
A CO-OP GUIDE TO MARKETING MEMBERSHIP AND INVESTMENT OFFERS

A Handbook

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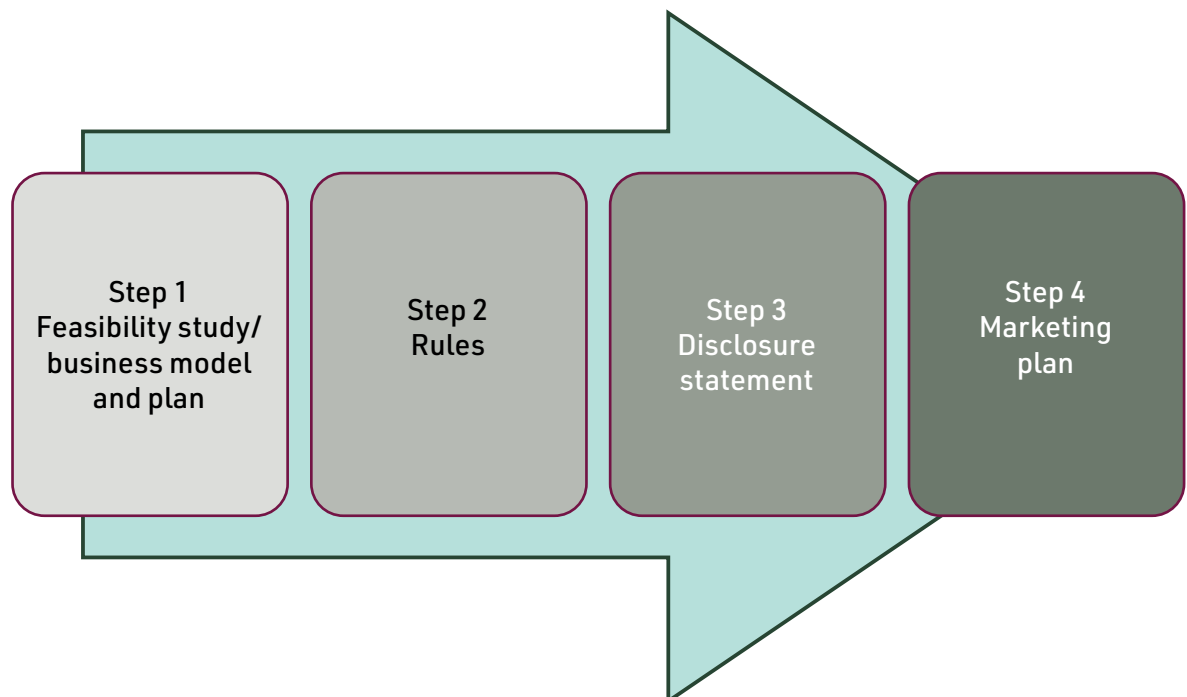
Introduction

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

This guide is designed to support a co-op with the promotion of an offer. It provides a step-by-step guide to create and implement an offer-specific marketing plan, with case studies from The Coota District Co-op.

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

Before the marketing plan is developed it is recommended that the first three steps are completed. For established co-operatives, the second step may not always be required.



Step 1 – Feasibility study/business model and plan:

Establish that there is a viable and sustainable business case behind the offer, including a detailed business plan outlining how this offer will move from an idea to supporting a viable and sustainable co-operative

Step 2 – Rules:

Draft the co-operative rules for a new co-op, or, if required for existing co-ops, make any amendments.

Step 3 – Disclosure statement:

Draft the disclosure statement (if required), or for existing co-ops, provide an updated disclosure statement, as required for the type of offer.

Step 4 – Marketing plan:

Create and implement a marketing plan detailing the target audience/s, the important messages and how you will share these messages.

Resources

These resources provide more information relevant to the above steps.

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

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

Capital Builder – a free resource for co-operatives thinking about raising new funds.

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

Community Investment for Co-operatives Handbook – refer to Parts 3 and 4 for what is required to prepare different types of investment offers.

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

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

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

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

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

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

Definitions

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

The co-op offer

Your offer will vary according to the stage your co-op is in. For example, you might be:

At pre-registration stage:

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

Marketing your first or opening offer:

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

Raising additional capital:

- Offering investment opportunities to raise capital using debentures or Co-operative Capital Units (CCUs)

You'll also need to consider whether the offer is aimed at new members, existing members or external investors, or a combination.

Activity

This document is to plan for marketing the following offer:

It is a member/external/both member and external offer.

Please remove the irrelevant option in the workbook.

Resources

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

Have you checked:

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

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

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

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

Activity

Our goal is for this offer to:

And this is how we will achieve it:

Membership and shares above the minimum in a new co-operative

This is a member offer.

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

And this is how we will achieve it:

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

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



Develop the message and share your vision

Why are you doing this?

- What problem or pain point motivated you to take action?

What is your vision?

- If your co-operative offer is a huge success, what “dream” goal will be achieved?

Remember, your vision needs to be aspirational and not easily achieved. It is something that is currently out of reach, but that you believe can be achieved with hard work and commitment.

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

This is the background:

- Briefly explain the situation that led to the idea of forming a co-op, or what led to the development of an established co-op’s current strategy.
- In three sentences, give a brief history of the community, how it has always operated (its values as you believe them to be), and what makes it such a great community.
- In one or two sentences describe what happened and how it led to the co-op/strategy idea.

This is our vision:

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

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

Activity

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

A new local retail shop

OUR STORY

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

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

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

We don't want that to happen.

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

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

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

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

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

Can we count you in?



The value of your vision for members/investors

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

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

Remember: you are selling the vision.

From your business plan:

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

From your rules:

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

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

By taking up this offer you will:

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

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

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

Activity

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

- 1
- 2
- 3
- 4
- 5

By taking up this offer you will:

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

Key messages

How can AI help?

Once you have articulated your vision, story and values, you will have the bones of your messaging in place. At this point it could be useful to make use of an AI agent (e.g., ChatGPT, Claude, etc) to help you craft your key messages.

However, it is advisable to exercise caution with regards to data security. Don't put any confidential or commercially sensitive information into an AI agent. In addition, you should not rely on AI alone, but rather use it to create an initial draft that can then be refined.

The next step is to condense these sentences down into the important key messages that you would like to share. We recommend that you have at least two key messages.

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

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

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

Time-bound messaging

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

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

Marketing and promotion should focus on the experience of being part of the journey in achieving the outcomes identified in the co-op's vision.

Messaging can also include outcomes of recent research around markets and the potential opportunities. You might also consider sharing the success of previous offers and current business performance.

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

Tone of messaging

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

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

The tone can adopt one or more of the following examples:

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

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

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

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



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

[Monty Hub Project](#)

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

[Castlemaine Community Investment Co-operative – debenture offer to members](#)

[Sabby Co-op – membership in new co-op](#)

Activity

	Our key messages
1.	
2.	
3.	

Our key messages

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

Deliver the message

Who

To whom are you marketing this offer?

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

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

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

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

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

A note on membership marketing vs consumer marketing:

The type of marketing being undertaken for co-operatives is, by definition, membership marketing. Unlike one-off sales, this involves creating a stable, loyal membership base by being:

- Relationship focused – you want your target audiences to commit for the long haul, so you need to communicate that the offer is about listening, relationship building and growing together.
- Values driven – your offer must provide unique value that makes them feel part of something exclusive.
- Community building – be clear that you are fostering a new community for them to connect with and benefit from.

To achieve the above you need to define your target audiences, understand their needs and tailor your offering accordingly.

Activity

	Our target markets/audience
1.	
2.	
3.	
4.	

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

Our target markets/audience

1. People who Cootamundra has been good to; that is, those who have been successful here – both those still here and those who have moved away.
2. Create a list, with contact details of the residents who may be able to contribute more.
3. Families – that is, parents with children.
4. Professionals and tradespeople – create a list with contact details of the businesses that have been in the area for years that might make a more significant investment.
5. Those with pride in the town.
6. Local and regional shoppers.

Where

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

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

Here are some examples for you to consider.

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

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

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

Here are some examples of tools that might be relevant:

- Hard-copy written communication (flyers, postcards, letters or direct mail, etc)
- Digital communication (social media, emails (EDM – electronic direct marketing), newsletters, website or blog, etc)
- Videos
- Word of mouth (storytelling, public speaking or small groups)
- Visual communication (posters, signs or banners, etc)



Activity

	Our target market	Where to find them	Which tools to use
1.	<i>Local residents</i>	<i>Facebook Town hall</i>	<i>Video Poster</i>
2.			
3.			
4.			

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

Where to find our target audiences:

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

How

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

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

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

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

- **Online promotion:**

- a link to a page on your website that has clearly laid-out information on what is involved in taking up the offer, with links to the disclosure statement and co-op rules
- an online application form that captures all required information (and takes payment, if possible)

- **Hard-copy promotion:**

- a flyer/poster with information about the offer with information on how to apply, and access the disclosure statement and co-op rules
- a printed application form with clear directions on how to lodge it

To consider:

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

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

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

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

Resources

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

This video outlines the project's history, vision and need for funding, as well as highlighting the opportunity to be both part owner and member: [Share Offer - Stretford Public Hall](#).

This campaign on birchal.com focuses on the value of the Good Earth Dairy – Pure Australian Camel Milk product, its reputation and credibility and the business model. In their video, at the time, they talked about their investments to date, technology, intellectual property and previous crowdfunding campaigns and what they did with this money. They also outlined their intentions of what they will do with the money from this campaign but DID NOT mention financial returns. You may consider opening up an account on Birchal to see examples of videos used to promote offers.

Activity

	Our offer documents and application form will be accessible via the following options:
1.	
2.	

How will we find our target audience?

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

Tips

Logo

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

Style guide

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

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

Creative software

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

Educational resources

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

Website

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

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

Launch event

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

- Is it to broadcast that the project is happening and to build excitement about it before the official launch?
- Is it to share information about the project with potential members, and get their input?
- Is it to sign up new members?

Your reasons for holding a launch event will help to decide the format as well as your budget.

How do you want to deliver your launch event?

In-person and/or online?

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

Benefits of an in-person event include:

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

Risks of an in-person event:

- Can be more expensive than online
- Often more logistics and stakeholders to manage
- A compelling speaker or presenter is needed to ensure the crowd remains engaged
- Some invitees may not be able to attend – how might you follow them up?
- People cancel last minute

Benefits of an online event include:

- People can attend from many locations
- Capture contact information from registrations
- Save money on venue hire, catering and other areas (although additional costs may be incurred for streaming platforms)
- You can record the chat questions for follow up, and use for your communications messaging as needed
- Guests can ask questions anonymously and avoid feeling self-conscious
- You can record the session for non-attendees and use it as promotional material

Risks of an online event:

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

Sometimes, the best option is neither! A launch event can simply be the release of your co-op concept, fundraising campaign or key information. It can be the “go-live” process of your website and the link to sign up or pay.

Printed materials

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

Photography and video

Good quality photos and videos are very engaging, but can also be costly to have done professionally. However, visual assets are excellent sales tools, so may pay for themselves in the longer term. If budget is an issue, arranging a photoshoot with a detailed brief for the photographer that will provide you with images you can use on the website and all other collateral, is the best investment.

A video can be considered once budget allows. It should be carefully thought out and scripted, no longer than two minutes, and highly engaging.

Video can also be used to capture community opinions in support of the vision for the co-op. These don't need to be professionally done and can be a great tool to provide a motivational message.

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

**It is better to only do a few things but do them well.
Be realistic about the resources and time available to your co-op.**

The plan

Marketing timeline

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

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

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

Now you will have a consistent message and brand to apply to the following channels and across social media:

- Email marketing (this is a very important tool for membership marketing) – [Mailchimp](#) is a user-friendly platform
- Flyers and posters
- Letters
- Videos
- Presentations

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

Examples of activities may include:

A launch event

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

Digital media

- Refer to the “where” section of this guide to ensure you use the right platforms to reach your target audience
- Run a campaign across these different platforms such as:
 - Social media
 - A website
 - A video

Hard-copy print

- Create hard copies of your prospectus, posters, brochures and flyers
- Again refer to the “where” section and pick the most appropriate format to communicate and share your offer promotional material. This might be via post, handing out flyers or placing them in local shops, businesses and community buildings.

Resources

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

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

Activity

	Our activities will include the following:
1.	
2.	
3.	

Our activities will include the following:

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

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

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



Our co-op offer

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

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

Additional resources

Online co-op resources

[Co-operative Foundations module 4](#)

[Business plan template](#)

[Capital Builder](#)

[Co-op Builder](#)

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

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

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

Articles of interest

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

Online tools

- [Canva](#) – Design software
- [Hubspot](#) – Marketing and communications advice
- [WordPress](#) – Website building
- [Squarespace](#) – Website building
- [Mailchimp](#) – Email marketing

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

1. Main head
with red line

The value of your vision for members/investors

2. Sub head

We don't want that to happen

3. Sub
section

Online co-op resources

4. Bold

From your business plan

Body Text

We have a plan to take control of our town's future by creating an innovative, creative and exciting alternative: The Coota District Co-op, a retail space that will stock items that we need in our town and will provide employment for our youth.

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