number and trend of local educators involved in your affiliate*



- *Number and trend of C.P.M.s in your affiliate*



- *A viable and respected seminar and training program*

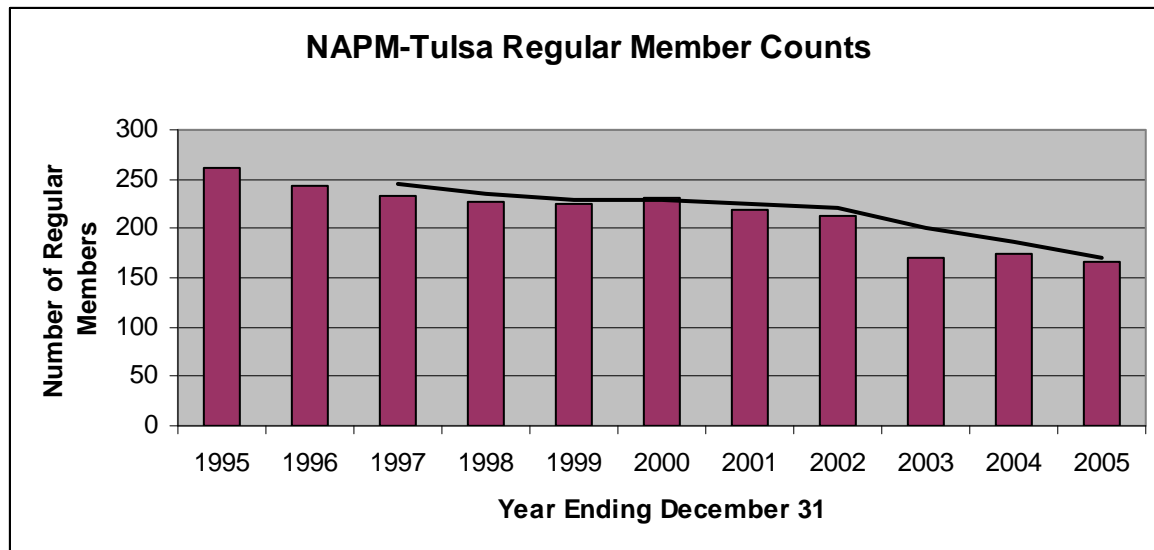


<b>SWOT</b>	
<b>Internal Factors</b>	<b>External Factors</b>
<b>Strengths</b>	<b>Opportunities</b>
Our financials are strong.	Tulsa's economic forecast is optimistic.
We have a full board.	There are many purchasing and supply management professionals and students in the Tulsa area.
The level of training and experience for our board is moderate-to-high.	More companies seem to be requiring continuing education and professional certifications.
Our affiliate has a very long tenure (1919).	There are more higher education schools in the Tulsa area, with opportunities for student and academic members.
Most of our board attends the ISM Leadership annually.	NSU-Broken Arrow is interested in working with NAPM-Tulsa.
Our varied meeting times and locations are showing promise.	Suppliers are willing to sponsor meetings and events to offset costs.
Our golf outing fundraiser has good participation and returns.	
Our seminars and programs are strong.	
We have a good level of C.P.M.'s and A.P.P.'s in our affiliate. with over 30% having the C.P.M. and over 7% having the A.P.P..	
<b>Weaknesses</b>	<b>Threats</b>
We have difficulty recruiting volunteers, beyond the board.	Increasing demands on members is leading to lower participation in programs and events.
Attendance at NAPM—Tulsa events is lower than desired (10-15%).	Competition from other professional associations is a concern.
Membership numbers have decreased the past two years.	Due to economic reasons, some of our sponsoring companies have ceased paying for more than one membership for employees for ceased paying at all.
Cash flow is tight at times, after switching to ISM dues billing and credit card processing.	Similar certifications offered by other associations.

## OBJECTIVES AND GOALS for NAPM—Tulsa, Inc.

The NAPM—Tulsa, Inc. Board has established these objectives and goals for the 2007 and 2008 years. The plans will be reviewed each year, and extended into the next fiscal year. Goals relating to membership growth and retention are shown in Appendix II.

1. Increase membership by 7.0% over the 2006-2007 achievements to 131 members. Last year's goal was not achieved. Calendar year-end numbers provided by ISM (exclusive of Associate, Lifetime Associate and Honorary Members of NAPM-Tulsa) are charted below (December 31, 2006 count was 157):



2. Increase attendance and participation in the regular meetings and events by 10% in 2007-2008 and thereafter, leading to total participation between 20-25%. Last year's goal of 3% growth in attendance was not met.
3. Increase membership retention by reducing the number of lost members at dues billing. We met our goal of 26 members in 2006-2007, but we are planning on 17 for 2007-2008. The 2005-2006 goal of reducing lost members by 27% from 33 members to 24 was not met, as we lost 42 members. Reasons for losses in 2005-2006 included (the same spread of reasons were cited in 2006-2007):

Left the company they were at and we had no secondary contact information:	12
Unresponsive to Board member attempts to contact them:	12
Moved out of our area	3
No longer in Procurement	5
Does not use or value membership	7
Retired	1
Company policy regarding memberships has changed	2

NAPM—Tulsa, Inc. uses the following methods to retain members:

- i. Varying meeting times (i.e. breakfast, lunch and dinner)
- ii. Timely meeting topics

- iii. Posting membership benefits online
  - iv. Maintaining an up-to-date website full of resources
  - v. Offering educational opportunities throughout the year (i.e. monthly programs, full-day seminars, and access to three-to-four ISM satellite seminars)
  - vi. Publishing articles annually reminding members of benefits
  - vii. Sending reminders to members about dues billing
  - viii. Personally contacting members who do not renew
  - ix. Analyzing why members do not renew
  - x. Collecting surveys from members at monthly events (This did not happen in 2005-2006 or 2006-2007, but we will utilize Constant Contact in 2007-2008.)
  - xi. Meeting, greeting and introducing new and existing members at events
  - xii. Offering letters to bosses on benefits
  - xiii. Surveying membership
  - xiv. Handing out C.E.H.'s at every qualifying event, as opposed to a year-end certificate. We find giving a tangible takeaway to be effective.
4. Maintain the percentage of members with C.P.M.'s at around 30% or higher, even with projected growth of 7.0%.
5. Apply for and receive the ISM Affiliate Excellence Award. We did not file in 2006 or 2007. In 2005, we applied and received 2005 Recognition of Merit for meeting all but one core objective, membership growth. We lost 8 members from December 31, 2004 through December 31, 2005.
6. Work closely with NSU-Broken Arrow and set up a scholarship program, using NAPM-Tulsa educational assistance funds, to support the NSU supply management curriculum that began in Fall 2007.
7. Continue volunteer recruitment and mentoring activities by:
- NAPM—Tulsa, Inc. seeks to recruit volunteers from the affiliate and seeks to mentor these volunteers by:
- i. Soliciting volunteers in the newsletter, website and during programs and events.
  - ii. Requiring that the board nominating committee includes regular members' involvement.
  - iii. Requiring that the W.L. "Bill" James Award committee includes regular members' involvement.
  - iv. Working together as a board on tasks and requiring succession planning from each board member, ensuring the appropriate information is handed down.
  - v. Encouraging all board members to attend training at ISM Leadership.
  - vi. Encouraging all board members to attend the annual retreat for training and planning.
  - vii. Encouraging board members to move up through the various positions of the board.
  - viii. Recognizing and personally thanking volunteers.
  - ix. Providing Certificates of Recognition and C.P.M. points to board members annually.

## MARKETING STRATEGY

### Target Markets for NAPM—Tulsa, Inc.

NAPM—Tulsa, Inc. will concentrate on these segments of its markets. People from these five markets are in our membership and service area.

1. Supply management professionals and others who are members of ISM and NAPM—Tulsa, Inc. and utilize many of the ISM and NAPM—Tulsa, Inc. programs at all levels.
2. Supply management professionals and others who are not members of ISM and NAPM—Tulsa, Inc., but who use some ISM and NAPM—Tulsa, Inc. products and services on an irregular basis.
3. Supply management professionals and others who are not members of ISM and NAPM—Tulsa, Inc. and who may have some to no knowledge of ISM and NAPM—Tulsa, Inc. or its products and services.
4. Members of academe who are in contact with ISM and NAPM—Tulsa, Inc. and actively involved with the profession as educators, researchers or consultants.
5. Universities, colleges and community colleges that do not offer academic work in supply management and associated business topics.

### Product List for NAPM—Tulsa, Inc.

NAPM—Tulsa's product list includes these specific products or events:

1. Eight monthly meetings with presentations on a variety of relevant purchasing and supply management topics. Each meeting will offer attendees one continuing education hour, which can be used toward certification. Meetings will vary in time (i.e. breakfast, lunch and dinner), so that we can reach different segments of our membership. We will remain at our base location this year for our dinner meetings and seminars. Members' dues now included these meetings. The February meeting will be our annual joint meeting with the local APICS Chapter.
2. Access to three ISM satellite seminars will be available to members and is now included in annual dues. Continuing education hours will be given to attendees.
3. Two full-day seminars will be held at a low cost to the membership. The monthly dinner meeting will be held the night before the seminars and will cover the same topic, to maximize education. Continuing education hours will be offered for the seminar and dinner meeting, with total hours of at least seven, or one C.P.M. point. The March seminar will promote Supply Management Month.
4. The NAPM—Tulsa, Inc. library will continue to be offered, and all members will have access to check out training materials.
5. The annual Buyer-Supplier Golf Outing will take place in May this year. The plan is to have about 100 members and suppliers participating in the event.

6. One plant tour will be held in April. The time and place of this tour will be set during the fiscal year.
7. Local job postings will be published on our website and in our monthly newsletter as a benefit to our membership.
8. An electronic roster of members will be available to all members of the association, upon request.
9. A printed roster will be developed in the fall of 2007, the first since 2002.

Our major communication and advertising efforts will be aimed at these market segments:

1. Supply management professionals and others who are members of ISM and NAPM—Tulsa, Inc. and utilize many of the ISM and NAPM—Tulsa, Inc. programs at all levels.

For our own members we will continually improve the NAPM—Tulsa, Inc. newsletter and website, adding timely and useful information that our members need.

We will publish a complete annual program of events for better planning by members. Topics, places and times will be announced throughout the year.

We will allow access to a roster of the membership for all members via our website. Requests will be received by the Communications Chair, who will ensure that only members are receiving the list. A printed roster will be mailed to membership in late 2007, the first since 2002.

Retention efforts will be made in advance of the annual dues billing by ISM to notify our membership that they will be receiving invoices. An article will be published at the fall newsletters, emphasizing the value of membership and listing the benefits (reference Appendix I). A list of non-renewing members will be distributed among the board, and each person will be contacted personally to remind them to renew or to investigate why they are not. The reasons will be reviewed by the board as a part of continual improvement.

Each new member will receive a welcome letter, explaining ISM and NAPM—Tulsa, Inc., and a list of membership benefits (reference Appendix I). This list of benefits will be posted online through ISM and on our NAPM—Tulsa, Inc. website.

2. Supply management professionals and others who are not members of ISM and NAPM—Tulsa, Inc., but who use some ISM and NAPM—Tulsa, Inc. products and services on an occasional basis.

We have begun to offer prospective members one free meeting in order to encourage them to become members. Prospective members will also receive informational letters from the Membership Chair, along with the list of benefits (reference Appendix I).

Prospective members will be kept in our membership database and will receive communications on upcoming events.

3. Supply management professionals and others who are not members of ISM and NAPM—Tulsa, Inc. and who may have some to no knowledge of ISM and NAPM—Tulsa, Inc. or its products and services.

We will expand our communications efforts through continuing to advertise upcoming events in the local newspaper and investigating other media to reach these individuals.

We will allow executives outside purchasing and supply management (and who are not directly involved in sales) to join our organization so that they can experience the benefits firsthand and allow that their purchasing and supply management to learn about the organization and possibly join.

We developed an NAPM-Tulsa membership brochure in 2006, and will have a 2007-2008 version available for use in membership marketing.

10. For the two academic market segments, we will develop relationships this year to expand our reach and involve the academic community both at the faculty and student levels.

We will strive to have at least one faculty member of a local university speak at one of our monthly meetings, and we will encourage that the faculty member announce the event to students, inviting them to attend.

We will have academic/student membership applications available for all interested individuals, as their membership is free of charge.

We will work to build a relationship with NSU-BA, including having professors from the university as academic members and speakers. We will investigate setting up a scholarship program with NSU-BA to support their supply management degrees begun in Fall 2007.

We will participate in at least one student job fair.

## Marketing Mix for NAPM—Tulsa, Inc.

NAPM—Tulsa, Inc. will do these things to bring our plan to our customers:

### *Product*

The products are listed above. We will seek feedback from our membership on topics they would prefer for the dinner meetings and the full-day seminars.

### *Price*

We will continue to price all our products as low as possible. Membership fees will not be raised for 2008. The inclusion of monthly meetings and satellite seminars fees into the dues structure appears to be successful. Full-day seminars and other special programs will be at or below cost for members of NAPM—Tulsa, Inc. The NAPM—Tulsa, Inc. library continues to be a free service to members and local academic institutions.

### *Promotion*

A new communications format is to be utilized in 2007-2008 (previous change was in 2004) for the NAPM—Tulsa, Inc. Newsletter, and its ease of read will be increased. We plan to utilize “Constant Contact”. The newsletter will be archived on our website for easy access and fast downloading. We will send out letters to potential members and have surveys at our monthly events. We will significantly increase the efforts to promote the programs of NAPM—Tulsa, Inc. over several different forms of media. A special effort will be made to reach supply management professionals in organizations not now included in NAPM—Tulsa, Inc. Our new mission statement will be used on most correspondence.

In 2007-2008, we have also changed our NAPM-Tulsa logo from the former “National Association of Purchasing Management” logo to one that has the Institute for Supply Management™ logo, with “NAPM-Tulsa, Inc.” below it. This is to tie NAPM-Tulsa in closer with the ISM branding.

### *Place*

As explained throughout this plan, NAPM—Tulsa, Inc. has found that varying meeting times helps reach out to more members. However, we have found it is beneficial to base our meetings in a centralized location, which we will continue to do during 2007-2008. This will also allow us to negotiate lower costs. We have selected a low-cost, high quality facility for our programs and events that will attract our membership and potential members.

## **Action Plan**

Specific actions to be accomplished by specific action persons or committees are set during our annual planning retreat in July/August. A board calendar will be developed and distributed to all board members, with due dates and action items to be performed each month. The calendar will be reviewed during each monthly board meeting to ensure that all items are being covered satisfactorily. The calendar is attached as Appendix III.

## **Marketing Budget and Controls**

The Membership Chair, in conjunction with the Finance Chair / Secretary, is responsible for the overall coordination of the marketing budget and for evaluating its effectiveness in terms of program impact. The marketing budget for 2007-2008 has been set and will be used for mailing prospective member packets, ordering new member name badges and other membership/marketing correspondence. This amount also allows for several free meetings for prospective members.

The newsletter and website communication all under the budget of the Communications Chair, and it has been set.

The Education Chair's budget has been set and includes speakers' fees, facilities rental and program incentives, awards and educational assistance.

The Pro-D Chair's budget has been set at and includes speakers' fees, facilities rental, and educational assistance. Additions to the affiliate library would also come from the Education Chair's budget.

The budgets for all board members will be tracked by the Finance Chair / Secretary and reported on quarterly during monthly board meetings. The financials will be reviewed by an outside source or committee of members annually.

## **SUMMARY**

This Marketing Plan is for 2007-2008. Each year the plan will be updated and rolled forward by the board. Each officer of NAPM—Tulsa, Inc. is responsible to this plan in terms of its execution and control. Marketing quality products and services to our customers is everyone's responsibility. The board will ensure our mission "to promote professionalism, integrity and education in purchasing and supply management" is met.

### **Official**

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Robert E. Tipton, C.P.M., A.P.P.  
Chair  
NAPM—Tulsa, Inc.

### **Published**

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Marilyn Medlock  
Communications Chair  
NAPM—Tulsa, Inc.

## *Appendix I – NAPM—Tulsa, Inc. Membership Benefits*



NAPM—Tulsa, Inc.  
PO Box 470549  
Tulsa, OK 74147

### **NAPM-Tulsa Membership Benefits**

#### **Included in your membership at no additional charge:**

- Monthly Meetings with Exciting Speakers and Timely Topics September Through June
- Access to ISM Satellite Seminars
- Monthly Newsletter, “News & Views,” Emailed to Members and Archived on the Website
- NAPM-Tulsa Website [www.napmtulsa.org](http://www.napmtulsa.org), Offering the Latest News, Information, Job Postings and Resources.
- Annual Plant Tour (in Lieu of Monthly Programs)
- Professional Growth Through Numerous Networking and Leadership Opportunities
- Annual Joint Meeting with the Tulsa Chapter of APICS
- Access to Affiliate Membership Directory
- Affiliate Library
- Educational Assistance/Scholarship Fund
- Numerous Opportunities to Accrue C.P.M. Points
- Professional Recognition Through the Annual W.L. “Bill” James Outstanding Membership Award
- Numerous Short-Term and Long-Term Volunteer Opportunities Including Executive Affiliate Leadership and Committee Involvement

#### **Additional benefits at a discount for members:**

- Annual Buyer/Supplier Golf Tournament
- One-day seminar(s) relating to purchasing and supply management
- Discounts on Additional Educational Seminars
- Annual Southwest Forum Supply Management Conference

*Appendix II – 2007-2008 Membership Growth and Retention Plan*

	July	August	September	October	November	December	January	February	March	April	May	June
Regular Count	102	102	104	107	110	112	114	99	102	105	107	109
Regular Add	0	2	3	3	2	2	2	3	3	2	2	2
Regular Minus	0	0	0	0	0	0	17	0	0	0	0	0
Regular Dues	\$ 30.00	\$ 25.00	\$ 20.00	\$ 112.50	\$ 105.00	\$ 97.50	\$ 90.00	\$ 82.50	\$ 75.00	\$ 67.50	\$ 60.00	\$ 52.50
Regular Dues Income	\$ -	\$ 50.00	\$ 60.00	\$ 337.50	\$ 210.00	\$ 195.00	\$ 7,210.00	\$ 247.50	\$ 225.00	\$ 135.00	\$ 120.00	\$ 105.00
Associate Count	0	0	0	0	0	0	0	0	0	0	0	0
Associate Add	0	0	0	0	0	0	0	0	0	0	0	0
Associate Minus	0	0	0	0	0	0	0	0	0	0	0	0
Associate Dues	\$ 40.00	\$ 33.33	\$ 26.66	\$ 100.00	\$ 93.33	\$ 86.66	\$ 80.00	\$ 73.33	\$ 66.67	\$ 60.00	\$ 53.33	\$ 46.67
Associate Dues Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
VDM Count	14	14	14	14	14	14	14	14	14	14	14	14
VDM Add	0	0	0	0	0	0	0	0	0	0	0	0
VDM Minus	0	0	0	0	0	0	0	0	0	0	0	0
VDM Dues (all 25% discount)	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50	\$ 67.50
VDM Dues Income	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 945.00	\$ -
Total Dues-Paying Count	116	118	121	124	126	128	130	116	119	121	123	125
Student & Academic Members	3	3	3	3	3	3	3	3	3	3	3	3
Student Add	0	0	0	0	0	0	0	0	0	0	0	0
Student Minus	0	0	0	0	0	0	0	0	0	0	0	0
Lifetime & Honorary Count	12	12	12	12	12	12	12	12	12	12	12	12
Lifetime Add	0	0	0	0	0	0	0	0	0	0	0	0
Lifetime Minus	0	0	0	0	0	0	0	0	0	0	0	0
Trial Count	0	0	0	0	0	0	0	0	0	0	0	0
Trial Add	0	0	0	0	0	0	0	0	0	0	0	0
Trial Minus	0	0	0	0	0	0	0	0	0	0	0	0
Total Membership Count	<b>131</b>	<b>133</b>	<b>136</b>	<b>139</b>	<b>141</b>	<b>143</b>	<b>128</b>	<b>131</b>	<b>134</b>	<b>136</b>	<b>138</b>	<b>140</b>

**Assumptions:**

- (1) Will grow (net) dues-paying (regular, associate, VDM) by 8% (July 2007:  $116 * 1.08 = 125$  members)
- (2) Will retain 86% of dues-paying members (December 2007:  $128 * 0.14 = 17$  losses)
- (3) VDM Members receive 25% discount across the board and will remain steady in 2007-2008.
- (4) Total membership will grow (net) by 7% ( $131$  from July 2007 \*  $1.07 = 140$  members in June 2008)

***Appendix III – 2007-2008 Board Calendar and Action Plan***

**NAPM-Tulsa, Inc.**

Annual Board Calendar  
2007-08

Date	Time	Subject	All Board Members	Chair	Vice Chair	Finance Chair / Secretary	Membersh hip C h a i r	Communications Chair	Education Chair	Advisor
<b>July/August</b>										
		Post office Box Renewal / Budget Approved		X	X	X	X	X		
		Safety Depositi Box, Corporate Resolution, Bank Accounts (Signatures)		X	X	X				
7/21/2007	9:00 a.m.	Board Retreat	X							
7/21/2007	3:00 p.m.	Board Meeting	X							
7/21/2007		Information on September meeting due to Chair	X						X	
7/26/2007		Aug. Newsletter Articles Due * (W.L. "Bill" James Award)	X	X				X		
8/1/2007		Newsletter Distributed to Membership		X				X		
8/23/2007		Sept. Newsletter Articles Due*	X	X				X		
		*SW Supply Mgmt. Conference Info., Sept. Meeting, Calendar, Fall Seminar								
		Intro of board members, Oct. Satellite Seminar, Report on Year to Come!								
8/24/2007		Cosgrove award nominations due into Southwest Forum		X						X
8/28/2007		Issue September Meeting Notice		X				X	X	
									X	
<b>September</b>		Roster								
		Insurance renewal month				X				
9/1/2007		Newsletter & meeting notice issued		X				X		
9/4/2007	5:30 p.m.	Board Meeting	X							
9/4/2007		Report on Roster		X			X	X		
9/11/2007	TBD	Monthly Program and Orientation	X				X		X	
9/20/2007		October Newsletter Articles Due*	X	X				X		

		*SW Supply Mgmt. Conference Info., Calendar, Fall Seminar							
		Oct. Satellite Seminar, Dues Notice for November 1, Report on Sept. Program							
9/25/2007		Issue October Meeting Notice and Satellite Seminar Notice		X			X	X	
		<b>Action Items September</b>							
		<b>October</b>							
								X	
10/1/2007		Newsletter & meeting notice issued		X	X		X		
10/2/2007	5:30 p.m.	Board Meeting	X						
10/2/2007		Report on Fall Seminar to Chair						X	
10/11/2007	9:00 a.m.	Satellite Seminar - Global Sourcing: Where in the World Are Our Suppliers?						X	
10/15/2007		Mail Roster, Dues Notice/Reminder, Member Benefits to Membership		X		X	X		
10/24-10/26		Southwest Supply Mgmt. Conference - Galveston, TX	X	X					
10/25/2007		November Newsletter Articles Due*	X	X			X		
		* Notice of 2008 dues, fall seminar, November meeting, calendar, report on SW Conf,							
		Report on October program							
10/23/2007		Issue November Meeting Notice		X			X	X	X
10/30/2007	5:30 p.m.	NOVEMBER Board Meeting	X						
10/30/2007		Quarterly Financial Report Due (July-Sept)			X				
10/30/2007		Information on December program to Chair						X	
		<b>October Action Items</b>							
		Begin work on selecting a speaker and topic for Spring Seminar	X					X	
		<b>November</b>							
11/1/2007		ISM Mails Dues Invoices to Membership							
11/1/2007		November Newsletter Issued		X			X		
11/6/2007	5:30 p.m.	November Program - Marilyn Gettinger	X					X	X
11/7/2007	9:00 a.m.	Fall Seminar - Marilyn Gettinger	X					X	
11/15/2007		ISM Emails Dues Invoices to Membership							
11/15/2007		December Newsletter Articles Due*	X	X			X		
		* Dues billing information, December meeting notice, February Satellite Seminar, Report on Fall Seminar							
11/27/2007		Information on December program issued		X			X	X	
		<b>December</b>							
12/1/2007		ISM Emails Dues Invoices to Membership							

12/1/2007		December Newsletter Issued		X				X		
12/4/2007	6:00 p.m.	Board Holiday Dinner	X							
12/4/2007		Information on January meeting due to Chair							X	
12/4/2007		Information on Spring seminar due to Chair							X	
12/11/2007	TBD	Monthly Program	X						X	
12/20/2007		Newsletter Articles Due*	X					X		
		* Dues billing reminder, January meeting notice, February Satellite Seminar, Joint Mtg with APICS (February), Spring Seminar, Report on December program								X
12/20/2007		January Program Information Issued		X				X	X	
		<b>Action Items for December</b>								
		Finalize details for January program							X	
		Prepare and include February satellite seminar in newsletter						X	X	
		Finalize Spring seminar and prepare flyer for January newsletter						X	X	
		Begin work on April plant tour							X	
		Begin Affiliate Excellence application process		X						
<b>January</b>										
1/3/2008		January Newsletter Issued		X				X		
1/8/2008	5:30 p.m.	Board Meeting	X							
1/8/2008		Report on Spring Seminar due to Chair							X	
1/15/2008	TBD	January Program and Orientation	X				X		X	
1/24/2008		February Newsletter Articles Due*	X	X				X		
		* February meeting (w/ APICS), Satellite Seminar, Spring Seminar, Supply Mgmt Month,								
		W.L. "Bill" James application, Nominating Committee announcement, Report on Jan. Prog.								
1/29/2008		February Program Information Issued and Satellite Seminar Notice		X				X	X	
1/31/2008		Deadline for submitting excellence award to ISM		X						
									X	
		<b>Action Items for January</b>								
		Submit Excellence award application to ISM		X		X				
		Set golf outing date & begin working on details								X
		Finalize activities for celebrating Supply Management Month	X						X	
		Finalize February Satellite Seminar details							X	



		Management Month							
3/20/2008		April Newsletter Articles Due *	X	X				X	
		* W.L. "Bill" James Nominations, Board Nominations, April Satellite Seminar, April Plant Tour, Report on March seminar, Golf Outing							
3/25/2008		April Plant Tour Issued and Satellite Seminar Notice		X				X	
		<b>Action Items</b>		X					
		Finalize nominations for Board elections and include in April newsletter		X					
		<b>April</b>							
4/1/2008		April Newsletter Issued		X				X	
4/1/2008		Board Meeting	X						
4/1/2008		Information on May meeting due to Chair							X
4/2/2008		Mail Postcards on Golf Outing						X	X
4/8/2008	TBD	April Plant Tour	X						X
4/15/2008		Issue second notice of Board elections to members; Reminder on W.L. "Bill" James Noms.		X				X	
4/17/2008	9:00 a.m.	Satellite Seminar - Supply Management's Role in Sustainability							X
4/24/2008		Newsletter Articles Due*	X					X	
		* Annual Meeting, Board Noms., Golf Outing, Report on plant tour							
4/29/2008		May Meeting Notice Issued		X				X	
4/29/2008	5:30 p.m.	MAY Board Meeting	X						
4/29/2008		Quarterly Financial Report Due to Chair (Jan-Mar)				X			
		<b>Action Items for April</b>							
		Mail out golf outing information to suppliers in early April						X	X
		Mail out golf outing information to members in early April						X	X
		Include board elections and candidates in May newsletter		X				X	
		Prepare quarterly finance report for period ending March 31st.				X			
		Begin planning W.L. "Bill" James reception & R.A.P.'ers reception			X				
		<b>May</b>							
		<b>ISM International Conference Month</b>							
TBA		W.L. "Bill" James Selection Committee meets		X	X				
TBA		Golf Outing at Forest Ridge	X						X
5/1/2008		May Newsletter Issued		X				X	

5/4-5/7		International Conference and Expo (St. Louis)	X	X					
5/13/2008	5:30 p.m.	May Program and Annual Meeting	X					X	
5/22/2008		June Newsletter Articles Due*	X				X		
		* Golf Outing?, R.A.P.P.'ers Night Reception, Results of May Annual Meeting, Report on Int'l Conference							
5/20/2008		Mail W.L. "Bill" James and R.A.P.P.'s invitations to R.A.P.P.'ers			X				
5/20/2008		Order President's plaque and gavel, and W.L. "Bill" James Award Plaque			X				
5/27/2008		June Meeting Notice Issued		X			X		
		<b>Action Items for May</b>							
		Election of Officers		X					
		Finalize W.L. "Bill" James reception location and time			X				
		Final meeting of W.L."Bill" James selection committee			X				
		Order President's plaque and gavel, and W.L. "Bill" James Award Plaque			X				
		Select Person to install board		X					
<b>June</b>									
6/1/2008		June Newsletter Issued		X			X		
6/3/2008	5:30 p.m.	Board meeting (Joint dinner meeting)	X						
6/3/2008		Finalize Leadership plans	X	X	X	X			
6/10/2008	5:30 p.m.	W.L. "Bill" James, R.A.P.P.'ers reception and installation of officers	X	X	X			X	
6/12/2008		Submit New Board of Directors List to ISM				X			
6/30/2008		End of Fiscal Year	X			X			
		<b>Action Item for June</b>			X				
		Finalize travel plans for summer leadership		X	X	X			
		Prepare Chair's honorarium for presentation at reception			X	X			
		Renew Constant Contact (12 mos. Prepaid) before August 21 (paid 8/22/07)		X		X	X		
		Issue budget request for next fiscal year to all new board members	X			X			